

# **SECRETARY VERSUS OFFICE MANAGER: A PARADIGM SHIFT**

by

**JUDITH LEVINE WILKINSON**



**VAAI UNIVERSITY OF TECHNOLOGY**  
(Formerly Vaal Triangle Technikon)

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**SECRETARY VERSUS OFFICE MANAGER:  
A PARADIGM SHIFT**

by

**JUDITH LEVINE WILKINSON**

*Researched*

**Submitted in accordance with the requirements  
for the Degree:**

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in the Discipline  
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Psalm 91:2

"This I declare, that he alone is my refuge, my place of safety; he is my God, and I am trusting him."

## **ABSTRACT**

The objectives of this research project were primarily to determine the requirements of commerce and industry for competent office managers, to contribute to the curriculum development of information administration, to facilitate action learning (AL) in information administration, and by making changes in training to empower learners to become competent office managers.

The influence of training and development of office managers is explained. The National Qualification Framework (NQF) integrates training and education in business and management on all levels. An important aspect is, that professional institutes, education and training institutions and other stakeholders, are combining experience to collectively benefit learners, employers, professions and the economy as a whole.

A combination design of both quantitative (traditional) research and qualitative (action) research, including two questionnaires (open-ended and closed), interviews, observations, focus groups and a case study, were used.

This study proved the relevance of office management education, by way of the demand for a formal qualification by commerce and industry, as a primary result of the phenomenal change in technology and the need for multi-skilled office managers. A contribution to the training of office managers concerning the following aspects was made: A profile for an office manager, as well as highlighting the need for training, curriculum development, and portfolio development.



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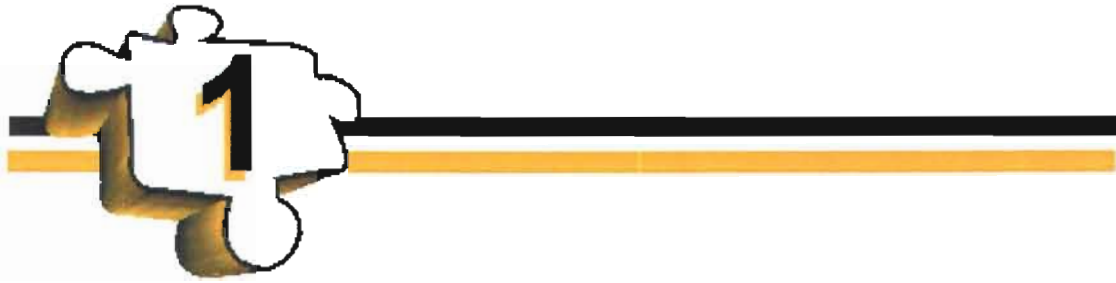
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## INTRODUCTION TO THE INVESTIGATION

### 1.1 INTRODUCTION

According to Barker (1989), in his study of the resistance to change, the reason for not accepting new ideas, lies in paradigms. The problem is, that the paradigm effect blinds people to new ideas and creative solutions. Rules and regulations keep people from successfully anticipating the future. A successful past blocks a vision to the future. Barker (1989), therefore considers it important to develop a greater degree of openness to new ideas, and a willingness to explore different ways of doing things.

As early as 1989 it was recorded by Pickworth (1989:1), that in a rapidly changing South Africa, a need exists for economic and industrial growth. This need requires a supply of suitably skilled people. Furthermore, changes in job content have resulted in a need for a multi-skilled and adaptable labour force (Pickworth 1989:1; Gazda *et al.*, 1987:15). The planned expansion of the higher education system, stresses the increasing importance of high-level skills and human resources for social and economic development needed in the South African economy (NPHE 2001). The collective knowledge, insight and ingenuity of an informed staff will make the difference in managing the change in organisations within a global competitive context (Weeks 1998:21). A national priority in South Africa is the development of top-class business and managerial capacity for further economic development (Meyer 1999:20). Training, development and multi-skilling will, however, acquire a new meaning within a global competitive context. The economy of a country relies to a large extent on the level of education of its people (Du Plessis *et al.*, 1996:75). For a growing economy, South Africa needs internationally competitive businesses and for that the qualities needed are more knowledge and skills. "A learning nation has the prospect of becoming a winning nation." Van der Colff (2001:28-29) states, that the changes faced by companies in the new millennium will definitely have an impact on educational institutions.

Problem

The rapid changes brought about by technology most certainly affect office management (Holtzhausen 2001). More than ever before, the world is seen as a global village or global office (Bester 2000:16). This influences the requirements set by commerce and industry for office managers. It is important to understand the complexity of this new global office, and to be able to manage the technology that drives and maintains this global office. These requirements are important in the education, training and development of competent office managers.

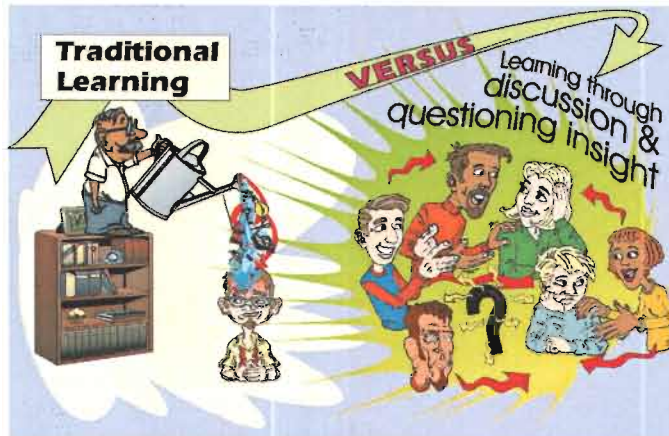
One of the competencies of office managers, required by commerce and industry is the administration of information. Hutchinson and Sawyer (2000:1.4) emphasise the importance of managers not only becoming knowledgeable about and being skilled in the use of computers, but also of being "information literate" – that is, to be able to find, analyse, and use information in one's career. As a result of the increase in complexity and versatility in computer technology and software, the administration of information has changed dramatically. According to Holtzhausen (2001), the primary role of office managers is to be competent in managing information and technology, as well to be efficient at as problem-solving regarding office computer support systems.

## 1.2 RESEARCH QUESTION

As mentioned above (§1.1), education, training and development are primary requisites for corporate success in South Africa, as changes in job content have resulted in a need for multi-skilled and adaptable office managers. The purpose of this study, is to determine the profile of a multi-skilled and adaptable office manager. It is contended, that this would imply a paradigm shift from secretary to office manager in terms of status. Such a paradigm shift may require a transformation of the information administration curricula at institutions of higher education.

Action Learning (AL) is learning from concrete experience and critical reflection on that experience (Zuber-Skerritt 1993:45; 2001:1). This is done through group discussion, trial and error, discovery and learning from and with each other. Learning is both programmed knowledge and questioning as illustrated in figure 1.

**FIGURE 1: TRADITIONAL LEARNING VERSUS AL (ZUBER-SKERRITT 2001:12).  
INTERPRETED BY L. VERMEULEN**



Based on the above, the following objectives are formulated.

- 1.2.1 To investigate the knowledge, skills, values/attitudes for a competent office manager, and to prove the appropriateness and relevance of this type of education.
- 1.2.2 To contribute to the development of an understanding of the skills and competencies that have to be developed within office management education, including curriculum development based on the needs of commerce and industry.
- 1.2.3 To provide a profile for office managers and to develop a model for the training of office managers through the use of A/L.
- 1.2.4 To determine whether there will be a paradigm shift from secretary to office manager in terms of status.

## **1.3 DEFINITION OF TERMS**

### **1.3.1 Office Manager**

An office manager is a person who manages personnel, assists employers, implements the vision and mission of the organisation and does general office administration (Anon. 2001a:24). In the new technological age, the role of the office manager is to be a partner in the management team as well as to manage all information (Holtz-



hausen 2001). Henning (2002) states, that an office manager is a person with leadership skills, experience and initiative, someone who is computer literate and competent. Office managers plan the work of office staff, interview and hire new staff, resolve office problems, and perform many administrative duties (Anon. 2003a:1). The job description of an office manager includes the co-ordinating of various office support services, purchasing and facilities management (Anon. 2003b:1). Strong communication skills and accounting knowledge are required.

### **1.3.2 Secretary**

A secretary is a person who handles administration, correspondence, client liaison, the employer's diary, and one who attends meetings and types reports (Anon. 2001b:19). According to Henning (2002), a person who starts a career is a secretary, an assistant with less experience, is computer literate and competent. A secretary performs clerical tasks in an office, deals with information, creates documents, conducts research on the internet and records the findings in reports, and may also manage projects (Anon. 2003c:1). He/she is a master of office skills, is responsible, exercises initiative and judgement, and makes decisions (Anon. 2003d:3).

### **1.3.3 Paradigm shift**

According to the NSOED (1993:2093) the meaning of a paradigm is "a pattern." Barker (1989) states, that a paradigm is common; we have them in all aspects of our lives.

Kuhn (1970:viii) defines a paradigm as "... universally recognised scientific achievements that for a time provide model problems and solutions to a community of practitioners". Kuhn's conception can be operationalised as follows: a paradigm is a philosophical scheme of thought or a theoretical formulation on a subject which relates to a set of concepts, categories, relationships, values and methods which are generally accepted by a community of practitioners at any given period of time.

According to Knill (1991:52), the term "paradigm" originates from the Greek root "paradigma" which means "a model". This is probably why, in established usage, a paradigm is often accepted as a model or pattern. Paradigms provide the foundation for knowledge, understanding and solutions to problems. They deal with fundamental issues and reach the very core of things (Söhnge 1994:5). According to Barker, a

paradigm shift means going back to zero – past successes mean nothing. According to the Synonym Finder (1986:1103), the word “shift” means “change”.

A paradigm shift occurs when, as a result of research and ongoing debate, the major ruling paradigm is annihilated and scientists begin to accept another philosophical scheme of thought or frame of reference (Arjun 1998:25).

#### **1.3.4 Administration**

According to the CCD (1989:15), administration means the management of the affairs of an organisation, such as a business or institution. According to the Microsoft Bookshelf Basics (2002), administration means paper work or staff work.

#### **1.3.5 Information**

According to the CCD (1989:641), the meaning of information is an office or agency providing information, the meaning given to data by the way it is interpreted, and another word for “data”. The Microsoft Bookshelf Basics (2002), explains information as communication of knowledge, transmission of knowledge, dissemination, diffusion, information technology, and computerised information.

### **1.4 SCOPE AND DEMARCATION OF FIELD OF STUDY**

This research project will focus on the identification of the profile of a multi-skilled and adaptable office manager as specified by Pickworth (1989:1), as well as the training and development of office managers. As this research project will focus on the requirements of commerce and industry i.r.o. competent office managers, important stakeholders include industry, academic practitioners, personnel agencies, and development consultants. The temporal scope of study is to direct training at the beginning of the second millennium for a multi-tasking future and to produce multi-skilled professionals (Valente 2001b:7). According to Meyer (1999:20), proper education and training are essential both for the development of business in the country and for the economic development in South Africa. Thus, further investigation will be conducted into how training is performed at higher education institutions in South Africa. The Vaal Triangle Technikon will serve as a reference point in this regard. Sur-

veys will also be done in commerce and industry in order to investigate the profile of office managers.

## **1.5 THE NEED FOR THE STUDY**

As explained in (§1.1), office management is affected by rapid changes brought about by technology. More than ever before, the world is seen as a global village or global office (Bester 2000:16). This will also influence the requirements for office managers set by trade and industry. The primary role of office managers is to be competent in managing information and technology, as well as problem-solving regarding computer support systems in the office (Holtzhausen 2001).

As mentioned previously (§1.1), these requirements are important in the education, training and development of competent office managers. What office managers should be able to do in future, has a direct impact on what is needed in office management education now. The Vaal Triangle Technikon, as well as other educational institutions, has to balance the needs of the learner, industry and the Technikon itself. The need is not only to train learners to have knowledge, but also to think and to manage information in an office. In an attempt to develop an understanding of the skills and competencies that have to be developed within the office management and technology curriculum, this research project is undertaken to investigate what knowledge, skills, and values are required for office managers and how to address them. With the ever-increasing demand for office managers, it is important to look at the content and context of this type of education.

The Vaal Triangle Technikon (2000:4) declares in its Mission Statement that the Technikon "... is committed to the development of higher education through excellence in teaching and learning by developing entrepreneurial, technological and cognitive skills". This research project will contribute to the curriculum development of Information Administration I, II, and III and towards the achievement of the mission of the Vaal Triangle Technikon.

## **1.6 RELATED LITERATURE**

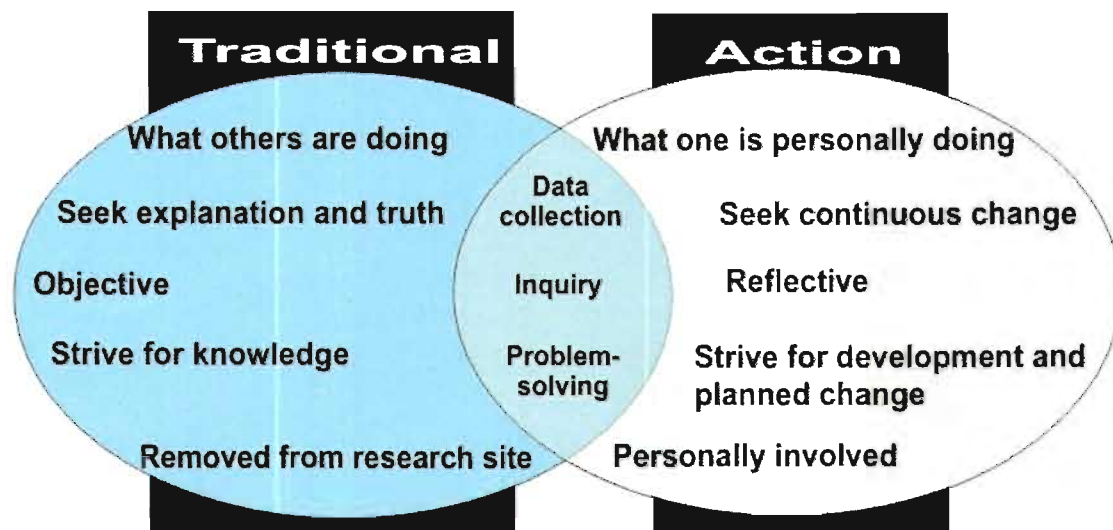
Literature focusing on the need for the training of office managers, was reviewed. The databases consulted, include: Innopac Goldfields Library Vaal Triangle Technikon, MCB-Online, EbscoHost Online; and NEXUS.

A review of the NEXUS database revealed that to date, no research has been conducted on a paradigm shift from secretary to office manager.

## 1.7 METHODOLOGY

The research methodology of both Action Research (AR) and traditional research is followed (quantitative and qualitative). For the quantitative method, questionnaires provided the measuring instrument. It was used for Technikons in South Africa as training institutions and for commerce and industry who determine the needs for training institutions. For the exploratory descriptive data analysis, the statistical programme for the social sciences (SPSS) and Excel were used. The following figure illustrates both research methods.

FIGURE 2: TWO KINDS OF RESEARCH. (SCHMUCK 1997:21). GRAPHICS: D. WILSON



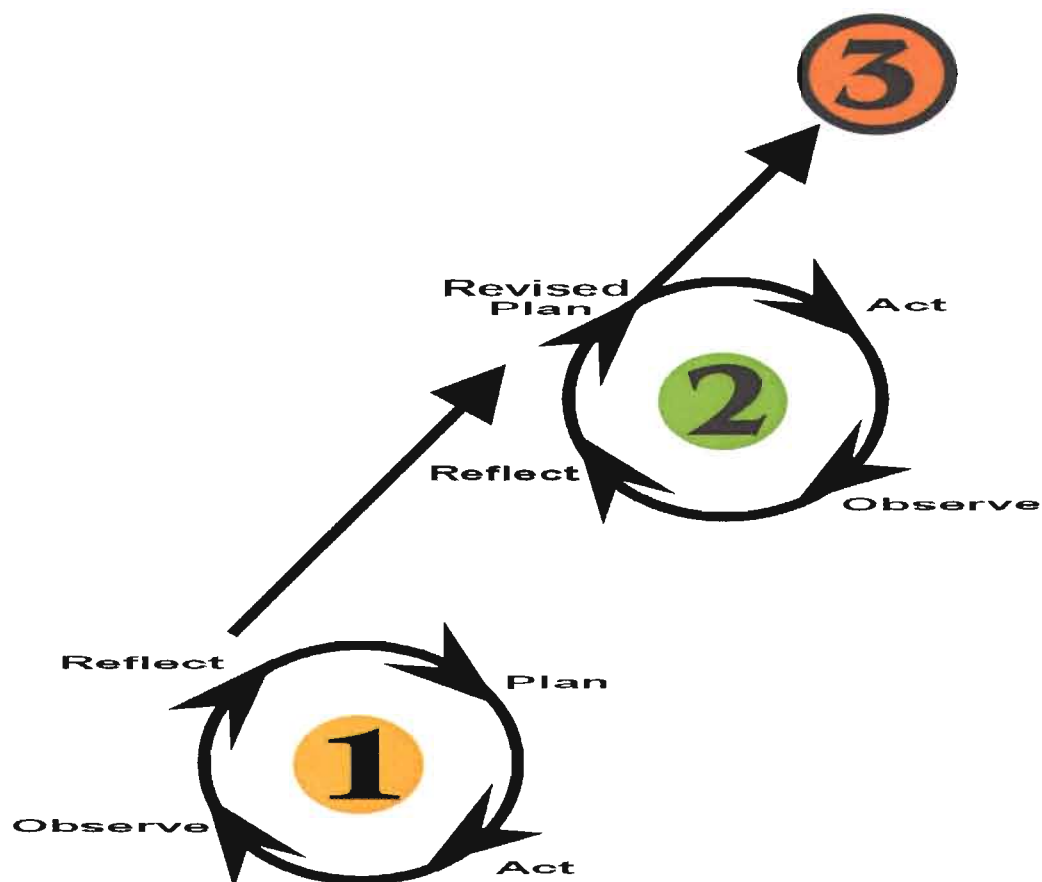
According to Bawden and Zuber-Skerritt (1991:81), action researchers not only aim to learn from their own and each others' work, but also to improve it and to change their own situations and the conditions in which they work. Action research enquires about truth, information, or knowledge (Schmuck 1997:28). It consists of self-reflective inquiry, as well as of inquiry-oriented practice. Thus, this inquiry is internal and subjective, and external and data based. In order to develop an understanding of the skills and competencies that need to be developed within the office management and technology curriculum, this research project was undertaken to investigate what knowledge, skills, and values/attitudes are required for office managers. AR will continue to play an important part in Research and Development programmes, because it is an appropriate methodology and process for (re)creating change, innova-

tion, leadership and personal, professional and organisational learning (Zuber-Skerritt, 2001:1). AR is located in the social sciences and deals with human beings, groups of people, organisations or societies.

AR is practical, because the results and insights gained from the research, are not only of theoretical importance to the advancement of knowledge in the field, but also lead to immediate practical improvements during and after the research process (Zuber-Skerritt 1991:xii; 1993:47; Atweh *et al.*, 1998:22).

The AR process is a spiral of AR cycles, each consisting of a plan, action, observation and critical reflection phase (Bawden & Zuber-Skerritt 1991:81; Atweh *et al.*, 1998:21-22; Carr & Kemmis 1986:162; Pinchen & Passfield 1995:13). For this AR project, it needs only to progress through only one planning, acting, observing, and reflecting cycle (Zuber-Skerritt 2001:9).

**FIGURE 3: ACTION RESEARCH SPIRAL (ZUBER-SKERRITT 1995:13). GRAPHICS: D. WILSON**



The following qualitative research methods and techniques will be used (Zuber-Skerritt 1998;9; Glesne 1999:31).

- The case study
- Individual interviews (focused, semi-structured)
- Surveys (open-ended questionnaires)
- Focus group technique
- Reflection diary/journal
- Team building and project planning, including SWOT analysis
- Figure 8 (for project planning, including SWOT analysis)
- Literature review

For project planning, the figure 8 model is used. This emphasises the importance of creating a vision and analysing the context before planning the improvement of practice or embarking upon premature action planning (Zuber-Skerritt 2000:42-50).

**FIGURE 4: THE PROCESS OF PROJECT DESIGN AND MANAGEMENT (ZUBER-SKERRITT 2000:43). GRAPHICS: D WILSON**



## **Phase 1: Creating a vision and analysing the context**

- Set up a vision by asking the following questions:  
What impact will this project have?  
What will be different when the project is completed?  
What will the project produce as a result?
- Perform a stakeholder analysis by listing all those who will:  
have an impact on the project;  
have an interest in the project; and  
be affected by the project.
- Perform a SWOT analysis by considering the factors that are of strategic importance to the project: strengths, weaknesses, opportunities, threats.
- Draft a resource inventory by listing the resources available for the project: people, material, financial and physical, personal attributes.

## **Phase 2: Action Plan**

The action plan comprises the following.

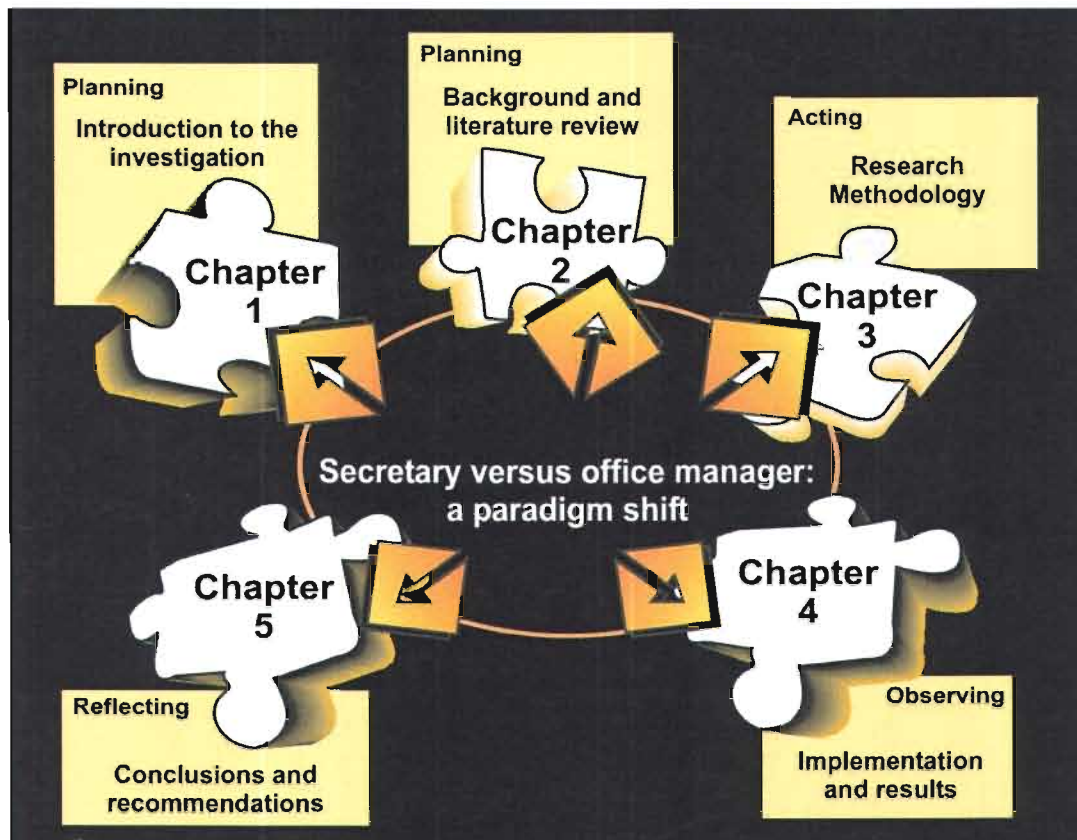
- Describe the scope of the project
- Define project goals
- List the areas in which results will be achieved if the project is successful
- Determine the measurements of outcomes
- List possible activities to achieve the project goals
- Determine which of the events are the most important for achieving the goals
- Create an event track to ensure that the action plan is comprehensive
- Do progressive evaluation

AR involves triangulation (Ertmer 1997:169). Ertmer defines data triangulation as attempts to gather observations by using a variety of sampling strategies in order to ensure that a theory is tested in more than one way. In this research project, data triangulation will be used when data are gathered from different settings, times, locations, and levels (individuals, groups and whole organisations). Companies from trade and industry, as well as personnel consultants and Technikons in South Africa, are involved.

As previously mentioned (§1.7) questionnaires (structured and open-ended), a case study, interviews, and focus groups will be used to assess the outcomes of this study. The contents of the questionnaires will focus on the commerce and industry requirements for competency in office management.

## 1.8 CHAPTER DIVISION

FIGURE 5: PLANNING OF CHAPTER DIVISION. GRAPHICS: D. WILSON



## 1.9 SUMMARY

This chapter provides an overview of the research title and the problem to be investigated, the need for the study, as well as the research methodology that will be applied. The importance of increased knowledge and skills in office management education, relates to the important role that commerce and industry play in the development of a profile for office managers. A proposed framework for each chapter is provided and chapter 1 deals with the first cycle in the spiral of AR, namely planning.

Chapter 2 will explore the background concerning the profile of the secretary/office manager, the title, training, and changes affecting the secretarial profession.





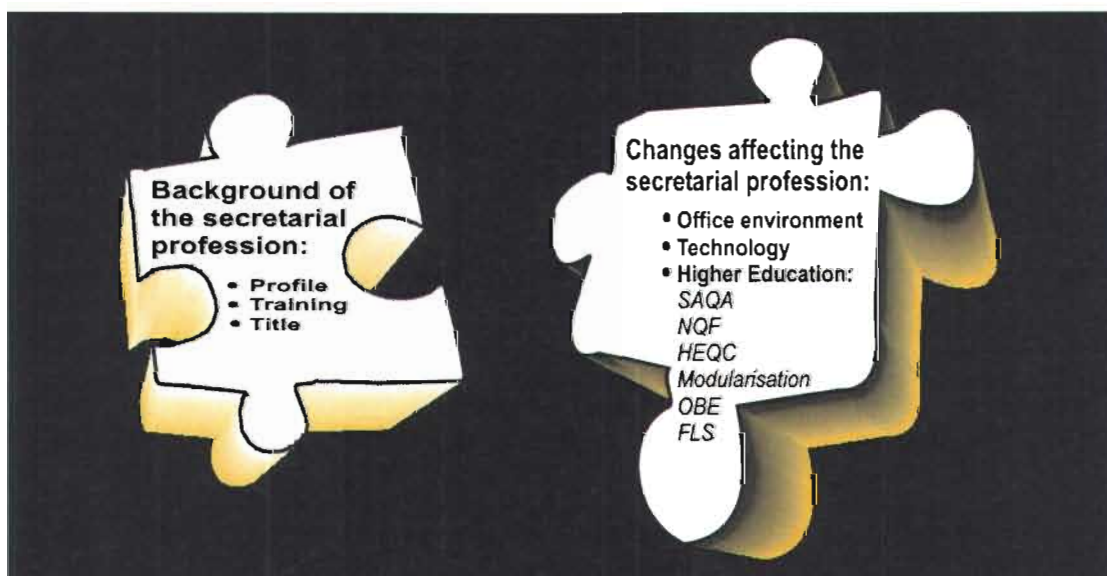
## BACKGROUND AND LITERATURE REVIEW

### 2.1. INTRODUCTION

In the previous chapter a vision for the necessity for this study was outlined. With the change in technology, the role of the office manager has changed, because the concept of the office itself has changed. As in chapter 1, this chapter will continue with the planning cycle of AR. The objective of investigating the beliefs, knowledge, skills values/attitudes for a competent office manager, will be addressed in this chapter. To do so, it is also necessary to address aspects like the profile of the secretary, training, title, changes in the office, changes in technology and changes in Higher Education.

The following perspective is given to illustrate the aim of this chapter and how it will be done.

FIGURE 6: PLANNING OF CHAPTER. GRAPHICS: D. WILSON



For the purpose of understanding what knowledge, skills and values/attitudes mean, the following clarification is given.

### **2.1.1 Knowledge**

According to the CCD (1989:698), the meaning of "knowledge", is the facts or experiences known by a person or group of people, specific information about a subject, familiarity gained by experience or learning.

In the field of knowledge management, three characteristics are mentioned, namely data, information and knowledge. Data consists of simple facts, e.g. ideas, figures, lists of tasks etc., and when analysed and interpreted, it becomes information. When information is used as a basis for understanding and solving problems, it becomes knowledge. The understanding leads to intelligence that uses knowledge to achieve a goal; thus knowledge is recognised by organisations as a corporate asset (Veng Seng *et al.*, 2002:138-139). Helmers (1999:1) refers to knowledge as gathered information and experience which makes it possible to react to new situations by combining previous data and actions.

### **2.1.2 Skills**

The NSOED (1993:2882) explains "skill" as an ability to do something (especially manual or physical) well, to be proficient and to be an expert. To be skilled, is having or showing skill or practical ability and also to be highly trained or experienced where work requires such skills or special training.

Skill is also described as the proficiency on a specific task and is acquired through education, training, and experience, while it is developed through practice and performance feedback. Basic skills in the workplace include reading, writing, arithmetic, mathematics, listening, and speaking. Thinking skills include creative thinking, decision-making, problem-solving and reasoning.

Interpersonal skills in the workplace include communicating, problem-solving, maintaining relationships, upholding standards, and handling pressure (Hogan 1998:518).

### **2.1.3 Values/attitudes**

According to the NSOED (1993:3542-3543), "value" means the worth, usefulness, or importance of a thing. To consider of worth or importance, have a high opinion of and to be concerned about. The new CCD (1989:76), explains "attitude" as the way a person views something or behaves towards it, more or less in an evaluative way.

Values are seen as a set of core beliefs, learned early in life that set a standard for individuals to determine whether something has value or should be preferred. The rest of peoples' belief systems is organised around this structure of beliefs. In organisations, employees bring values with them and can influence those of the organisation (Ravlin 1998:598).

## **2.2 PROFILE OF A SECRETARY**

The role of the secretary originates from the need for a prominent person who could be entrusted with confidential matters and could act as an assistant for a superior (Anon. 2003d:1, 2). The word "secretary" comes from the Latin word that means "secret".

### **2.2.1 Blueprint for the secretarial profession**

The first edition of the Blueprint for the secretarial profession came to light in 1995 and the second edition in 2001, with the mission to uplift the image of the secretarial profession.

The Blueprint records all advances on the secretarial profession, as well as promotes and assesses all impacts on this profession and will be the voice for this lifelong profession, making suggestions in terms of policy and direction (Valente 2001a:2).

The following describes the profile and duties of a secretary (Valente ed. 1995:18-20; 2001a:16-18).

- The secretary, among others, takes responsibility for the administrative work load; sees to the efficient work flow and effective office procedures; implements policies and procedures; applies good working relationships in the office to customers and suppliers;

- keeps a diary and schedules appointments; receives telephone calls and visitors and refers them accordingly; sets up business itineraries and arranges travel requirements;
- acts in the place of the manager during his absence, by using initiative and judgement for the smooth running of the office;
- takes and transcribes notes;
- types written or copied material;
- handles incoming mail by sorting, reading and arranging for action;
- creates correspondence and reports for signature;
- prepares communications outlines orally or in writing;
- prepares information for meetings, projects and reports;
- edits and organises material;
- maintains filing and records management systems, as well as office flow procedures;
- co-ordinates and arranges meetings and conferences; takes minutes, transcribes and distributes;
- supervises or hires employees; makes recommendations for purchase of supplies and equipment; keeps the budget and expense account records, financial records, and confidential files;
- maintains procedures manually for duties; and
- performs any other duties that become necessary (Valente ed. 1995:19).

According to Anon (2003d:2), secretaries do not only type correspondence for the superior; they see to the correspondence, plan meetings, organise data with different software packages, interact with clients and the general public, supervise the office and staff, control purchasing, and train staff.

In the Blueprint (1995) the title and job description of the office manager is described under the following headings: position function, position authority, major duties, and qualifications (Valente ed. 1995:20-21).

## **Position function**

The office manager requires secretarial, operational, and supervisory skills in order to perform administrative duties. Business goals and objectives should be planned and resources identified so as to accomplish the goals. The responsibilities will include directing and supervising clerical and secretarial personnel, doing routine management functions, conducting department affairs, hiring and training staff, and creating a productive and pleasant working environment.

- **Position authority**

The office manager performs judgement and initiative in the performance of job responsibilities. The authority is given for any action necessary to carry out assigned responsibilities, as well as supervisory authority in matters such as hiring, promoting, disciplining or terminating duties of office employees.

- **Major duties**

Supervisory duties include: hiring and training of staff, delegating and monitoring work assignments; reviewing job performances; and making disciplinary or commendation recommendations. The administrative duties include: setting up operational procedures for consistent work flow; co-ordinating meetings, conferences, and appointments; creating and replying to office correspondence; note-taking and transcription; creating a filing system; conducting research for special projects and reports; and receiving calls.

- **Qualifications**

The office manager requires knowledge of business English, spelling, punctuation, and arithmetic. Knowledge of modern office practices and procedures are also essential. Secondary school education, including courses in typing and shorthand, is needed. Four years of secretarial experience, including advisory experience or a combination of training and experience, is required.

Anon (2003e:1) indicates the following requirements for the position of office manager.

- Integrity and trust
- People skills
- Computer skills
- Verbal and written skills
- Telephone etiquette
- A positive attitude
- Sound organisational abilities

The following knowledge and skills are needed by office managers (Anon. 2003a:3-4).

### **Knowledge**

- Administrating and managing operations of a business
- Customer and personal services
- General office work
- The meaning, spelling, and use of the English language
- Activities of the human resource department
- Teaching and training methods
- Arithmetic, algebra, geometry, and statistics
- Economics and accounting

### **Skills**

- To speak and write clearly
- Motivate, direct, and manage people
- Numerical and mathematical abilities
- Problem-solving
- Willingness for change
- Good listening
- To analyse and apply solutions
- To be pro-active
- To be creative
- To be focussed
- To be able to memorise information
- Identify and reach goals

Secretarial profiles for the office manager, personal assistant, executive secretary, and senior secretary were documented by Kondowe (2003) in which the knowledge, skills, values, duties and responsibilities are outlined. (For more detailed information, refer to Annexure H). Kondowe defines the knowledge, skills and values for an office manager as follows.

- Business knowledge
- Business English
- Business ethics
- Business dress code
- Interpersonal skills
- Leadership skills
- Business communication skills
- Team player
- Information research
- Honesty/trust
- Integrity

In 1997 a survey was conducted by Valente ed. (1997:16) on the secretarial profession and secretaries from all over South Africa responded. The following table indicates the responses from secretaries.

**TABLE 1: SURVEY OF THE SECRETARIAL PROFESSION (VALENTE ED. 1997:16)**

<ul style="list-style-type: none"> <li>• <b>What do secretaries do with their day?</b></li> <li>82% Take dictation or get documents from the boss in draft form and put into final form.</li> <li>82% Liaise with clients.</li> <li>79% Have daily meeting with boss.</li> <li>74% Handle calls.</li> <li>70% Make time to plan own work.</li> <li>49% Make time to plan boss's day.</li> <li>• <b>What work do secretaries do in general?</b></li> <li>85% Do own faxing.</li> <li>82% Co-ordinate functions.</li> <li>75% Do all travel bookings.</li> <li>74% Generate own correspondence.</li> <li>70% Prepare &amp; distribute Agenda &amp; Minutes.</li> <li>69% Do research.</li> <li>60% Work on databases.</li> <li>56% Control boss's diary.</li> <li>54% Supervise staff.</li> <li>53% Work on presentations (graphics/DTP).</li> <li>48% Do filing.</li> </ul>	<ul style="list-style-type: none"> <li>• <b>How do secretaries enjoy the various aspects of their work?</b></li> <li>65% Document layout.</li> <li>65% Organising and co-ordinating.</li> <li>60% Typing.</li> <li>59% Decision-making.</li> <li>52% Planning and prioritising.</li> <li>52% Making travel arrangements.</li> <li>52% Diary management/meeting with boss.</li> <li>46% Telephone work.</li> <li>44% Client handling.</li> <li>42% Setting up meetings/minutes.</li> <li>42% Research.</li> <li>38% Supervising.</li> <li>38% Handling suppliers.</li> <li>32% Ordering and buying.</li> <li>• <b>Where do secretaries see most challenges coming from?</b></li> <li>64% Demands no longer appropriate to the job.</li> <li>61% Situations they have not been trained to handle.</li> </ul>
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36% Attend meetings.	51% Having to cope with work and family demands.
56% Liaising with suppliers. Maintenance and repair.	41% Changes to the way work is done.
• <b>What resources do secretaries have and (or) use?</b>	26% Technology.
85% Fax.	• <b>How do secretaries see themselves?</b>
75% Printer.	97% Give instructions clearly.
66% Filing units in office.	96% Communicate well on the phone.
38% Dictaphone.	91% Are self-confident & confident about work.
22% Internet.	90% See themselves as professionals.
• <b>Do secretaries have authority?</b>	86% Interface effectively with customers.
89% To create own layout of documents.	85% Use praise to motivate others.
73% Make office management decisions.	84% Make things happen for the boss.
69% Order supplies within a budget.	84% Believe they are seen as professionals.
54% To supervise staff.	
48% Co-ordinate and organise projects.	

In addition to the above results, the following comments were made about the role of the secretary in an office (Price 1997:18):

## Challenges

The following challenges are to be noted.

- Working with people.
- Creating a balance between their values for the work and family life.
- Remaining astride of technology and equipment.
- Affirmative action processes and responsibilities.
- Being part of the team.
- Keeping up with changes and crises.
- A need for personal creativity and energy resources (mentally, physically, socially, emotionally, culturally, spiritually).
- Flexibility and assertiveness.
- Professionalism and excellence.

## Areas that need attention

- Improvement of management styles to be able to manage the office.
- Taking care of the needs of clients.
- Greater productivity towards effectively competing in the global market.
- Self-control, toughness and pro-activity are necessities in this profession.

## Areas of performance

- The team work and project management have added value to the team.
- Productivity, efficiency and effectiveness are part of the secretaries' performance.

(Price 1997:18)



The job description of an executive secretary of a secretarial consultancy company refers to an average day of a secretary and the detailed information is outlined in Annexure I. The following job description is given of a secretary in a corporate division of company X: The secretary should "... function as support to management by organising diaries, screening telephone calls, taking messages, typing, handling confidential information, filing, booking travel arrangements, maintaining all general administration tasks and giving training when required." (Refer to Annexure J).

The following shifts towards the challenges experienced in the new office with the ever-increasing demands and changes in technology, have been made within the 1995 Blueprint.

- Technology, e-mail, internet and more programmes are now used.
- Secretaries do more research.
- Secretaries have more authority and responsibility in decision-making and management in the office.
- Secretaries make more decisions.
- They are more involved with liaison, supervision and teamwork. (Price 1997:18).

The survey revealed the following results on how secretaries see themselves, what qualities they believe they have, and what they are skilled in.

**TABLE 2: COMMENTS ON SURVEY RESULTS (PRICE 1997:18)**

<b>Secretaries' personalities</b>	<b>Secretaries' skills</b>	<b>Secretaries' functions</b>
Dependable Productive Focussed Assertive Proactive Professional Confident Decision-makers	Attitude management Sense of direction Autonomy People skills Communication/delegation skills Ability to cope with pressure Self-respect Creativity Problem-solving skills Listener skills Interpersonal skills Capacity for hard work	Creating documents Layout of documents Presentations Diary & programme management Decision-making Pro-active planning Strategic thinking

In 1998 a South African study was conducted by Valente ed. (1998:24-25), to determine the need for typing and shorthand speeds, as well as to find out more about the current office realities.

Part one of the questionnaire covered the type of documents produced by secretaries, as well as the kind of software and the methods used for distribution in an office. Part two of the questionnaire tested the production speed in which documents are completed by using the software mentioned in part one and part three determined the speed one needs to take down notes.

The outcome of the survey (part one) on the type of documents produced in an office, were the following: letters, memos, circulars, manuals, speeches, press releases, newsletters, letters of appointment, agendas, minutes, reports, annual reports, proposals, pamphlets, booklets, marketing brochures, invoices, statements, tenders, quotations, application forms, agreements, and contracts (Valente ed. 1999:28).

The results on part two, the actual time needed to complete a document, is not the most important factor anymore, due to the interruption factor (Valente ed. 1999:28). What is of most importance, is attractive layout and accuracy. High typing speed is still viewed as important to have, but is not a realistic view of the actual speed in which documents are produced. Typing speeds in real work situations for junior secretaries are 35 – 45 wpm and 45 – 50 wpm for senior and executive secretaries.

Part three determined the speed for note-taking. Very few secretaries use shorthand; others make use of their own abbreviated methods. Otherwise, dictation is done on cassette or by using a laptop (Valente ed. 1999:28). The required shorthand speed for junior secretaries is 35 - 45 wpm, 70 w.p.m. for senior secretaries and 90 wpm for executive secretaries.

Some other observations that came to light, is the shift from typist to being a presenter of documents. In today's office the emphasis is on accuracy and perfect layout of documents rather than on the actual typing speed (Valente ed. 1999:28).

**The survey on secretaries recommends the following.**

- They ought to enrol for computer training and business writing courses
- Training institutions should be aware of changes and train secretaries accordingly
- Training should incorporate the importance of document layout skills
- Change copy typing to presentation of own letters, reports, etc.

- Make use of the holistic approach in learning: business English cannot be separated from typing
- Secretaries know how to use the internet and intranet
- Secretaries also know the usage and language of e-mail
- The need exists that secretaries learn the advanced software packages, not only basic working skills (Valente ed. 1999:28).

**The following skills are needed in order to fulfil in the needs of secretaries.**

- Research know-how
- How to handle crises, criticism, difficult people, teamwork
- Listen and think
- Understand different cultures
- Productivity and commitment
- Cope with conflicting demands and deadlines
- Speak clearly and confidently
- Know how to take proper notes and messages
- Know and practise etiquette
- Do bookings at hotels; manage air travel requirements
- Organise a function
- Checking and double-checking for accuracy
- Managing and prioritising workflow (Valente ed. 1999:28).

A job description for a senior secretary at company Y, includes the following (Refer to Annexure K).

- Office management. Responsible for locking and checking quality of cleaning of offices as well as general maintenance.
- Customer service. Receiving visitors and handling all enquiries satisfactorily.
- Secretarial duties. Diary management, organising meetings, making appointments, and arranging social functions, typing memorandums and letters, compiling presentations, arranging travel and accommodation, conferences/workshops, managing e-mail and updating departmental organisation charts.
- Supporting services. Handling cash, cheques, and claims.

The principal duties of a private secretary in company Z are the following.

- Doing all typing for the specified departments
- Checking calculations, spelling, and data
- Good record-keeping and communication
- Co-ordinating of all incoming and outgoing mail
- Controlling of telephone calls
- Co-ordinating meetings, appointments and functions
- Acting as secretary for departmental meetings
- Distributing current literature citations
- Managing hotel bookings for company visitors (Refer to Annexure L)

Companies expect from their administrative staff "to multitask" (Anon., 2003b:3). Technical skills play an important role in the office and it is particularly important for secretarial staff to have experience in Microsoft Office, which includes word processing, spreadsheet and presentation software. Internet research abilities and effective business writing skills are highly valued.

## **2.3 TRAINING**

According to Goldstein (1993:573), training programmes are planned learning events, which specifically relate to the work environment. From this point of view, training can be defined as a systematic gaining of skills, rules, concepts, or attitudes that result in improved work performances. The result of well-planned training, is to provide the job market with skilled people who can perform well and can be promoted in new situations.

In preparing for a future career in the secretarial profession, the learner is largely responsible for her own training to keep up to date with technological changes in the office environment (Robinson 1997:6). Steyn and Zikalala (1997:6) agree, that further education after grade 12 is essential towards ensuring a future with new challenges and opportunities in the secretarial profession.

Barr (1995) states, that in the Learning Paradigm, the purpose of an institution is not to transfer knowledge but to create environments and experiences that will lead learners to make discoveries and to solve problems. The Learning Paradigm does not limit institutions to only one way of learning but continuously identifies more effec-

tive learning technologies which are developed, tested, implemented and assessed. The aim of the Learning Paradigm, is to improve the quality of learning.

Hutchinson and Sawyer (2000:13.3) stress the importance of multimedia in education and training. The multimedia contribute to learning by stimulating class discussions, conducting student research, promoting teamwork and ensuring active participation. Educational multimedia has the benefit for learners to chose when and where they want to access training. Other resources include multimedia reference material, electronic textbooks, course supplements, on-line lecture notes, interactive testing, and simulations.

Valente ed. (2001:9) states, that trainers and training institutions should revisit their curricula in order to ensure that training is done in relation to the workplace and existing office realities.

### **2.3.1 Background and origin of information administration as a course offering at the Vaal Triangle Technikon**

The institution analysed in this study, is the Vaal Triangle Technikon (VTT). In a report from the South African Post-Secondary Education (SAPSE 151) of 1985, the following explanations were given in regard to secretarial training.

- **Administrative and office services**

Administrative and office services is the study of techniques and procedures for collecting, classifying, processing, computing, communicating, reporting, storing, and retrieving information in an organisation.

- **Administrative procedures**

Administrative procedures comprises the study of principles and procedures of office administration, which includes the organisation of the office, office design, office procedures, personnel administration, employee training, records management, work simplification, management of accounting activities, and data processing functions.

## **Secretarial procedures**

Secretarial procedures is the study of principles and procedures involved in the application and integration of secretarial skills in dictation-transcription, records, management, communication, telephone usage, research and the use of reference materials, as well as human relations.

- **Shorthand and transcription**

Shorthand and transcription is the study of principles and techniques of recording dictation in symbols or other abbreviated forms and the conversion of these abbreviated forms into typewritten documents by using acceptable formats and correct spelling, punctuation, and grammar.

- **Legal secretarial services**

Legal secretarial services is the study of the special knowledge and skills needed by secretaries employed in legal firms, courts, or other situations related to the legal profession and the application of secretarial skills to legal office settings.

- **Medical secretarial services**

Medical secretarial services is the study of special knowledge and skills needed by secretaries employed in medical practices and hospitals, and other situations related to the medical profession and the application of secretarial skills to medical practice settings.

- **Typewriting**

Typewriting is the study of the knowledge and skills necessary to operate a typewriter and to produce personal and business correspondence and documents.

- **Word processing**

Word Processing is the study of knowledge and skills needed to operate automated typing and transcription equipment, including the planning and production of correspondence, reports, and other documents.

In 1984 the following programmes were offered at the VTT: The National Certificate, with a minimum formal duration of one year, the National Higher Certificate, with the minimum formal duration of two years, and a Diploma, with the minimum formal duration of three years. The programme provides for the following fields of study: Secretarial, Business Computers, Home-making, Legal Practice, Medical Secretary, Private Secretary, and Public Relations which all offered the main subject typing, with a minimum typing speed of 35 words per minute (w.p.m.) for the certificate, 45 w.p.m. for the higher certificate, and 55 w.p.m. for the diploma. Other compulsory and additional offerings included, were financial accounting, audio typing, office administration, speech and deportment, communication, mercantile law, economics, computer operating, home-making, legal practice, human relations, elementary medical knowledge and ethics, "snelskrif", shorthand, and secretarial public relations. A total of fourteen offerings were needed to qualify for the diploma at the end of three years (SAPSE 151:1985).

In January 1990 the subject typing was replaced by typing technology, which consisted of three modules namely typing techniques, audio typing, and word processing. For the National Diploma Secretarial: Executive Secretary, the following offerings were compulsory: typing technology I, II, III; office administration I, II; "snelskrif"/shorthand I, II; office administration III or "snelskrif"/shorthand III; communication in Afrikaans and English. The following offerings were optional: office administration III; secretarial public relations; tourism techniques I; human relations; the art of entertaining; mercantile law I; economics I; legal practice I; personnel management I; financial accounting I; "snelskrif"/shorthand I/II/III; computer operating. The total offerings for this diploma, were fourteen (DNE 1991:168).

In 1992 the name of the diploma changed to National Diploma: Business Administration and the main offering changed from typing technology to information administration. In 1996. the diploma changed to Commercial Administration and again in 2000 to Office Management and Technology, with the date of implementation in January 2003. Compulsory offerings for this diploma, are information administration I, II, III, business administration I, II, III, and communication I and II, with the following optional offerings: personnel management, mercantile law, financial accounting, and legal practice. A total of twelve offerings plus nine weeks experiential learning are needed to qualify for the diploma, which includes a choice of two offerings at level three and one offering at level two (CTP 2000:1).

The Bachelors (BTech), Masters (MTech) and Doctorate (DTech) degrees can also be obtained after having qualified for a diploma. The instructional offerings for the BTech degree, includes the following: labour and immaterial law, office administration: behavioural aspects, research methodology, business administration IV, and information administration IV (CTP 2000:75).

The National Diploma: Office Management and Technology, makes provision for learners without keyboard skills to qualify for a foundation certificate in keyboard skills. Learners who fail this course, will then extend the course with an extra year (VTT 2001:15).

### **2.3.2 Information administration and the use of AL**

The subject information administration with which the study is concerned currently, consists of two modules. Module 1 covers the theoretical aspects on how to become computer literate and computer competent, with basic knowledge on computer hardware and software, communications technology, information systems, information management, files and databases, multimedia and ethics. Module 2 is the practical application of the knowledge in a real office situation in which the application of different software packages, e.g. communications, word processing, spreadsheets, presentations and databases are implemented. Practical simulated office assignments form part of the practical tasks that learners complete during lessons.

Based on observations by the researcher during class tuition, learning problems were identified in both the theoretical and practical modules. The following identified problems, gave rise to the high percentage of failures in these modules.

- **Language**

The learners do not understand what they learn and do not understand the instructions given to them in teaching or in examination situations.

- **Traditional learning**

The learners learn the content but do not understand what it means.

- **Typing speed**

The actual typing speed for copy typing is too slow.

- **Accuracy**

The learners cannot deliver a faultless document.



- **Production speed**

The real time that is used to plan and type a document, is too slow.

- **Proofreading**

The learners do not have the skill to check for any typing or display errors in a document.

## **2.4 TITLE OF OFFICE MANAGER/SECRETARY**

As early as 1990 the traditional role of a secretary began changing towards one with more responsibilities and power, then moving towards the question of a new title for the new role. (Valente 1990:3; Borgelt 1990:34).

The name "secretary" still exists, but as a title, the word "secretary" is dead. In 1998 in the USA the PSI (Professional Secretaries International) changed its name to IAAP which means International Association of Administrative Professionals. Their official magazine changed its title from "The Secretary" to "Office PRO". In 1999, in the UK, "The Secretary's Letter" changed to "Secrets and Strategies for Office Professionals". In June 1991, the magazine "Career Secretary" changed its title to "Career Success" (Valente ed. 1999:29).

Anon (2003f:1) mentions, that in some firms the office manager may be called a secretary or receptionist. In other firms, the title "office manager" also suggests more responsibilities. Secretaries can be promoted to other positions with more responsibilities namely office manager (Anon., 2003c:3). A secretary is also known as an administrative assistant, office co-ordinator, executive assistant, and office manager (Anon., 2003d:3).

Even back in the nineties it was clear that with technology changes, the method of working in an office would also change. Other professionals started requesting that their titles be reviewed (personnel to human resources, airhostess to flight attendant, etc.). It is only a matter of time before secretaries start thinking alike (Valente ed. 1999:29).

It is further mentioned, that the word "secretary" is not appropriate for a forum, association, club, journal or for a conference. The trend worldwide is to use a title like Office Professional. In South Africa, the annual National Secretaries Convention (NSC), which is organised by Audio Word, uses only the lettergroup NSC and the

word "secretaries" are used to refer to a target market. Although changes are occurring more rapidly, it is predicted that the title "secretary" as used in this profession, will still be utilised before the title will become known as Executive Assistants, Admin. Assistants or Office Managers (Valente ed. 1999:29).

A problem area that was identified in the Blueprint (1995), for the secretarial and office administration profession, was the use of combined titles for the concept secretary. This is not the case in any other profession. There is a vital need for a title change as the title of managers also changed and this left the secretary without any status recognition (Valente ed. 2001a:62).

Other comments regarding the title, are from Valente (1997:17): "... from a moth-like status of limited recognition, role and functions, to butterfly status with the full competence of flying as office manager". De Meillon (2000:15) describes this profession as a continuous challenge which started as a low-profile assistant in the twentieth century office, to the role of a highly sophisticated information manager.

For the purpose of this study the title office manager will be used in the light of the present training done at the VTT, which uses that title.

## **2.5 CHANGES AFFECTING THE SECRETARIAL PROFESSION**

### **2.5.1 Office Environment**

Based on the previous statements of a new title for the concept secretary, it is obvious that with new technology changes the management of an office also changed respectively, thus adding further responsibilities. Managers in the 21<sup>st</sup> century are heavily burdened with work and responsibilities, and need a professional office manager to assist them as part of the team (Van der Merwe 2000:4).

From the nineties up to the 21<sup>st</sup> century, the office environment changed according to the advances made in technology. New and more responsibilities were added to the duties of an office manager, which lead to the role as team player in the management team.

Hutchinson and Sawyer (2000:11.2) redefine the workplace as a centre with the duties of "... handing employees laptop computers with modems, portable phones, and beepers and telling their staff to work from their homes, cars, or customers' offices - virtually anywhere." The virtual office, accompanied with its high-tech tools, forces intense changes in the way people work (Hutchinson & Sawyer 2000:11.2-11.5,11.24; Marquardt 1999:3). The following are some of the latest trends that change the way in which people work.

- **The virtual office**

The virtual office is essentially a mobile office where people can work from anywhere (§2.5.1).

- **Automation**

Automation is the combination of various technologies to reduce the manual labour in operating an efficient office environment.

- **Downsizing and outsourcing**

Downsizing means reducing the number of people working in an organisation. This leads to a change in the hierarchy of organisations and the staff are left with more responsibility to do all the work. The personal computer assists them in accomplishing their work.

Downsizing leads to outsourcing. Outsourcing means contracting businesses or services from outside to perform the work previously done by the company itself.

- **Total quality management (TQM)**

It is an organisation-wide commitment, to continuously improve the work and to satisfy the needs of the customers.

- **Employee empowerment**

Now employees are empowered to act and make decisions on their own, within the appropriate supervision.

- **Re-engineering**

Re-engineering is applied when radical changes in business processes are needed to achieve breakthrough results (Hutchinson & Sawyer 2000:11.3-11.5).

From the above, it is clear that these changes will also involve a change in the training, education and development of office managers, meaning quality training. Kozlowski (1999:29) supports this fact, by stating that office managers have become the main figure for supporting software and information in the office, with the main attention on supervisory/management skills, software, project planning, and communication.

Valente ed. (2001:4) states, that word processing, spreadsheets, databases, presentation and software replace the skills of typing, shorthand and telephone handling as used in the past. The emphasis is on life-long learning and mastering technical skills in new technologies. New developments lead to new challenges and opportunities for the secretarial profession. As a result of improved technology, tasks will be speeded up; there will be a measured cost-effectiveness, and the office manager will be empowered and made indispensable by mastering these technologies.

With a rapidly changing workplace also comes greater responsibilities for office managers (Anon., 2003g:1). The following suggestions could help to adapt to these changes.

- Become an expert in computer software. Be a master of software packages, e.g. word processing, spreadsheet, database, presentations, and scheduling software, navigating the internet, and gathering information via the World Wide Web.
- Accept the life-long learning challenge. Attend workshops, register for a degree, or improve your written and verbal communication.
- Plan conferences and meetings. Learn to organise meetings well through good room and site selection, the availability of audio visuals, and meeting arrangements.
- Become a teacher and leader. Make use of opportunities to improve teaching and leadership qualities.
- Become a communications centre. The quality and efficiency of administrative staff indicates the character of a business.
- Be an "information manager." Provide the information needed by managers by the maximum use of computerised data, as well as of hard copy records.
- Select and maintain office equipment. Stay abreast of the market to make the correct choices for your organisation.

### **2.5.2 Technology**

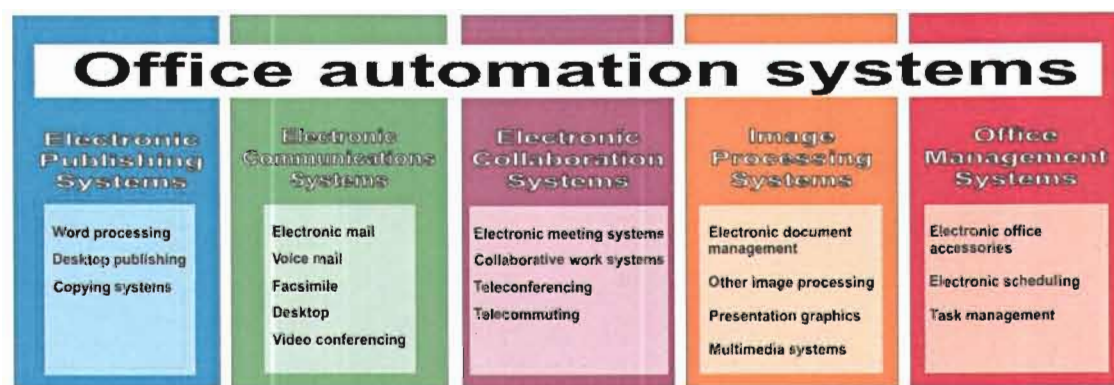
The resources an office manager had and used in the nineties were a computer, printer, fax, dictaphone and filing units. Today multi-skilled office managers are needed to run the new global and high-tech office. New roles and responsibilities will be part of the new office and the office manager will have to meet the administrative, as well as the managerial tasks. New technology, as well as the changing technological environment (§2.5.1), has an impact on the office manager and the business

world. Continuous change and mindshifts towards the latest technology, also make this a challenging profession and an even more empowered position to administrate information in an office. Van der Merwe (2000:4) states, that the office manager is the master of modern technology in the office.

The following information systems that combine various technologies used in an office, include the following (Hutchinson & Sawyer, 2000:11.19).

**FIGURE 7: OFFICE AUTOMATION SYSTEMS (HUTCHINSON & SAWYER, 2000:11.19).**

**GRAPHICS: D. WILSON**



According to Valente ed. (2001:8), technology used in the modern office, could include the following: internet, the web, intranet, e-mail, voicemail, e-commerce, m-commerce, wirelessness, video conferencing, convergence of technologies, cell phones, satellite, digital technology, modems, wireless application protocol (WAP), encryption (chips), electronic telephony, intelligent voice recognition (IBR), dragon - voice file, and automatic translating systems.

### **2.5.3 Higher Education (HE)**

One of the most significant changes that took place over the past five years, was the establishment of a new quality assurance system for South African Higher Education as outlined in the Education White Paper 3 (NPHE 2001:8). The key issue for the South African higher education system, as set out in the White Paper, is "... to redress past inequalities and to transform the higher education system to serve a new social order, to meet pressing national needs, and to respond to new realities and opportunities." Subsequently, the changes in higher education will address the following matters.

### **2.5.3.1 The South African Qualifications Authority (SAQA)**

The South African Qualifications Authority body was established by an act of Parliament in 1995 in order to develop a National Qualifications Framework (NQF) (SAQA 2002:8-9). The members of SAQA were nominated by stakeholders in education and training and appointed by the Ministers of Education and Labour in May 1996. The fact that both ministers from education and labour were involved, emphasised the new shift in negotiations between the workplace and education and training. SAQA sets and monitors standards in education and training and also sets regulations for the accreditation of providers of education and training. SAQA has two main functions, namely Standards Setting and Quality Assurance.

### **2.5.3.2 National Qualifications Framework (NQF)**

The origin of the NQF started in the mid 1970's when Black trade unions were refused living wages on the grounds that workers were unskilled. Then came a demand for change in education and by the 1980's the entire education system was discredited and rejected. People without any formal education, but who had gained experience, skills and knowledge in the workplace, received no recognition. In an ever-changing world with rapid technological advances, South Africa needed an education and training system that provided quality learning (NQF 2002:2).

Ball (1996) describes the profile for 21<sup>st</sup> century learners as "flexible generalists". He emphasises the goal of life-long learning, which will contribute to the successful life of people in this country. There is a shift in thinking from training to performing a specific job, to adjusting skills for new working environments (NQF 2002:2).

The NQF is a set of principles and guidelines by which records of learner achievement are registered for national recognition of acquired skills and knowledge, and encourages life-long learning. The implication of this was, that all institutions of higher learning in South Africa had to register their qualifications and programmes with SAQA in line with the proposed NQF, which then included all offerings including information administration, at Technikons. This created the opportunity to review the programmes, as well as teaching practices and assessment criteria, which had to be based on learning outcomes (Du Plooy 2002:4).

The following are the objectives of the NQF as in the SAQA Act of 1995 (NQF 2002:3).

- An integrated national framework for learning achievements
- Better accessibility to education, training and career paths
- Improvement of quality of education and training
- Making adjustments to past unfair discrimination in education, training and employment opportunities
- Contributing to the full personal development of learners, as well as the social and economic development and upliftment of the nation.

Qualifications and standards are registered at specific levels of the framework and have a credit value. The aims of the introduced standards are to -

- promote life-long learning,
- integrate education and training, and
- give recognition for all learning that took place.

**TABLE 3: A QUALIFICATIONS FRAMEWORK FOR HIGHER EDUCATION  
(ANNEXURE G) (DISCUSSION DOCUMENT)**

NQF Levels	HE Sub-levels	(Cumulative minimum totals) & minimum credits per qualification	General Vertical articulation		Articulation Horizontal & diagonal articulation	Career-focused Vertical articulation	
8	PG 4	(1020) 360	Doctor of Philosophy (360 @ PG4)			Doctor of Philosophy, Professional Doctorate (360 @ PG4)	
8	PG 3	(660) 180	Research Master's Degree (120 @ PG3)	Structured Master's Degree (60 @ PG3)		Research Master's Degree (120 @ PG3)	Structured Master's Degree (60 @ PG3)
8	PG 2	(600) 180/120		Master's Diploma (120 @ PG2)	Master's Certificate (72 @ PG2) (articulation credits)	Master's Diploma (120 @ PG2)	Professional Master's Degree (180 @ PG2)
8	PG1	(480) 480/120	Bachelor Honours Degree (120 @ PG1)	General Postgraduate Diploma (10 @ PG1)	Postgraduate Certificate (72 @ PG1) (articulation credits)	Advanced Career-focused Bachelor's Degree, [e.g. Btech] (120 @ PG1)	Career focused Post-graduate Diploma (120 @ PG1)



NQF Levels	HE Sub-levels	(Cumulative minimum totals) & minimum credits per qualification	General Vertical articulation	Articulation Horizontal & diagonal articulation	Career-focused Vertical articulation
7		(360) 360/120	General Bachelor's Degree (120 @ 7)	Graduate Certificate (72 @ 7) (articulation credits)	Career-focused Bachelor's Degree (120 @ 7)
6		(240) 240	General Diploma (90 @ 6)	(articulation credits)	Career-focused Diploma (90 @ 6)
5		(120) 120		Foundation Certificate (72 @ 5)	Career-focused Certificate (72 @ 5)
4		(120) 120	FETC (72 @ 4)	Bridging Certificate (72 @ 4)	FETC (72 @ 4)

Source: Council on Higher Education (CHE). New academic policy for programmes and qualifications in Higher Education. Discussion document. Dec. 2001.

- **Levels on the NQF**

SAQA has assigned 4 levels to Higher Education, levels 5 to 8 with level 8 being open-ended. Levels 5 to 7 accommodate undergraduate study and the open-ended level 8, postgraduate study. The highest level of the Further Education and Training Band, is level 4. Annexure G outlines the levels in more detail.

- **HE sub-levels**

The open-ended level 8 indicates how the traditional qualifications structure has been accommodated through postgraduate sub-levels.

- **General track column**

This track shows the qualifications which traditionally have been offered by universities and are based on academic, discipline-based and cognitive theories of learning.

- **Articulation column**

The horizontal and diagonal articulation between qualifications, is a unique feature of the framework. This feature enables learners without the required entry requirements to 'catch up' instead of 'going back' to the beginning, and where RPL can be implemented.



- **Career-focused column**

This column shows the qualifications traditionally offered by technikons and universities. The qualifications are based on vocational, career-based or professional understandings of learning towards broadening the focus.

#### **2.5.3.3 Higher Education Quality Committee (HEQC)**

The White Paper on Higher Education, the Higher Education Act of 1997, made provision for the Council on Higher Education (CHE) to establish the Higher Education Quality Committee (HEQC). The HEQC has the following objectives (HEQC 2001:1, 4-5).

- To promote quality assurance in higher education
- To audit the quality assurance mechanisms of higher education institutions
- To accredit programmes of higher education

The HEQC participates in the Education and Training Quality Assurers (ETQA) Forum and is subject to all of SAQA's requirements for ETQA's in higher education. The HEQC plans to form a single accreditation system that integrates universities, agricultural colleges and private providers.

#### **2.5.3.4 Modularisation**

The National Plan for higher education outlines a framework for the implementation for the transformation of the higher education system. The increasing importance of high-level skills and human resources for the social and economic development of the country, indicates the needs for well-planned teaching and learning programmes (Cooke 2001:6). The learning programmes need to be redesigned in order to accommodate outcomes-based education and training and the model of modularisation needs to support NQF objectives and requirements.

#### **2.5.3.5 Outcomes-based Education (OBE)**

Change for the entire education and training system were introduced with Curriculum 2005 and a new National Qualifications Framework (NQF) (Le Grange & Reddy 1998:1, 6-7). This new curriculum is based on outcomes, in contrast to the previ-

ously content-based curriculum. With the outcomes-based system approach, each learner brings her/his prior knowledge and experiences to the learning situation. The learners add the new knowledge to their own knowledge and develop their original concept as learning takes place. The end products are the learning outcomes formed by knowledge and a range of skills and attitudes.

#### **2.5.3.6 Foundational Learning Skills**

The economy of a country depends on the education of the nation (Du Plessis *et al.*, 1996:75-78). For a growing economy in South Africa, businesses need people with knowledge and skills for them to be able to compete in national and international markets. The South African nation is facing a learning problem and, therefore, it is necessary to view education, training and development in South Africa. A high percentage of an average South African's reading ability is lower than grade 7 and millions are completely illiterate. The approach of foundational learning skills, is to exercise the foundational skills of learning through correct and regular practice. All the skills applied while learning, occurs simultaneously.

The following skills are of paramount importance.

- **Concentration**

Keeping one's attention focused for any length of time.

- **Perception**

Becoming aware of something through one of the senses; hearing, seeing or touching, and to interpret this.

- **Logical thinking**

The ability to understand and to draw conclusions.

- **Memory**

The ability to recall or to remember, makes learning possible (Du Plessis *et al.*, 1996:75-78).

Without these basic foundational skills, people cannot reach their full potential or improve to a next work level, because of a lack of these skills (Du Plessis *et al.*, 1996:75-78).

## **2.6 SUMMARY**

The chapter presents an idea of what knowledge, skills and values/attitudes are. A background is given on the profile of a secretary, which includes a profile of an executive, as well as of a new millennium secretary. Responses on a survey conducted on the secretarial profession, are given, indicating challenges for secretaries, areas that need attention, and areas where performance was measured. The results on a survey determining the need for typing and shorthand speeds and current office practices, are outlined. The training of secretaries, the origin of the subject information administration at the Vaal Triangle Technikon, and the title secretary, are discussed.

The changes that affected the secretarial profession, such as office environment, technology, and higher education, were discussed.

Chapter 3 will outline the research methodology used for this study.



## **RESEARCH METHODOLOGY**

### **3.1 INTRODUCTION**

In the previous chapter the background of secretarial training and its nature with reference to the profile, training and title was discussed, as well as the changes brought about by the office environment, technology and higher education. This chapter will focus on the next cycle of AR, which is the acting cycle. In this chapter, the methodology of AL and AR and methods used to obtain information regarding the development and understanding of the skills and competencies required in office management education, will be discussed, as AL and AR forms the primary basis of this study's methodology.

### **3.2 AIM OF USING ACTION RESEARCH**

#### **3.2.1 Theoretical framework of ALAR**

Zuber-Skerritt (2001:5) describes a personal theoretical framework as a way in which people see the world through their life experience. It is, therefore, important for people personally and professionally to identify, understand and develop their individual framework through reflection on practice, personal and organisational learning, and critical discussion. The following four areas of theory will be discussed.

- **Grounded theory**

Grounded theory means the discovery of meaningful theories established from people, groups, or organisations and it should provide knowledge and understanding of a particular, individual case. Emancipatory AR aims at empowerment and self-confidence from everyone involved to create grounded theory from experience and practice (Zuber-Skerritt 2001:60).

- **Personal concepts theory (PCT)**

Action researchers are personal scientists, and are all capable of creating knowledge at various levels. Their development and conceptual change depend on their openness to change and their willingness to search for disconfirming as well as confirming evidence in their research (Zuber-Skerritt 2001:6-7).

- **Critical theory**

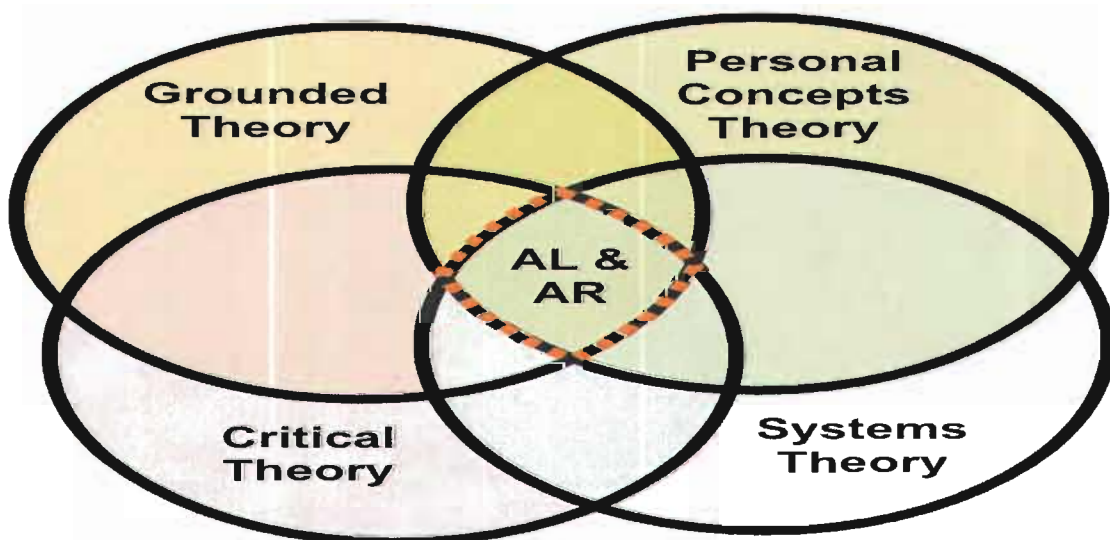
In AR, the problem-solving inquiry is conducted critically and collaboratively. The project team functions in an equal capacity to solving the research problem. It is expected, that all members in the group adopt a critical and self-critical attitude. This means critique must be accepted as a necessary condition for organisational change, innovation or recreation (Zuber-Skerritt 2001:7-8).

- **Systems theory**

The two main systems of importance as mentioned by Zuber-Skerritt (2001:9), are "... interrelatedness and systemic thinking. In this age of global interdependence, systems thinkers understand that everything is interrelated with everything else". It means to have the ability to see connections between events and issues in order to be able to solve a problem.

The shared areas in ALAR illustrate how these aspects overlap, as shown in figure 8.

**FIGURE 8: THEORETICAL FRAMEWORK FOR ALAR (ZUBER-SKERRITT:2001:16).  
GRAPHICS: D. WILSON**



When using ALAR, people develop system-oriented, holistic resolutions to complex problems in an organisation. In this process, everyone involved, develops and grows as persons, managers and leaders (Zuber-Skerritt 2001:10).

### **3.2.2 Praxis of ALAR**

Zuber-Skerritt (2001:10) defines praxis as the integration of theory and practice, research and development, thought and action. She also states, "... that there is no learning or research without action to follow, and no action without a knowledge foundation based on prior learning or research".

The aim of this research project, is to develop a profile for office managers, in collaboration with trade and industry, which will be developed through training potential office managers necessary skills and competencies, as well as curriculum development. One of the key factors was the selection of a suitable teaching and learning strategy to promote learning and in the process, also to meet the principles of outcomes-based education (OBE). In order to achieve this, the following question was asked in chapters 1 and 2: "What has changed about the values/attitudes, knowledge and skills in the office environment and how can learners be assisted to become competent office managers?" Since the problem which had to be addressed was, to study a real teaching situation and ask questions on how to improve the quality and outcomes from the current practice towards a better practice, a research approach that would meet the demands, had to be considered.

A conclusion could be drawn, that action learning and action research that could help learners to succeed could be applied. AR can assist as a way of reflecting on tertiary teaching and thereby creating an "inquiry culture" of teaching in higher education. Like any other professional role, teaching requires time and experiential insight. Therefore, AR is an appropriate strategy for professional development, as it is a method of inquiry that includes theory and practice and also generates research outcomes (Atweh et al., 1998:243-244; Mashile 2001:132). ALAR has been proven to play important roles in research and development as an appropriate methodology and process to create change, innovation, leadership and personal, professional and organisational learning (Zuber-Skerritt 2001:1). The concept of AR originated in the 1940's, and was developed by Lewin. It began in the field of social psychology and then extended to industrial training, to study ways to make businesses more efficient. It was adopted and applied to the educational sector in the 1950's. As a result of its

popularity, it was used by social scientists, as well as by practitioners (McLean 1995:4).

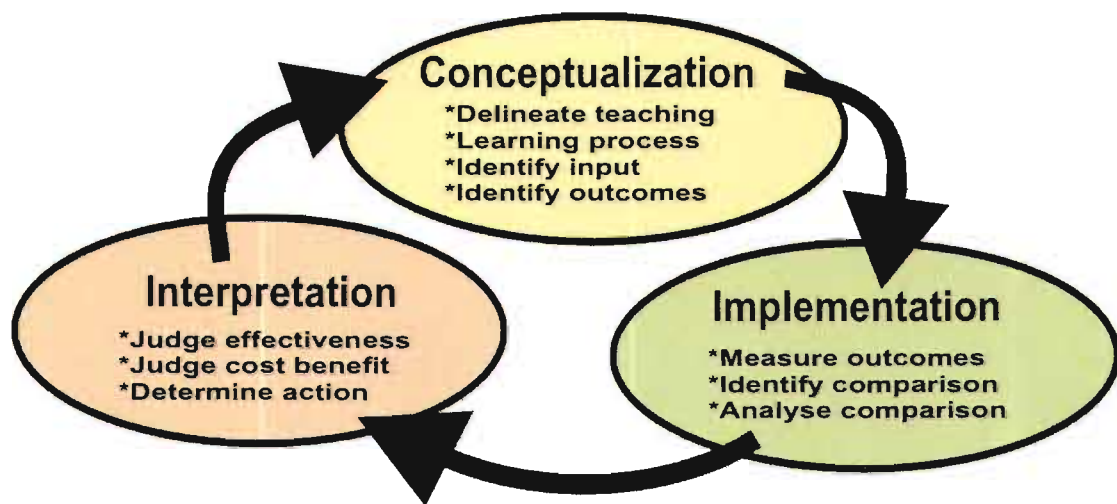
The following are definitions relating to AR: "Action research aims to contribute both to the practical concerns of people in an immediate problematic situation and to the goals of social science by joint collaboration within a mutually acceptable ethical framework" (Rapoport 1970:499). It is a process in which the consequences of educational decisions are systematically evaluated to change practice in order to have maximum effectiveness (McLean 1995:3; Schmuck 1997:20, 28). This means, that teachers should look at their teaching and leadership strategies, identify the outcomes, and observe if the outcomes indeed occur. AR is described as a sequence of steps and involves a spiral of self-reflective cycles, which includes planning a change, acting on the change, observing the process and consequences, reflecting on these processes and consequences and then to start re-planning (Atweh *et al.*, 1998:21; Zuber-Skerritt 2001:13; Carr & Kemmis 1986:162). The processes one is involved in, require critical reflection, as well as the communication thereof, with everyone involved, in order to change the processes one is involved in, therefore AR is AL (Harmse 1998:13). Schmuck (1997:20) also states the importance of inquiring into what is done, the reflection on the inquiry and to improve the practice. Carr & Kemmis (1986:1650) support the fact of involvement in all the phases to eventually bring change, that is, improvement.

Schmuck (1997:29) highlights the following characteristics of AR.

- **Practical.** Insights and knowledge from data lead to practical improvements in the classroom during and immediately after the inquiry.
- **Participative.** Action researchers are co-workers, (teachers and learners together) and data are collected with and for people who are focused on a real problem.
- **Empowering.** All participants, teachers and learners, can affect and contribute equally to the inquiry.
- **Interpretive.** Learners and teachers share their perceptions and attitudes with one another.
- **Tentative.** Action researchers do not have the right or wrong answers. They introduce solutions based on the different views of the group.
- **Critical.** Teachers and learners have to use self-critical reflection: teachers on their teaching methods and learners on their learning methods.

To become involved in AR, as well as to be an effective action researcher, it is essential to possess a desire to improve the practice of education (McLean 1995:6-7). McLean is very clear in his guidelines to teachers, on improving education through AR, when he explains the following three phases in figure 9, which indicates no specific beginning or a specific ending.

**FIGURE 9: ACTION RESEARCH MODEL (MCLEAN 1995:67). GRAPHICS: D. WILSON**



- **Conceptualization.** Describing the present teaching-learning situation and identify the inputs and outputs, that are the expected results.
- **Implementation.** Measuring the outcomes, to identify a standard of comparison and comparing current performances with the standard.
- **Interpretation.** Comprises the findings of the AR questions.

By implementing the above three phases in AR, the effectiveness of materials and processes that are used to achieve student learning, are evaluated (McLean 1995:6). The importance of implementing the three phases is, that there is no specific beginning and no specific end. When one cycle of action is completed, another begins. The model illustrates the effectiveness of AR in the continuous approach to improve the achievement and outcomes of education.

The concern that there should be an improvement in teaching methods arose when outcomes were not satisfactory and learners merely did what was expected of them, without any questioning from their side. From observation during teaching and based on outcomes, the teaching did not meet the expectations, as the assignments did not always connect with practice. The question of what commerce and industry needed in the information age of the twenty-first century, should be investigated. The ques-



tions asked, were: "Why does one teach, what value does it have, what was one's vision, how can one's teaching make a difference, how can one learn more in finding a better way?" Because of the necessity to encourage inquiry into the practice of teaching and with confidence in knowledge of the curriculum, of pedagogy, and assessment, as well as experience, the study made use of AR. A transformation from the role of teacher into the role of facilitator constituted a radical change. To become learner-focused, meant to engage in problem-posing, rather than problem-solving, as well as to change from performing as a lecturer to rather meet the needs of learners and monitor the process of learning.

The figure 10 which is a premise of AR, explains and illustrates continuous improvement:

FIGURE 10: CONTINUOUS IMPROVEMENT (SCHMUCK 1997:39). GRAPHICS: D. WILSON



- **Problem-solving** involves specifying the problem, evaluating the situation, searching for solutions, planning for action, anticipating obstacles, taking action, and evaluating the action.
- **Reflective practice** is to think about the future, the past, and the present and to ask questions in this respect. Reflective practice contributes towards problem-solving.
- **Action research** is to gather data to contribute towards problem-solving.
- **Continuous improvement** is the goal to be reached with AR.

Although problem-solving, reflective practice and action research can be distinguished from one another, they are interrelated and overlapping in practice. The

three are also synonymous with continuous improvement (Schmuck 1997:3, 34, 39; Zuber-Skerritt 2001:1; Atweh *et al.*, 1998:25).

As illustrated in Figure 3, the AR process is a spiral of AR cycles (Zuber-Skerritt 2001:13; Carr & Kemmis 1986:165), which involves the following.

- **Planning** a change
- **Acting** on the plan
- **Observing** the process and consequences of change
- **Reflecting** critically on the processes and consequences
- **Re-planning**, to start the continuous cycle on new ideas.

The two most essential aims of AR are to improve and to involve. There are three areas for improvement, namely improvement of practice, improvement of understanding of the practice by its practitioners, and the improvement of the situation in which practice takes place (Carr & Kemmis 1986:165).

It is important to note, that AR concerns actual, not abstract, practices (Atweh *et al.*, 1998:24-25). It involves learning about the real, material, concrete, particular practices of particular people in particular places. AR differs from other forms of research in its adhering persistently to changing particular practitioners' particular practices, rather than by focusing on practices in general or on the abstract.

For this study, a variety of methods of gathering data were used. The use of multiple data-collection methods, also called triangulation, contributes to the trustworthiness of the data (Glesne 1999:31). The following approaches were used.

#### **3.2.2.1 Triangulation** (Zuber-Skerritt 1998:9-10; Ertmer 1997:169).

- Data triangulation: data from different settings, individuals or groups
- Investigator triangulation: data from different investigators or analysts
- Methodological triangulation: data from different methods or techniques
- Theoretical triangulation: use of different theoretical perspectives in interpreting data.

### 3.2.2.2 General approach of AR

The following activities characterise the general approach of AR, according to (Zuber-Skerritt 1998:10).

- Identify and analyse a problem
- Design strategies for solving the problem
- Implement and test the strategies
- Evaluate the effectiveness
- Reflect on the results
- Arrive at conclusions and/or newly identified problems
- Repeat this cycle again several times, until satisfied with the improved practice
- Report findings as a research report.

Schmuck (1997:29) distinguishes the following objectives.

- To improve practice continuously in a systematic way
- To reflect on practices and try out alternative practices to improve outcomes.

Zuber-Skerritt (1998:10) identifies the following applications of AR.

- Improving education
- Developing student learning skills
- Developing supervisory competencies
- Quality and productivity improvement programs.

The types of outcomes from AR.

- **Changes in the use of language and communication:** the actual way that people identify and describe their world and work
- **Change in activities and practices:** what people are actually doing in their work and learning
- **Changes in social relationships and organisation:** the ways people interrelate and the ways their relationships are structured and organised within the organisation.

Development outcomes of AR.

- From single-loop learning to double-loop learning
- From dependence on experts to independence in thought and expression
- From an efficient and task-oriented practitioner to an effectiveness-oriented, reflective officer.

The benefits of AR are to:

- improve the educational environment for students;
- give personal satisfaction from more control over a person's professional life;
- solve a practical problem systematically and collaboratively by using enquiry skills;
- identify the best practice; and
- empower people to determine what will be best for the situation (McLean 1995:67-68).

According to Atweh *et al.*, (1998:22-23), participatory action research (PAR) helps people to investigate and change their social and educational realities by changing some of the practices which form their lived realities. AR can be undertaken as a **solitary or collaborative/participatory** process and can be used for professional development, improving curricula or problem-solving in a variety of work situations. Among others, the following are six other key features of PAR.

- **PAR is a social process** - it explores the relationship between the two fields, the individual and the social.
- **It is participatory** - people examine their understandings, skills and values and their interpretations and reflect on how these influence their actions.
- **It is practical and collaborative** - people aim to work together in reconstructing their social interactions.
- **It is emancipatory** - it aims to help people to recover from social structures, which limit their self-development and self-determination.
- **It is critical** - it is a process in which people set out to compete and reconstitute ways of interpreting and describing their world, and ways of relating to others.
- **It is reflexive** - to investigate their practices through a spiral of cycles and to learn more about it and by changing it (Atweh *et al.*, 1998:23-24).

### 3.3 ACTION LEARNING

To move away from the traditional learning method and because of the learning problems of learners, it was decided to implement AL as a learning strategy for training learners to become competent office managers. As illustrated in Chapter 1, Figure 1, AL moves away from traditional learning by asking fresh questions, learning through discussion, learning by doing, and learning through reflective practice (Zuber-Skerritt 2001:12).

A pioneer and one of the world's most prominent leaders, Reg Revans, introduced the world to action learning in the 1930s (Marquardt 1999). At Cambridge, as a physicist, he observed how the scientists working in the laboratory shared their problems, questioned one other, and received support from the group. This was instrumental in facilitating the origin and process of AL.

Change is all around us, due to technology and globalisation, which have transformed both our lives and the world in which we work, therefore learning and acting must take place at the same time, since too little time causes one to focus on only one or the other (Marquardt 1999:3).

AL enables people to effectively and efficiently learn and at the same time to handle difficult real-life situations. It can be applied to the following five most important needs that face organisations today: problem-solving, organisational learning, team building, leadership development and professional growth and career development. Its specific use is to ask new questions i.r.o. existing knowledge, as well as to reflect on actions taken during and after the problem solving sessions (Marquardt 1999:4-5). The definition of AL, according to Rothwell (1995:5), is a real-time learning experience that is carried out with two equally important purposes in mind: meeting an organisational need and developing individuals or groups.

By using AL, equal value can be gained by solving problems and developing individuals and groups for the future (Rothwell 1999:10; Marquardt 1999:5). The simple learning model (Figure 11), shows how individuals can learn to take responsibility for their own learning while at the same time coping with real work-related problems or issues.

FIGURE 11: SIMPLE AL MODEL (ROTHWELL 1999:17). GRAPHICS: D. WILSON



Referring to figure 11, the following explanation is given relating to individual learning (Rothwell 1999:17).

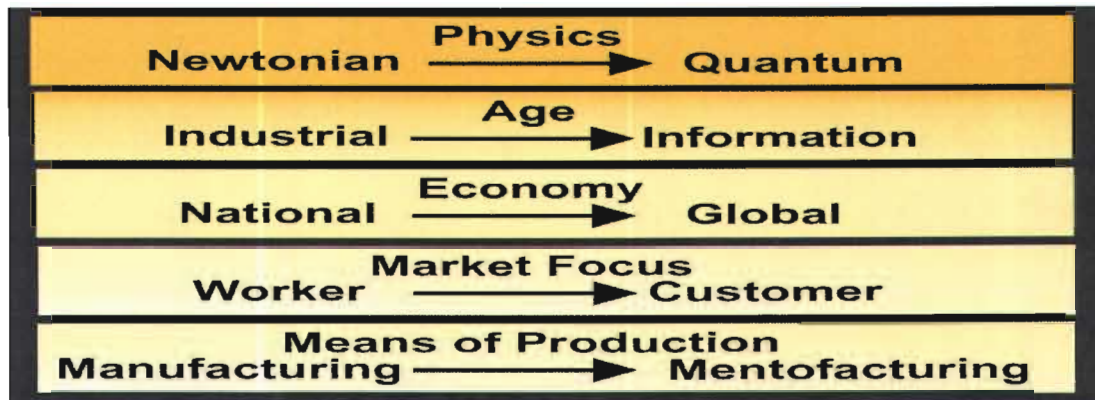
- People are motivated to learn when they become aware of a work-related or life-related problem.
- People search for resources such as people, materials and personal attributes to help them solve the problem.
- People apply their resources to solve the problem.
- People reflect on the experience and set goals for the future.

The following are five other groups who play a key role in deciding to apply AL.

- **Change champions:** those who recommend change, e.g. trainers, team facilitators, and team members.
- **Change sponsors:** those who support change, e.g. supervisors.
- **Change participants:** those who take part; the members of the AL team who plays an active role.
- **Change facilitators:** individuals who help a team to work with others and function creatively. They focus on how well group members interact.
- **Change stakeholders:** those who will benefit from improvement and are clients of the A/L team. They must be satisfied with the outcomes of an AL effort (Rothwell 1999:29-30).

Figure 12 illustrates why AL is necessary in a changing world and, therefore, sociologists and management specialists have identified five dramatic paradigmatic shifts causing the chaos in today's world and workplace (Marquardt 1999:11).

FIGURE 12: PARADIGM SHIFTS (MARQUARDT 1999:11). GRAPHICS: D. WILSON



The following five paradigm shifts will be explained: physics, age, economy, market focus, and means of production (Marquardt 1999:11-17).

- **Physics**

Newtonian physics has to do with cause and effect, predictability and certainty, distinct wholes and parts. Planning is done according to what can be seen, whereas quantum physics deals with the relationships, not just objects and things. Predictions cannot be made with certainty, because it is a world of chaos and process.

- **Age**

Industrial age accompanies machine technology and today we are moving towards the information age in the new era of increasing technological advancement, of which the most powerful is the internet.

- **Economy**

The four main forces responsible for this global age, are: technology, travel, trade, and television. Globalization joined economic and social forces, interests and commitments, values and tastes, challenges and opportunities.

- **Market focus**

The focus changed from worker-focus to customer-focus, determining how they will set strategies to carry out operations. Global competition offers customers more varied choices of higher quality.

- **Means of production**

The main driver of the economy is knowledge and it is becoming the source of organisational and personal power. Manufacturing work (manual work), has been replaced by knowledge work, (intellectual work). Mentofactoring is needed to create, understand, and manage the company's knowledge.

### 3.4 ACTION LEARNING AS A MODEL FOR TRAINING

The researcher decided to implement AL (§2.3.2) in both of the two modules, theory and practical, for the subject information administration (2001, 2002, 2003), following the AL cycle as indicated by Marquardt in figure 13:

FIGURE 13: ACTION LEARNING CYCLE (MARQUARDT 1999:36).

GRAPHICS: D. WILSON



An explanation of what the AL cycle means concerning both the modules for information administration, is given below.

- **Experience**

All learning and knowledge through experience during lessons, as well as by way of other media.



- **Identify problem**

Through group discussions and observation, the problems were identified and shared with all the groups in order to clarify these.

- **Reflect**

To critically reflect on the problems.

- **Experimenting**

Experimenting with different methods suggested.

- **Analysing/generalising**

Analysing the experiments.

- **Planning solutions**

Planning solutions on how to solve the problems.

- **Testing and taking action**

Testing the implications of the analysis in new experiences and examine for further learning.

Due to AL being implemented in the learning method at the VTT, a strategic planning workshop to equip and develop staff was initiated by the researcher. For this departmental project planning, the figure 8 of strategic project planning (Figure 4) was used to create the vision for the department, to determine and analyse the strengths, weaknesses, opportunities and threats (SWOT), to identify the various stakeholders involved and the resources needed and available (Zuber-Skerritt, 2000:43). An action plan was composed to achieve goals within the department.

### **Phase 1: Creating a vision and analysing the context**

- **Set up a vision by asking the following questions.**

What impact do I want to have with this project?

What will be different when this project is completed?

What will the project produce as a result?

- **Perform a stakeholders' analysis by listing all those who will:**

have an impact on the project

have an interest in the project, and

be affected by the project.

- **Do a SWOT analysis by considering the factors that are of strategic importance to the project.**

Strengths are things that are done well and that will be an advantage to the project.

Weaknesses are shortcomings that will affect the project.

Opportunities include internal as well as external factors that could contribute to the success of the project.

Threats include any factors that may hinder the success of the project.

- **Set up a resource inventory by listing the resources available for the project.**

People like staff, peers, and people from other institutions, networks and professional organisations, trade and industry.

Material will include relevant papers, articles, books, and software.

Financial and physical resources will include budget, equipment, and research staff.

Personal attributes include your personal resources such as experience, skills, knowledge and values.

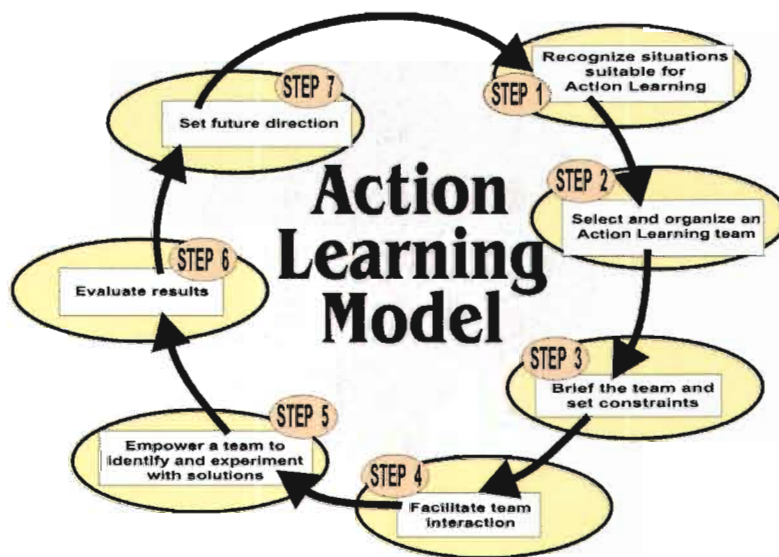
## **Phase 2: Action plan**

- Describe the scope of the project
- Set project goals
- Specify the areas in which results will be achieved if the project is successful
- Determine the measurements of outcomes

- List possible activities to achieve the project goals
- Determine which of the events are the most important for achieving the goals
- Create an event tracking in order to ensure that the action plan is comprehensive
- Do progressive evaluation.

The model below illustrates the key steps used for the AL programme for the department.

**FIGURE 14: ACTION LEARNING MODEL (ALM) (ROTHWELL 1999:12-16). GRAPHICS: D. WILSON**



- **Step 1: Recognise situations suitable for AL**

Situations were identified. The need existed for teamwork in the department, opportunities for improvement by learning new technology and programmes, to seek new training methods, and to create a vision for the department.

- **Step 2: Select and organise an AL team**

In this case, all staff members in the department formed a team as everyone worked towards the same goal, namely to improve practice.

- **Step 3: Brief the team and establish constraints**

The figure eight of strategic project planning was used.

- **Step 4: Facilitate team interaction**

A team facilitator lead and directed the team to work in unity.

- **Step 5: Empower a team to identify and experiment with solutions**

The team gathered information about the problem and applied creative problem-solving methods.

- **Step 6: Evaluate results**

Team members were responsible to assess new methods and reflected on their actions taken.

- **Step 7: Set future directions**

Team members discussed what went well and what did not go well so that future planning could be done.

According to Zuber-Skerritt (2001:7) the outcomes of AL programs are as follows.

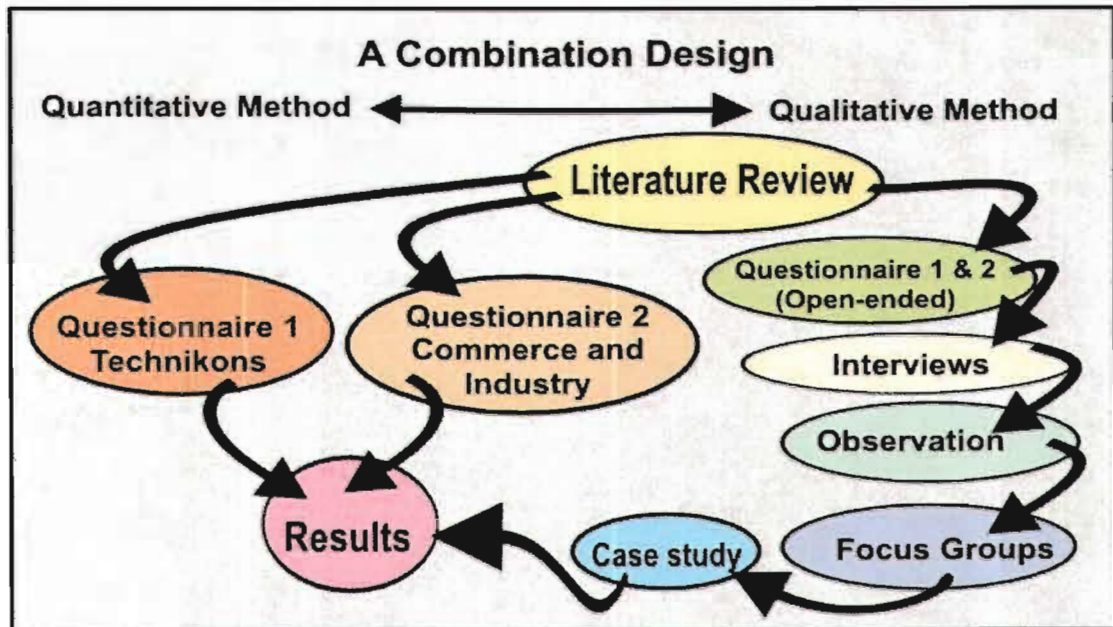
- Improving strategic thinking ability
- Understanding the change process
- Understanding the group process
- Providing a realistic outcome of benefits to the organisation
- Improving the understanding in organisations
- Developing new skills
- Giving ideas for future projects and programs
- Generating high returns on investments.

### **3.5 RESEARCH DESIGN**

According to Welman and Kruger (1999:46), a research design is a plan to use research participants and to collect information from them. Through this plan, a description is given of what the participants will do, so that a conclusion can be reached about the research question. For this study, both quantitative as well as qualitative

methods were used and will be discussed more specifically. To illustrate how the quantitative and qualitative methods were utilised in this study, see figure 15.

**FIGURE 15: A COMBINATION DESIGN OF BOTH QUANTITATIVE AND QUALITATIVE METHODS. GRAPHICS: D. WILSON**



### 3.5.1 Quantitative Research

Quantitative research is based on the collection of primary data from large numbers of individuals whose results will represent a sample of the population (Martins *et al.*, 1996:125). As AL and AR form the primary basis of this research project, the researcher also made use of the quantitative method by designing a questionnaire which was statistically analysed.

The requirements for a questionnaire and the listed questions will be described.

#### 3.5.1.1 Questionnaires

Malhotra, Tull and Hawkins (1993,1987:178), define a questionnaire as a definite set of questions to collect information from respondents. Schmuck (1997:52-53) also defines a questionnaire as lists in the form of questions or specific statements that persons respond to in writing. Surveys are useful to quantify information, but can also be used for qualitative information gathering (Zikmund 2003:175). The qualitative objective can also be to test or refine concepts where changes can be made, based on the respondent's suggestions. Surveys are mostly descriptive but can also

be designed to provide explanations or to explore ideas. Questionnaires can measure behaviour, knowledge, attitudes/opinions, and demographic information useful for classifying respondents (Malhotra, Tull & Hawkins 1993, 1987:178-179; Zikmund 2003:175).

A questionnaire needs to comply with certain requirements (Malhotra, Tull & Hawkins 1993,1987:179-180). These requirements include the following.

- It is essential to specify what information is needed in order to get the right answers from the respondents.
- To determine individual question content so that those questions do not overlap or present unwanted data or reveal only part of the data wanted.
- To word the questions correctly with simple, frequently used, and well-understood words, is very important.
- To choose what format will be used: open-ended questions where the respondent is free to reply in his/her own words or closed questions, where a list of possible categories to choose from, is given.
- The order in which the questions occur, can affect the replies. Start with simple and interesting questions and then set more specific questions.
- The physical characteristics should make the questionnaire easy to use and the importance of its appearance will secure the co-operation of the respondent.
- A pilot testing is recommended to make sure that the questions are understood and to provide knowledge about any problems.

### **3.5.2 Qualitative research method**

Qualitative research is a methodology used distinctly to help the researcher to define a problem with the help of the respondent (Malhotra 1993:178). Qualitative research studies feelings, opinions, needs, motives, attitudes, beliefs, past behavior, etc., when direct observation or structured approaches are difficult for obtaining data. Martins *et al.*, (1996:125, 133-134) describes qualitative research as a method where respondents can freely reveal new ideas or feelings for greater clarity in order to solve the problem without generalising about the population.

As mentioned previously (§3.2.2.1), qualitative researchers make use of a variety of methods, called triangulation, for the gathering of data (Glesne 1998:31; Zuber-

Skerritt 1998:9). Glesne (1998:31) mentions three data-gathering techniques that dominate in qualitative inquiry: observation, interviewing, and document collection.

Schmuck (1997:56) recommends action researchers to include questionnaires, interviews, observations, and documents in their data collection, therefore the following data collection methods will be described.

### 3.5.2.1 Questionnaires

The open-ended questions from the two questionnaires used for the quantitative method (§3.5.1.1), will be analysed according to the qualitative method. The questions are listed below.

**TABLE 4: QUESTIONS ASKED IN THE TWO QUESTIONNAIRES**

Questionnaire focusing on Technikons	Questionnaire focusing on commerce and industry
Question 7: What knowledge is required of a secretary? Other	Question 5: What is your definition of an office manager?
Question 8: What knowledge is required of an office manager? Other	Question 6: What is your definition of a secretary?
Question 9: What skills are required of a secretary? Other	Question 7: What is your definition of a personal assistant?
Question 10: What skills are required of an office manager? Other	Question 9: What would your requirements for a training programme be?
Question 11: What values/attitudes are required of a secretary? Other	Section D: Portfolio development
Question 12: What values/attitudes are required of an office manager? Other	Question 1: Do you find that the potential entry-level employees have difficulty conveying their capabilities/skills during an interview? Motivate

### 3.5.2.2 Interviews

Semi-structured interviews can be adapted for many different uses of collecting data and allow options for probes to clear up vague responses or to elaborate on answers (Welman & Kruger 1999:167). All the respondents are asked the same questions, but the interviewer can change the formulation or terminology of the questions to fit the respondent's background. Interviews are a form of direct communication between an interviewer and a respondent in which questions are asked in a face-to-face situation and which develops into a two-way conversation (Zikmund 2003:199; Schmuck 1997:53). Interviews can be held with individuals or groups and can vary in how formal or informal they are (Schmuck 1997:53-55). Interviews start with scope and open-ended questions and gradually move towards specific questions. When

answers will be compared and analysed it is best to pre-plan the questions to be asked. Advantages for using interviews, are the following.

- The data collector can guide and search the answers to get clarification and elaboration.
- The data collector can build a sympathetic relationship and closeness with the respondents.
- The data collector can collect data from respondents who dislike writing about their feelings and thoughts.
- The respondents remain anonymous in this method of data collection.
- Audiotapes can be used to gather data.

The analysis of the information obtained from the unstructured interviews, will be obtained from the notes taken by the researcher during the interviews.

### **3.5.2.3 Observations**

Zikmund (2003:238) defines observation as a process of observing and recording what people do. The investigator does not create, control, or manipulate the situation, but merely records what occurs. Schmuck (1997:54-55) supports this by stating that "observations involve attentively watching and systematically recording what is seen and heard". Most observations will be structured or semi-structured during a teaching situation. The following are some advantages of observations.

- Data can be gathered about behaviour and not only by way of perceptions and feelings.
- The investigator can see things that respondents will not be able to report.
- A video can be used for data gathering.

Participant observation in the real teaching situation for the subject Information Administration revealed learning problems in the theory and practical modules (§2.3.2). As defined by Welman and Kruger (1999:192-193), in participant observation the researcher takes part in and reports on the daily experiences of the group members. The flexibility of this process allows following up a lot of clues which the researcher has noticed. The analysis of the information obtained in the process of participant observation, is based on the researcher's records.



#### 2.5.2.4 Focus Groups

Morgan (1997:2) propounds, that the explicit use of focus groups, is to get information and insights through group interaction, that would otherwise be less accessible without interaction. The primary aim is interaction within the group, based on the topics supplied by the researcher who takes the role of the moderator. Bianco (1995:638) supports this fact by stating that "focus groups are essentially discussion groups". Moderators play an important role, as discussion leaders and can add value in terms of their experience, skills, and techniques (Bianco 1995:639). Welman and Kruger (1999:198) states, that focus groups are formed when more than one individual is interviewed at the same time and when they stimulate each other to share ideas and thoughts. Focus groups cannot substitute other qualitative research methods but can support other methods by its unique way of gathering data easily (Morgan 1997:2, 8). The strength in focus groups is the researcher's focus on the precise topic of interest to produce a concentrated amount of data (Morgan 1997:13). To clarify focus groups as a qualitative research method, the following uses are explained.

- Focus groups are used as a "self-contained" method - this means that they are used as the primary source of qualitative data collection, the basis of the study.
- Focus groups are used as a "supplementary" method - this means that they are used as a preliminary data source to assist the primary source.
- Focus groups are used as a "multimethod" - this means that they are used with other quantitative methods, such as interviews and observation. This method will be determined by the researcher's data needs (Morgan 1997:2-3).

Focus groups offer the following advantages. (Morgan 1997:8; Bianco 1995:640).

- The main advantage, is to observe discussions on a topic in a limited period of time
- The group effect results in more output as a result of a snowball effect
- The groups are more informal and spontaneous.

Another factor to consider when determining the success of focus groups, is the composition of the focus group in terms of the participants and the size of the group (Bianco 1995:639). There is no definite rule in terms of the number of participants. Successful groups contain from eight to ten members who represent individuals with

the topic concerned. Morgan (1997:43) also indicates, that there is no definite rule in determining the size of the group but suggests a range of six to ten, but also states that this should not be seen a boundary. Another suggestion is, that projects should consist of three to five groups.

Three focus groups were conducted for the study: Cape Technikon, Economic and Management Sciences conference (EMS), and Boleswa International Educational Research symposium.

### **3.5.2.5 The Case Study**

Welman and Kruger (1999:190) define the case study as follows: "The term case study pertains to the fact that a limited number of units of analysis (often only one), such as an individual, a group or an institution, are studied intensively. The term does not refer to some or other technique which is applied." Case studies are qualitative in nature and strive to provide an in-depth description of less than 50 cases in companies or organisations (Mouton 2001:149). Case studies deal with the understanding of a particular case (Welman and Kruger 1999: 190-192). When a group or institution is investigated, fieldwork is conducted, which means that the researcher conducts the investigation on the spot under natural circumstances. For the research procedure participant observation, unstructured interviews or descriptive statistics may be used. The following three aspects are important for conducting case studies.

- Its boundaries should be determined
- The main aspect is to search for repeated patterns and consistent regularities
- Triangulation is used to recognise these patterns and to confirm the findings.

### **3.5.2.6 Documents**

Documents include public records, press clippings, and private diaries (Schmuck 1997:56). In AR the analytical approach which is also called "content analysis" is used to analyse the documents for recurring themes and for multiple meanings. Other materials that assist in the analysis and understanding of themes and meanings, include curricula, textbooks, and instructional strategies. Documents used in this study, include notes in a diary from observations in the teaching situation, as well as notes from the learners; record-keeping of discussions of focus groups; any

documented information regarding the curricula; creating workbooks for practical assignments; and master documents related to the subject information administration.

### 3.6 SUMMARY

This chapter describes the research methodology of AL and AR as the primary basis of this study. The aim of using ALAR is discussed by looking at the theoretical framework, as well as the practical implementation.

It is, therefore, important to establish the background, that is the theoretical part, of the study by discovering and understanding the meaningful theories established with people, to create knowledge, to conduct critical problem-solving and to understand the meaning of interrelatedness and systemic thinking.

The implementation of ALAR as a learning strategy to develop a profile for office managers and also to meet the principles of outcomes-based education, is discussed. This methodology is appropriate for creating change, innovation, leadership and personal, professional and organisational learning. This method also contributes to this study where the improvement of quality and outcomes of a real teaching situation had to be considered. The values of AR, namely the practical, participative, empowering, interpretive, tentative and critical, were discussed. The three phases of AR, conceptualization, implementation and interpretation, shows how to improve the practice of education by implementing these three phases, while the problem of continuous improvement was addressed. A discussion on triangulation, the general approach of AR, the objectives of AR, the applications of AR, the types of outcomes from AR, the development outcomes of AR, and the benefits of AR, were given.

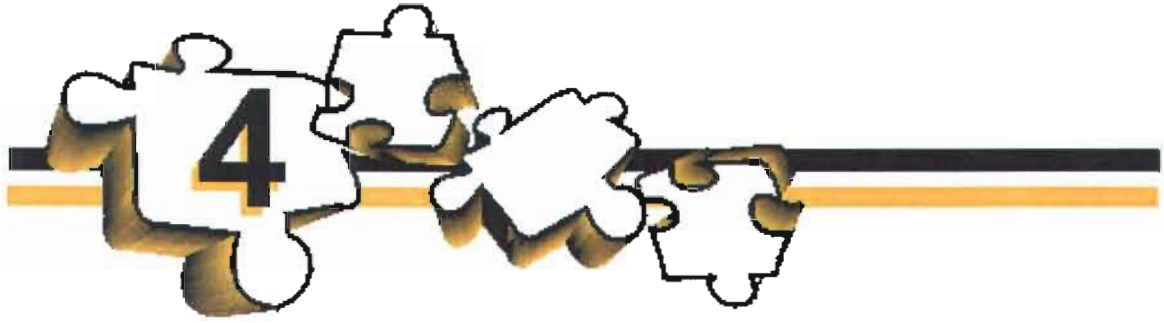
The importance of implementing AL, that is learning through discussion and questioning insight versus traditional learning, is explained and illustrated by the simple AL model that indicates how individuals learn to take responsibility for their own learning. Before AL can be applied, there are five groups who play an important role, namely change champions, change sponsors, change participants, change facilitators and all change stakeholders. The necessity for AL in a changing world is highlighted by the five paradigm shifts.

Learning problems in the subject information administration, modules 1 and 2, have been identified and will be addressed by using the AL cycle, as indicated in figure 13.

As a result of implementing AL in the teaching strategy, a departmental strategic project plan was created to achieve set goals for the department.

Lastly, discussions on the qualitative and quantitative research methods were given, with emphasis on the four methods used by the researcher, namely questionnaires, interviews, observations, a case study and documents.

AL and AR learning strategies have not yet been applied in the discipline information administration. The following chapter will tabulate the results of the AL and AR done, as well as the results of the qualitative and quantitative research conducted.



## **IMPLEMENTATION AND RESULTS**

### **4.1 INTRODUCTION**

A discussion of the sample used in the study and its characteristics (chapter 3), outlines the multivariable statistical design of both quantitative and qualitative methods (Figure 15) used. This chapter continues with the AR cycle, namely to observe what has been done. It will also deal with the analysis of the methods utilised, as well as a discussion thereof. The aim of the chapter, is to answer the following research questions posed in chapter 1.

- To investigate the knowledge, skills, and values/attitudes for competent office managers.
- To contribute to the development of an understanding of the skills and competencies that have to be developed within office management education, including curriculum development.
- To provide a profile for office managers and to develop a model for the training of office managers through the use of A/L.
- To determine whether there will be a paradigm shift from secretary to office manager in terms of status.

In order to ensure a logical order of discussion, the analysis of the quantitative data will first be discussed, namely the first questionnaire that was sent out to Technikons in South Africa. This will be followed by a discussion of the second questionnaire, that was sent out to commerce and industry. Secondly the analysis of the qualitative data will be discussed according to the following methods which were utilised: data from both questionnaires, interviews, observations, and focus groups.

## 4.2 QUANTITATIVE RESEARCH

In this research project the structured open-ended and closed questionnaire is used. Respondents are given the opportunity to give their views and explanations on the questions asked. Two questionnaires are designed to assist in this specific research. The first questionnaire (see Annexure B) focuses on Technikons in South Africa and the second questionnaire on commerce and industry (Annexure D). These will be discussed accordingly.

The first questionnaire focuses on Technikons in South Africa (Annexure B). With reference to (§1.2.2), questions 1 to 6 were formulated regarding the training of office managers at Technikons in South Africa and questions 7 to 12 focused on the knowledge, skills, values/attitudes of secretaries/office managers. Question 13 and 14 evaluated the need for formal training for secretaries/office managers, question 15 covered a vision for a curriculum and question 16 biographical information from respondents.

The second quantitative questionnaire focuses on commerce and industry and consists of sections A to F (Annexure D).

Section A determines a **position profile**.

- Question 1 determines a specific name for the job description: secretary, office manager, personal assistant, or any other name.
- Question 2 deals with the requirements for the position: senior certificate, diploma, degree, and experience.

Section B covers the **work environment**.

- Question 1 deals with change in the management of an office.
- Question 2 deals with change in the administration of an office.
- Question 3 determines the measuring tool to evaluate job performance.

Section C determines a **work profile**.

- Question 1 requires the knowledge of an office manager, secretary, or personal assistant.
- Question 2 requires the skills of an office manager, secretary, or personal assistant.

- Question 3 requires the values/attitudes of an office manager, secretary, or personal assistant.
- Question 4 determines the need for a formal qualification for an entry-level for an office manager, secretary, or personal assistant.
- Question 5 requires a definition of a secretary.
- Question 6 requires a definition of an office manager.
- Question 7 requires a definition of a personal assistant.
- Question 8 tests the awareness of training office managers at the Vaal Triangle Technikon.
- Question 9 determines the requirements for a training programme.

Section D covers **portfolio development**.

- Questions 1 to 5 determine the value of a portfolio to assist during interviews.

Section E gathers information regarding **practical training**.

- Question 1 requires information for evaluation on personal performance and job performance.

Section F requires **biographical data** that can be utilised for reference purposes.

#### **4.2.1 Questionnaire for lecturing staff of Office Management and Technology at Technikons in South Africa**

As indicated in (§1.2.1), this study investigates the knowledge, skills, and values/attitudes, for competent office managers, as well as the needs in commerce and industry for training these office managers. In other words, it was important for the researcher to include training institutions as well as organisations as the target population for this study. The random sample chosen for this study consisted of the Technikons in South Africa, as well as business organisations. With random sampling, each member of the population has the same chance of being randomly selected into the sample and each sample size has an equal chance of being chosen (Welman & Kruger 1999:52). On 15 - 16 November 2001 all fourteen Technikons were represented at an office management and technology workshop held at the Cape Technikon where questionnaires were handed out to the delegates. Eight of the Technikons responded and in total eighteen, respondents. The researcher contacted different organisations, visited them on appointment and handed out the ques-

tionnaires. Some questionnaires were also sent by e-mail. The total respondents from these questionnaires were seventy-eight.

Table 5 indicates the Technikons that responded to the questionnaire and reflects the representation of 8 out of a total of 14 Technikons.

**TABLE 5: TECHNIKONS REPRESENTED**

Technikons	Frequency
Not Indicated	2
Border Technikon	3
Cape Technikon	2
Eastern Cape Technikon	3
Mangosuthu Technikon	1
ML Sultan Technikon	1
Port Elizabeth Technikon	1
Technikon North West	3
Vaal Triangle Technikon	2
Total	18

The following constitutes a discussion of the questions posed in the questionnaire.

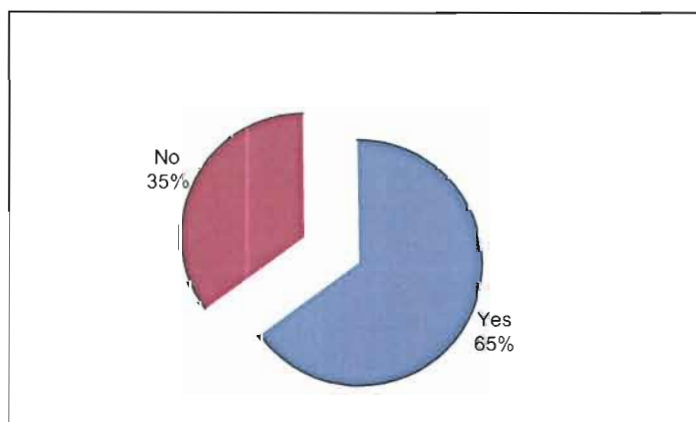
#### **4.2.1.1 Programme offered at institution (Question 1)**

In this question, respondents were asked to indicate if the programme in Office Management and Technology is offered at their institution. All of the respondents (n=18) indicated that the programme in Office Management and Technology is offered at their institutions.

#### **4.2.1.2 Training of secretaries (Question 2)**

Respondents had to indicate whether their institution trains secretaries.

**FIGURE 16: DISTRIBUTION OF SECRETARIES TRAINED AT INSTITUTIONS**





A majority of the respondents (65 per cent) answered this question and indicated that they do train secretaries. One respondent did not complete this question and was coded as "missing". The aim of this question was to identify which institutions train secretaries and not office managers.

#### 4.2.1.3 Number of secretaries trained (Question 3)

Respondents' feedback on this question was very low. Only 6 respondents out of a total of 18 responded and answered that they do train secretaries.

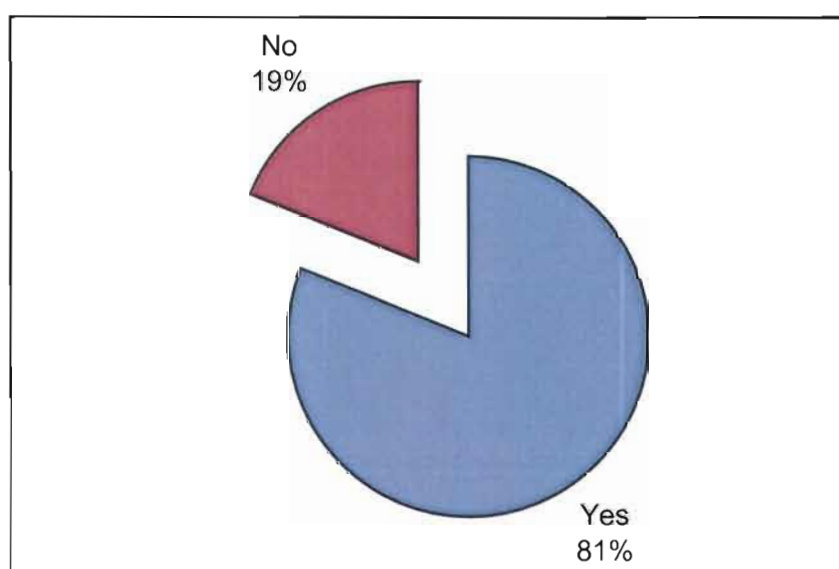
**TABLE 6: NUMBER OF SECRETARIES TRAINED AT TECHNIKONS**

No of secretaries trained	Technikons					Total
	No name	Border Technikon	Cape Technikon	Mangosuthu Technikon	Technikon North West	
10					1	1
12		1				1
15		1				1
75	1					1
90				1		1
400			1			1
Total	1	2	1	1	1	6

#### 4.2.1.4 Training of office managers (Question 4)

Respondents had to indicate whether their institution trains office managers.

**FIGURE 17: DISTRIBUTION OF OFFICE MANAGERS TRAINED AT INSTITUTIONS**



The majority of the respondents (81 per cent) indicated, that they do train office managers at their institutions. Questions 2 and 4 could reflect that some institutions train both secretaries as well as office managers.

#### 4.2.1.5 Number of office managers trained (Question 5)

As in question 3, respondents' feedback on this question was also very low. From a total of 18, only 9 respondents answered this question.

**TABLE 7: NUMBER OF OFFICE MANAGERS TRAINED AT TECHNIKONS**

No of office managers trained	Technikons								Total
	Border Technikon	Cape Technikon	Estern Cape Technikon	ML Sul-tan Technikon	Mango-suthu Technikon	Port Elizabeth Technikon	Vaal Triangle Technikon	East Rand satellite campus	
5	1								1
70		1							1
75	1								1
100								1	1
105			1						1
120				1		1			2
130							1		1
400					1				1
Total	2	1	1	1	1	1	1	1	9

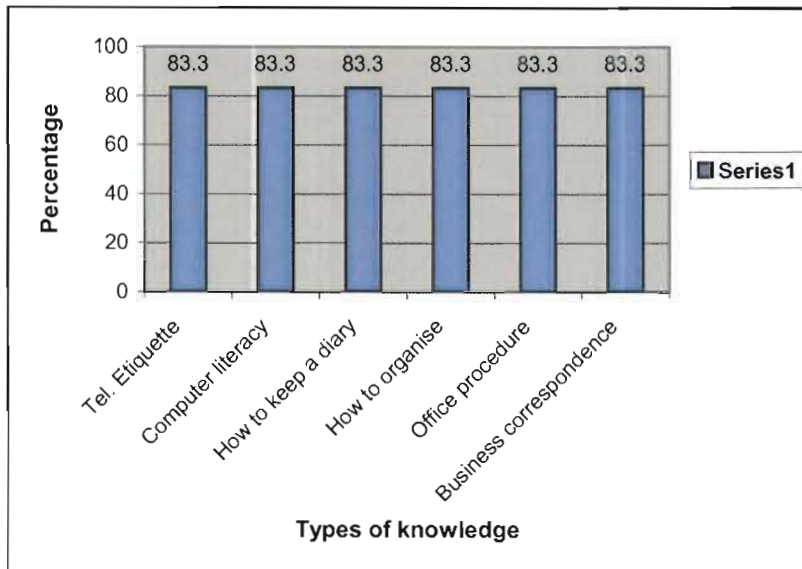
#### 4.2.1.6 Information administration (Question 6)

Respondents had to indicate if the subject "information administration" is offered at their institution. All of the (n=18) respondents indicated that information administration is offered at their institutions. This indicates, that all the Technikons that completed this questionnaire, are offering this subject.

#### 4.2.1.7 Knowledge : secretary (Question 7)

The aim of this question was to determine what knowledge is required of a secretary. Respondents had to choose from the listed statements given to them. The outcome of this question is summarised in figure 18.

**FIGURE 18: KNOWLEDGE REQUIRED OF A SECRETARY**

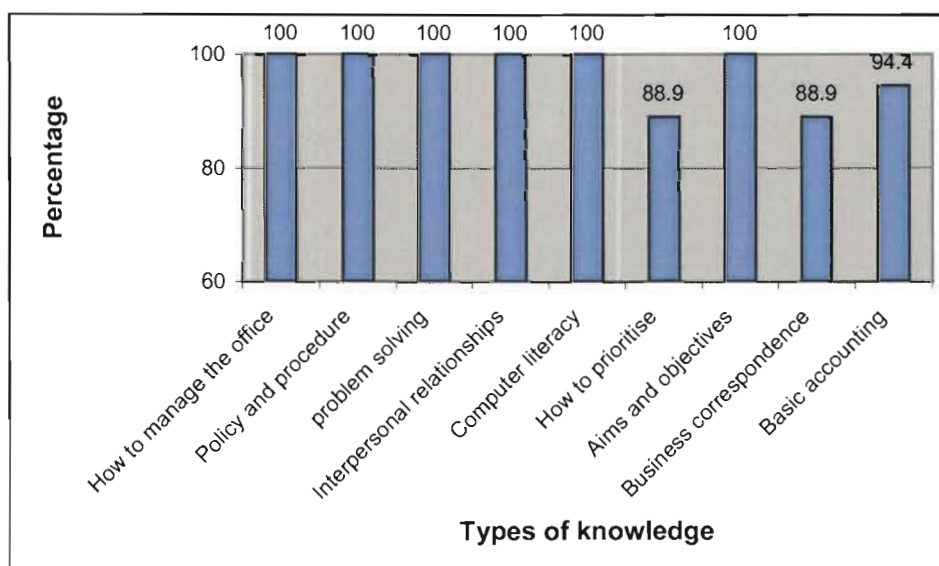


According to the bar chart, 83.3 per cent of the respondents think that telephone etiquette, computer literacy, how to keep a diary, how to organise, office procedures and business correspondence, constitute important knowledge required of a secretary.

#### **4.2.1.8 Knowledge : office manager (Question 8)**

This question requested respondents to indicate from the list what knowledge is required of an office manager.

**FIGURE 19: KNOWLEDGE REQUIRED OF AN OFFICE MANAGER**

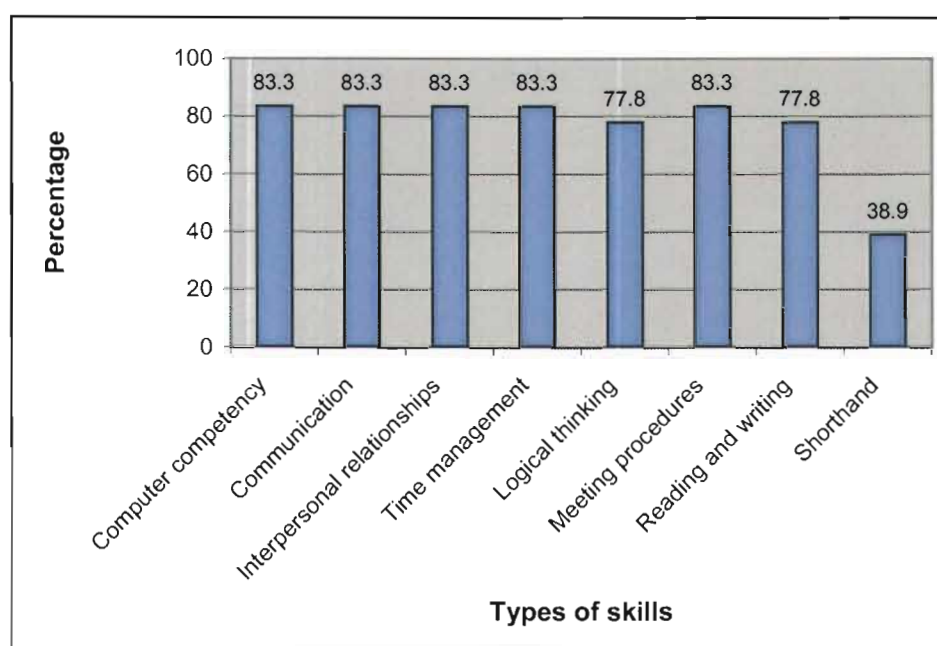


According to the bar chart, all (100 per cent) of the respondents indicated that knowledge of how to manage the office, policy and procedures, problem-solving, interpersonal relationships, computer literacy and aims and objectives of the company, were most important. A response of 94.4 per cent for knowledge of basic accounting and 88.9 per cent for how to prioritise and for knowledge of business correspondence, was received from respondents.

#### 4.2.1.9 Skills : secretary (Question 9)

In this question respondents had to indicate from the list which skills are required of a secretary. Figure 20 illustrates the various skills required of a secretary.

**FIGURE 20: SKILLS REQUIRED OF A SECRETARY**

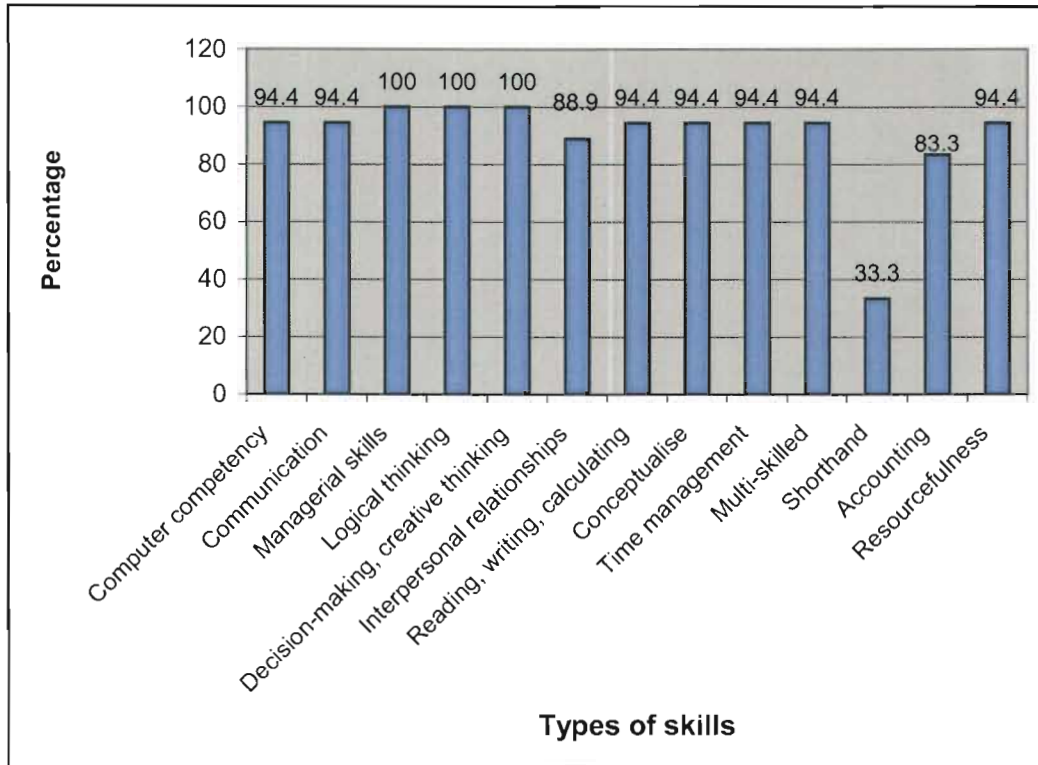


Most (83 per cent) of the respondents indicated that computer competency, communication, interpersonal relationships, time management, logical thinking, meeting procedures, and reading and writing are important skills. The only skill that a secretary does not need to have, is shorthand skills, which seems less important, according to the respondents (38.9 per cent).

#### 4.2.1.10 Skills : office manager (Question 10)

The aim of this question was to determine what skills are required for an office manager.

**FIGURE 21: SKILLS REQUIRED OF AN OFFICE MANAGER**

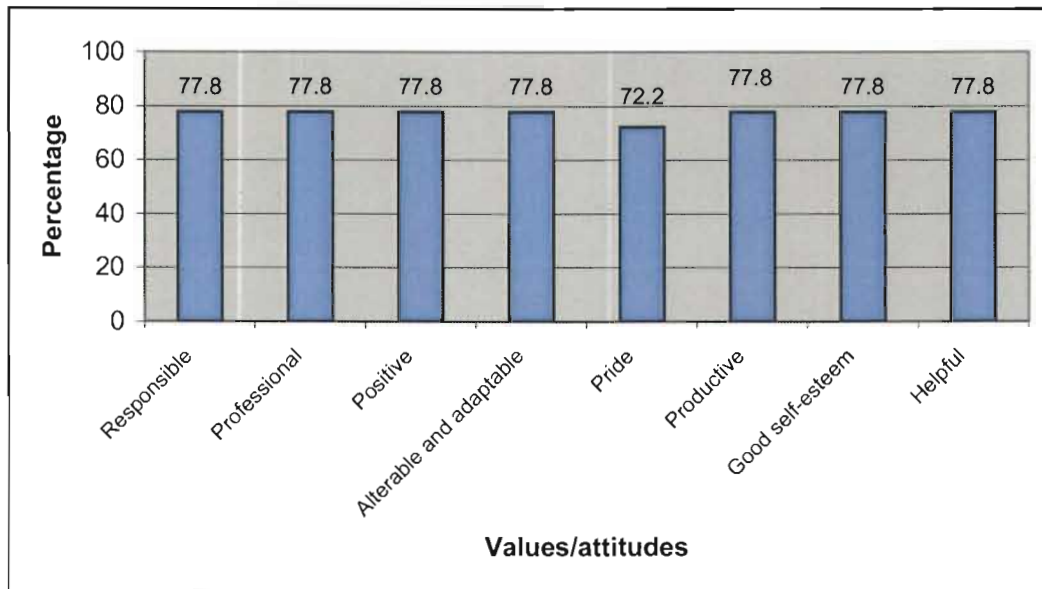


The outcome of the above-mentioned question can be summarised as follows. Most respondents (100 per cent) valued managerial skills, logical thinking, decision-making/creative thinking as most important. Some (94.4 per cent) respondents valued computer competency, communication, reading/writing/calculating, conceptualising, time management, multi-skilled and resourcefulness as the second highest. The other respondents, 88.9 per cent, named interpersonal relationships, 83.3 per cent accounting, while 33.3 per cent said, that an office manager does not need to have shorthand skills.

#### **4.2.1.11 Values/attitudes : secretary (Question 11)**

Respondents had to indicate which values/attitudes listed, are required of a secretary. Figure 22 indicates all of these values/attitudes.

**FIGURE 22: VALUES/ATTITUDES REQUIRED OF A SECRETARY**

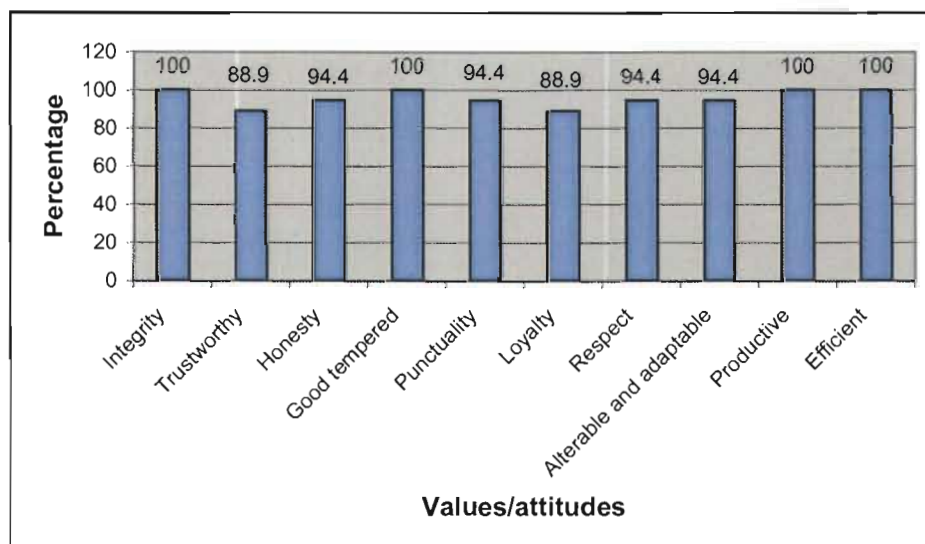


Most respondents (77.8 per cent) indicated, that the listed values/attitudes as given on the bar chart, are important.

#### **4.2.1.12 Values/attitudes : office manager (Question 12)**

In this question, the respondents had to indicate which values/attitudes listed are required of an office manager.

**FIGURE 23: VALUES/ATTITUDES REQUIRED OF AN OFFICE MANAGER**

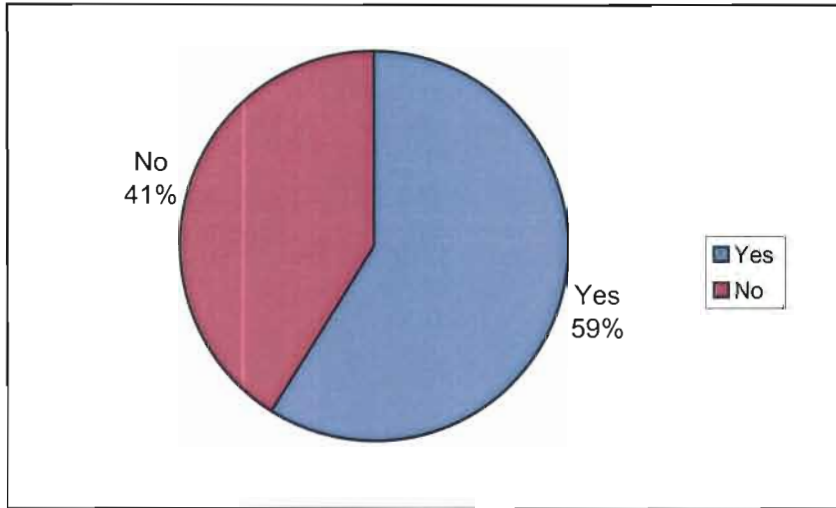


All the respondents indicated, that the listed values/attitudes required of an office manager, as given in the bar chart, are important.

#### 4.2.1.13 Need to train secretaries (Question 13)

The aim of this question was to determine whether respondents feel that there is a need to train secretaries.

**FIGURE 24: THE NEED TO TRAIN SECRETARIES**



From figure 24 it is clear, that 59 percent of the respondents indicate that there is a need to train secretaries. The motivations given to train secretaries, are given in table 8 below:

**TABLE 8: MOTIVATIONS FOR TRAINING OF SECRETARIES**

Motivation	Frequency	%
No response	7	38.9
At technical colleges	3	16.7
Positive contribution add to productivity	1	5.6
For the corporate world	1	5.6
Future needs multi-skilled people	1	5.6
In small companies	1	5.6
Multi-skilled		
Administrative tasks	1	5.6
Run the office	1	5.6
To integrate skills	1	5.6
Training in secretarial skills		
Word processing		
Computer literacy		
Records management	1	5.6
Total	18	100

Out of the 11 respondents who answered this question, 3 respondents indicated, that secretaries should be trained at technical colleges. The importance of multi-skilled

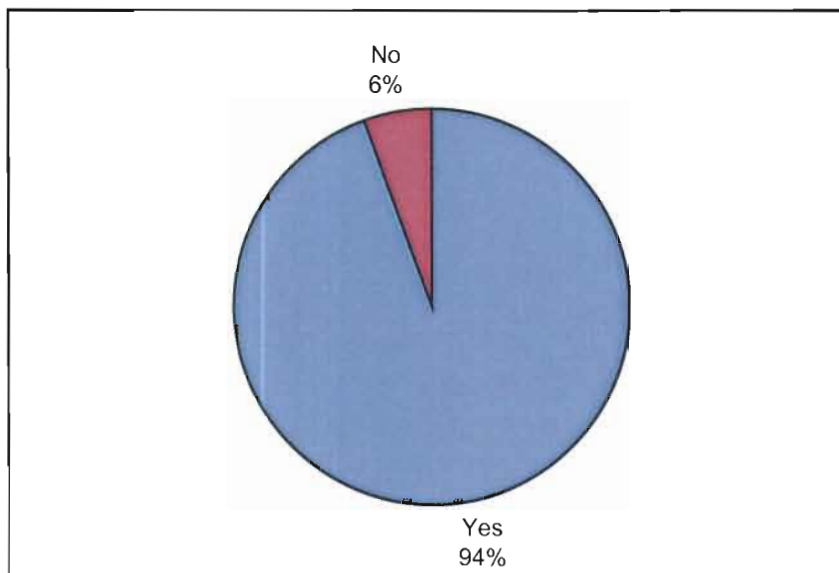


people for the future, plays an important role in training; computer literacy is also specifically mentioned.

#### 4.2.1.14 Need to train office managers (Question 14)

This question requested respondents to indicate whether there is a need to train office managers.

**FIGURE 25: THE NEED TO TRAIN OFFICE MANAGERS**



From the above figure, it is clear that the majority of the respondents (94 per cent) indicated, that there is a need to train office managers rather than secretaries. It is interesting to note that this information given by Technikons, illustrates that the Technikons take the responsibility to train office managers rather than secretaries as a result of the National Diploma: Office Management and Technology offered at these institutions. Technikons also prefer to use the title "office manager" to that of "secretary".

The motivations why office managers need to be trained, are listed, described or named in the table below.



**TABLE 9: MOTIVATIONS FOR TRAINING OF OFFICE MANAGERS**

<b>Motivation</b>	<b>Frequency</b>	<b>%</b>
No response	5	27.8
All office workers need to be trained	1	5.6
To be competent Equipped with values/ethics Computer skills	1	5.6
Because of changes, procedures, cultures (inter-relationships)	1	5.6
Contributes growth and development by strategic decision-making	1	5.6
Different responsibilities Trained in skills Computer literacy Managerial functions	1	5.6
Higher education	1	5.6
Makes decisions and implement	1	5.6
Manage the administrative office	1	5.6
Market research proves it	1	5.6
Provides the foundation	1	5.6
Range of skills	1	5.6
To integrate skills	1	5.6
With changing technology Office environment	1	5.6
<b>Total</b>	<b>18</b>	<b>100</b>

Some of the interesting motivations mentioned i.r.o. the training of office managers, were because of changes in the office environment e.g. procedures and cultures, as well as in technology. Then the importance of computer literacy and computer competency were also listed and also the fact, that an office manager has to manage the office.

#### **4.2.1.15 Vision for curriculum (Question 15)**

This question requested respondents to indicate their vision for a curriculum for training office managers at their institution. From the 18 respondents, 6 respondents did not answer this question. The following responses for a curriculum are listed.

- To re-curriculate
- Theory and practical
- Team top of management
- Practical application
- Management training
- Information management training
- Accounting
- Project management

- Operational management
- Events management
- Lifelong learning
- Computer competency
- Communication competency
- Life skills
- Computer administrative skills
- Management skills
- Business/administrative skills for globalised economy
- Strategic thinking skills
- Technology
- Electronic development
- BTech Office Management and Technology

This concludes the section on the questionnaire handed out to Technikons, which formed part of the quantitative research method.

#### **4.2.2 Questionnaire 2 : participants in the work environment**

This questionnaire was sent to commerce and industry, as well as to employees in training institutions in order to determine the need for office managers in commerce and industry and to develop a model for the training of office managers at the Vaal Triangle Technikon. Table 10 indicates the biographical data of the (n=78) respondents and table 11 indicates the positions of the respondents.

**TABLE 10: ORGANISATIONS**

<b>Organisation</b>	<b>Frequency</b>
No organisation indicated	2
Sasolburg	12
Eskom Transmission Technology	1
Indgro Holdings	3
Johnnic Publishing Ltd	2
MBIZO Events, Sport & Promotions	1
Mediclinic	11
Metsimaholo Local Municipality	2
Myriad International Holdings	1
Nedcor	2
Palesa Corporate Consultants	2
PU for CHO	5
Rand Water	4
Technikon North West	1
UCAR South Africa	3
Vaal Triangle Technikon	26
Total	78

**TABLE 11: POSITIONS**

Organisation	Frequency
No position indicated	4
Acting Dean	1
Acting HOD	1
Administrative Assistant	2
Administrator	6
Business Analyst	1
Coordinator of Secretarial Development	1
Dean	4
Director	1
Executive Manager	1
Executive Secretary	3
HOD	1
HOD Student Counselling	1
Human Resources Consultant	3
Junior Administrator	1
Marketing & Event Manager	1
Medical Receptionist	1
Office Administrator	1
Office Manager	2
Office Professional	9
Personal Assistant	1
Private Secretary	1
Recruitment Consultant	15
Secretary	1
Senior Administrator	3
Senior Counsellor	1
Senior Director Human Resources	1
Senior Secretary	4
Senior Human Resources Clerk	1
Senior Project Manager	1
Senior Secretarial Assistant	1
Typist	1
Vice-Rector	1
WFP Specialist	1
Total	78

#### **4.2.2.1 Section A: Position profile (Question 1.1 to 2.4)**

In this section respondents had to indicate the current position titles at the company, as well as the requirements for this position.

#### **A TITLES**

Apart from the titles "secretary", "office manager" and "personal assistant", various other titles given by the companies, are shown in the table below.

**TABLE 12: OTHER TITLES**

<b>Titles</b>	<b>Frequency</b>
No response	58
Administrative Assistant	3
Administrator	5
Clerk	2
Co-ordinator	1
Communication officer, clerk	1
Executive Secretary	1
Messenger	2
Nurse	3
Operations Manager	1
Receptionist	1
Total	78

## **B REQUIREMENTS**

- **Senior Certificate (Question 2.1)**

This question was not answered by 36 respondents. Out of the total respondents that answered this question ( $n=42$ ), 21 respondents (in other words 50 per cent of the respondents) indicated, that a senior certificate is required for the position secretary.

- **Diploma (Question 2.2)**

From the total respondents that answered this question ( $n=50$ ), 18 respondents (in other words 36 per cent of the respondents) indicated, that a diploma is required for the position secretary.

- **Degree (Question 2.3)**

Out of the total respondents that answered this question ( $n=22$ ), 5 respondents (in other words 23 per cent of the respondents) indicated, that a degree is required for the position office manager. A total of 56 respondents did not answer this question.

- **Experience (Question 2.4)**

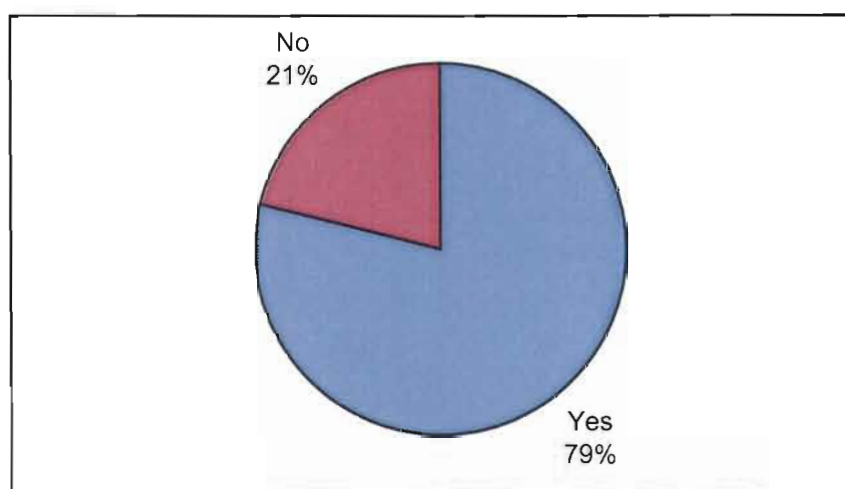
From the 78 respondents, 31 respondents did not answer the question. Out of the total respondents that answered this question ( $n=47$ ), 18 respondents (in other words

38 per cent of the respondents) indicated, that experience is required for the position secretary.

#### 4.2.2.2 Section B: Work environment (Question 1 to 3.6)

This section focused on the management of an office and the administration of information in an office. This was to determine whether the management of an office and the administration of information in an office had changed and why. It was also necessary to determine which measuring tool human resource departments use to evaluate job performance.

**FIGURE 26: HAS THE MANAGEMENT OF AN OFFICE CHANGED?**



From the above figure, 79 per cent of the respondents reported, that the management of an office had changed. The following table indicates when the management of an office changed.

**TABLE 13: WHEN DID THE MANAGEMENT OF AN OFFICE CHANGE**

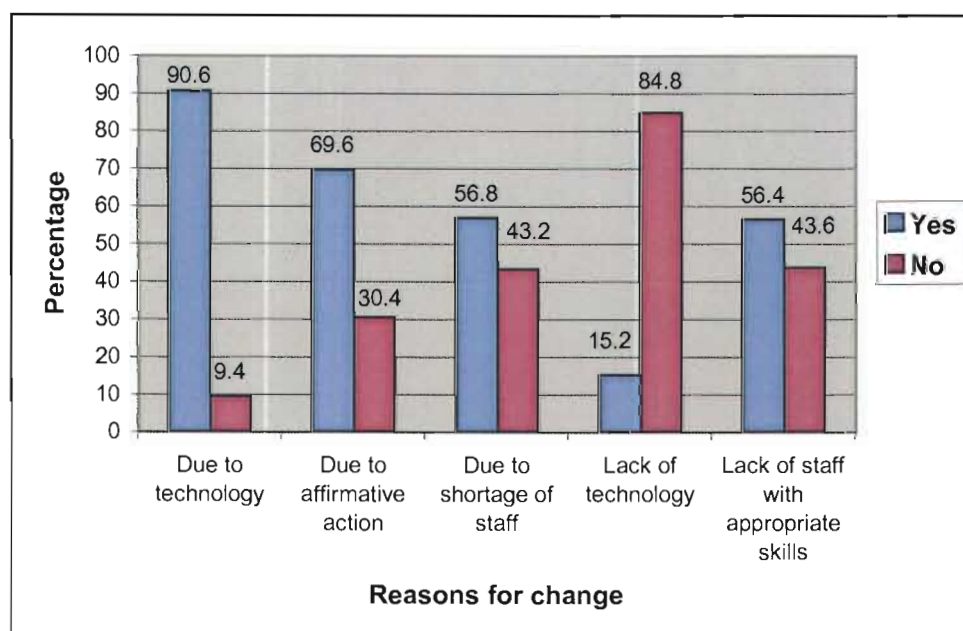
When did it change	Frequency
No response	49
1985	1
1990	3
1992	1
1994	3
1995	1
1995 – 1996	1
± 1996	2
1997	2
1999	2
August 2000	1
2001	3

When did it change	Frequency
July 2001	1
2002	1
Continuously	5
Manager promoted	1
New technology	1
Total	78

From the 29 respondents who replied to the above question, 5 indicated, that the management of an office changed continuously, 3 respondents indicated that it changed from 1990, 1994 and 2001. New technology was also mentioned as a reason when the management of an office changed.

The majority of the respondents (90.6 per cent) indicated, that the main reason for change in the management of an office, is due to the change in technology (see figure 27 below).

**FIGURE 27: CHANGE IN THE MANAGEMENT OF AN OFFICE**



The following table indicates other reasons for the change in the management of an office.

**TABLE 14: OTHER REASONS FOR THE CHANGE IN THE MANAGEMENT IN AN OFFICE**

Reasons for change	Frequency
No response	66
Constant technology changes, roles, expectations	1
Expansion	1
Growth tempo of companies	1
International trends	1
Managers are computer literate, do more challenging tasks, e.g. research	1
Merger with different divisions and group companies	1
Miss management	1
More roles per person, more responsibility	1
Re-engineering	2
Resignation	1
Retirement	1
Total	78

The highlight of the above table, is the constant change in technology that affects the change of management in an office. To keep up with international trends, more roles are expected per person and this adds more responsibility, as well as the trend of re-engineering.

In figure 28, 80 per cent of the respondents indicated, that the administration of information in an office has changed.

**FIGURE 28: CHANGE IN THE ADMINISTRATION OF INFORMATION IN AN OFFICE**

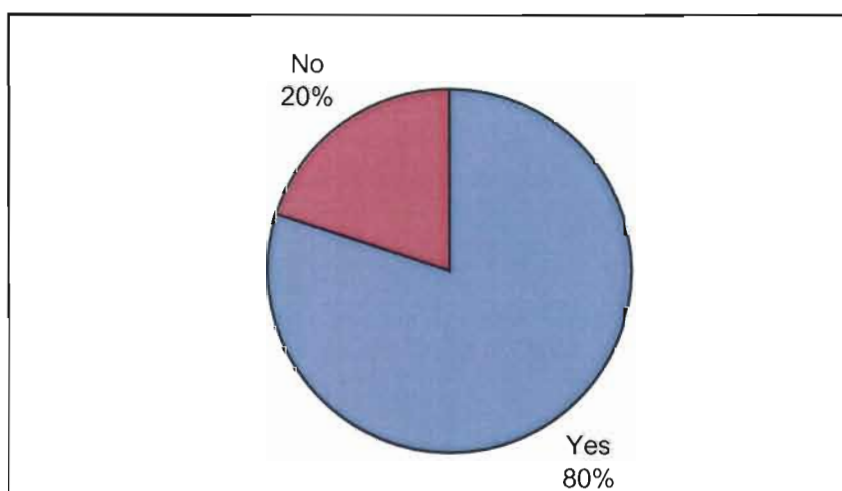
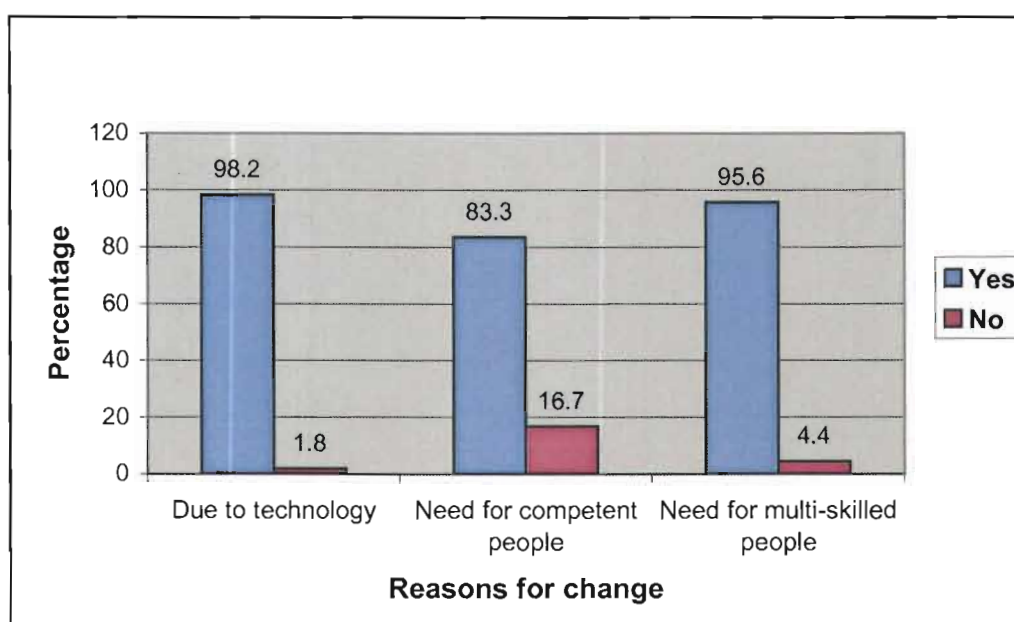


Table 15 indicates when the administration of information in an office changed.

**TABLE 15: WHEN DID THE ADMINISTRATION OF INFORMATION CHANGE**

When did it change	Frequency
No response	65
1990	4
1994	2
1995	1
1996	1
1997	1
1999	1
2001	3
Total	78

The following reasons are given in figure 30 for the changes in the administration of information in an office.

**FIGURE 29: CHANGE IN THE ADMINISTRATION OF INFORMATION IN AN OFFICE**

The majority of the respondents (98.2 per cent) indicated, that the changes in the administration of information in an office, were due to technology. Another 95.6 per cent of the respondents reported, that the changes were due to the need for multi-skilled people, and 83.3 per cent indicated the need for competent people. It is interesting to note that all of the 3 categories were rated very high and are, therefore, all very important in training office managers.



**TABLE 16: OTHER REASONS FOR CHANGE IN THE ADMINISTRATION OF INFORMATION IN AN OFFICE**

Reasons for change	Frequency
No response	75
Good understanding of business	
Prepare presentations	
Latest technology	
E-mail	1
Introduction to ISO	1
Part of change process	1
Total	78

The importance of the change in technology was also mentioned as a reason for the change in the administration of information in an office.

The outcome of which measuring tool is used by the human resource department to evaluate job performance, was a combination of measuring tools namely: interview, questionnaire, job description, job model and performance. The 3 tools that were ranked highest, were performance, job description and interviews.

The other measuring tools that were listed by the respondents, are given in the table below.

**TABLE 17: OTHER MEASURING TOOLS**

Measuring tools	Frequency
No response	69
Competency test	
EPQ (personality test)	1
KPA's	1
In service training	1
Job profile, outputs	1
Job slotting	1
Peer Review	1
PMS	1
Position profile	1
Total quality management	1
Total	78

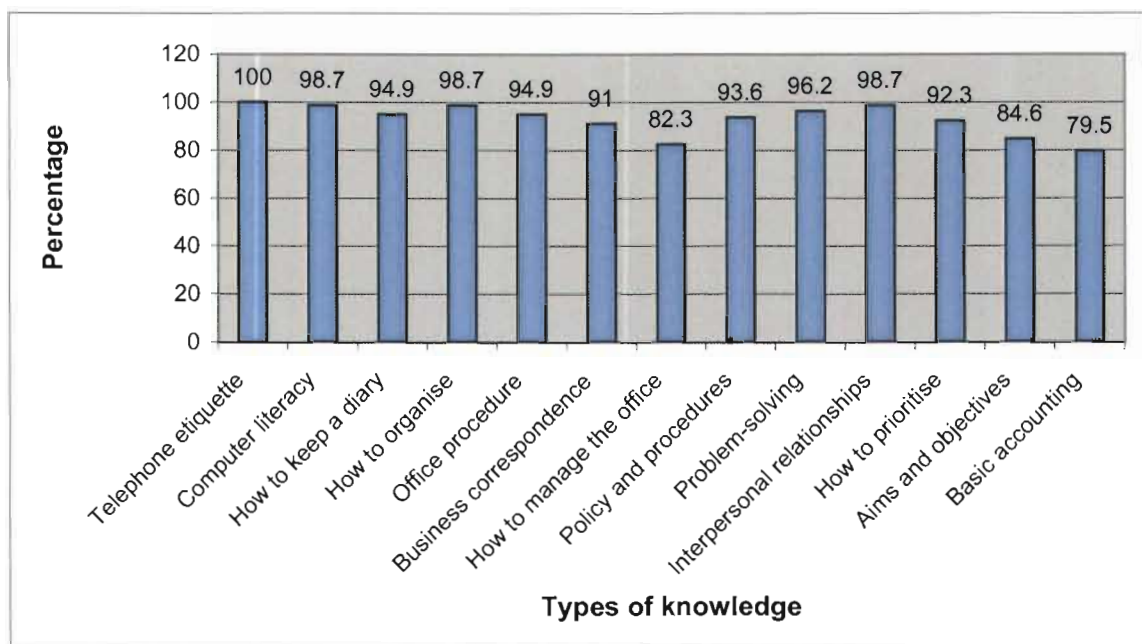
#### **4.2.2.3 Section C: Work profile**

In this section the questions concentrated on the work profile of an office manager and explored what knowledge, skills, values/attitudes are needed in commerce and industry by a competent office manager. It was also necessary to identify whether there is a need for a formal qualification for an office manager and to evaluate a job description for an office manager, secretary and personal assistant.

- **Knowledge required : office manager (Question 1)**

All 78 respondents indicated, that telephone etiquette is of the utmost importance. The other knowledge ranked as of high importance, is computer literacy (98.7 per cent), how to organise (98.7 per cent), interpersonal relationships (98.7 per cent), and problem-solving (96.2 per cent). The following are also rated as very important, namely how to keep a diary (94.9 per cent), office procedures (94.9 per cent), policy and procedures (93.6 per cent), and how to prioritise (92.3 per cent). Knowledge of basic accounting was rated the lowest (79 per cent).

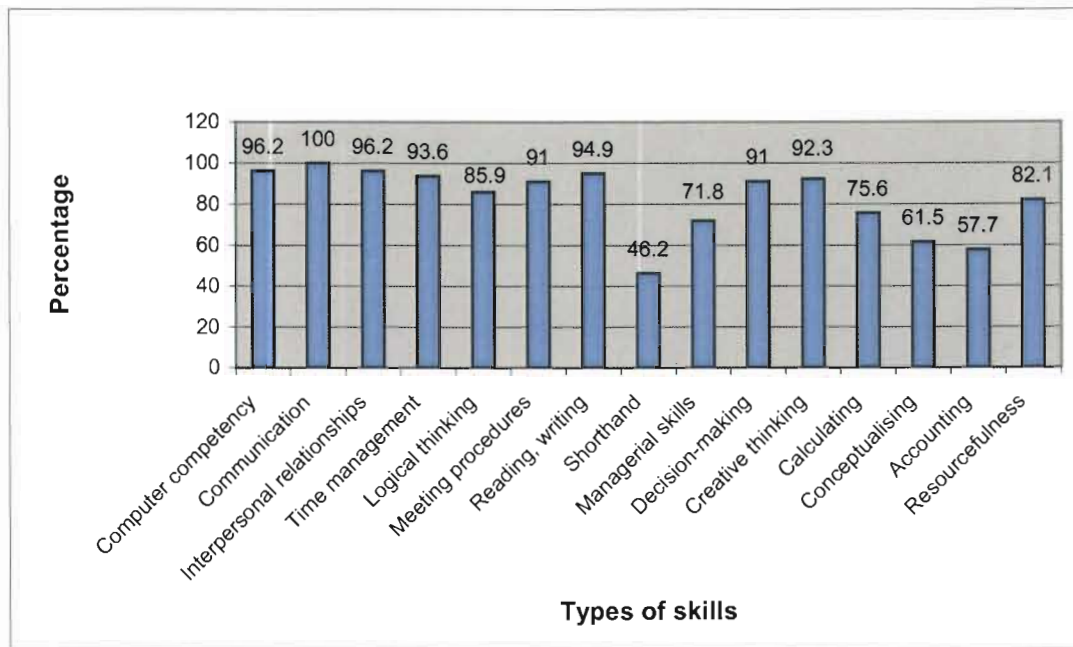
**FIGURE 30: KNOWLEDGE REQUIRED OF AN OFFICE MANAGER**



- **Skills required : office manager (Question 2)**

All respondents (100 per cent) voted communication as the most important skill for an office manager. The skills that are also very important, are computer competency (96.2 per cent), interpersonal relationships (96.2 per cent), reading and writing (94.9 per cent), time management (93.6 per cent), creative thinking (92.3 per cent), decision-making (91 per cent), and meeting procedures (91 per cent). The skills rated the lowest, were accounting (57 per cent) and shorthand (46 per cent).

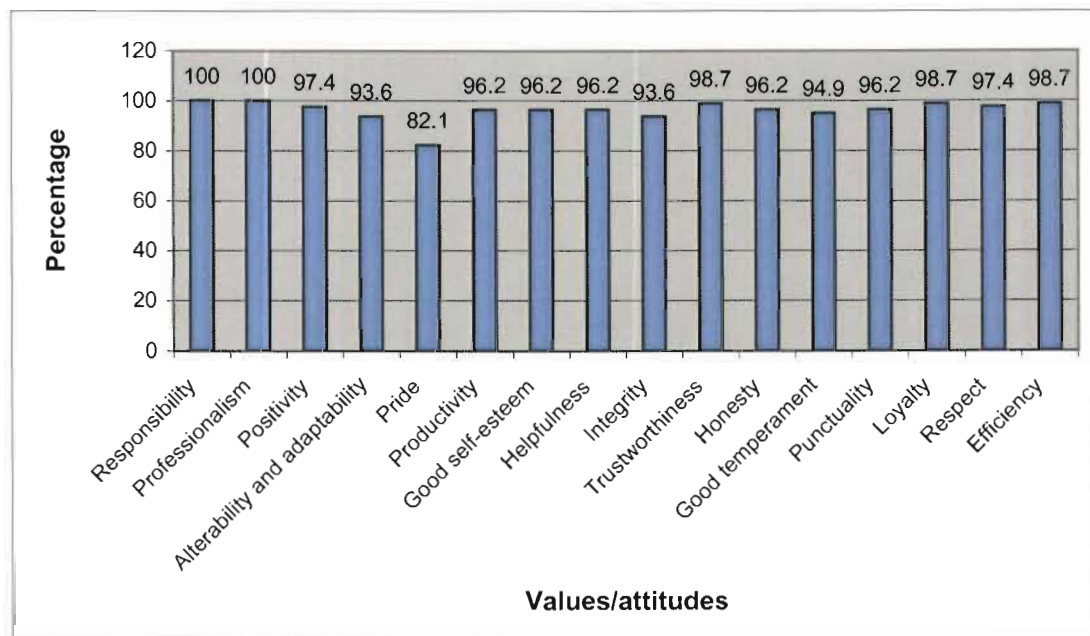
**FIGURE 31: SKILLS REQUIRED OF AN OFFICE MANAGER**



- **Values/attitudes required : office manager (Question 3)**

The following bar chart indicates the percentages allocated to the list of values/attitudes for an office manager, as indicated by the respondents.

**FIGURE 32: VALUES/ATTITUDES REQUIRED OF AN OFFICE MANAGER**



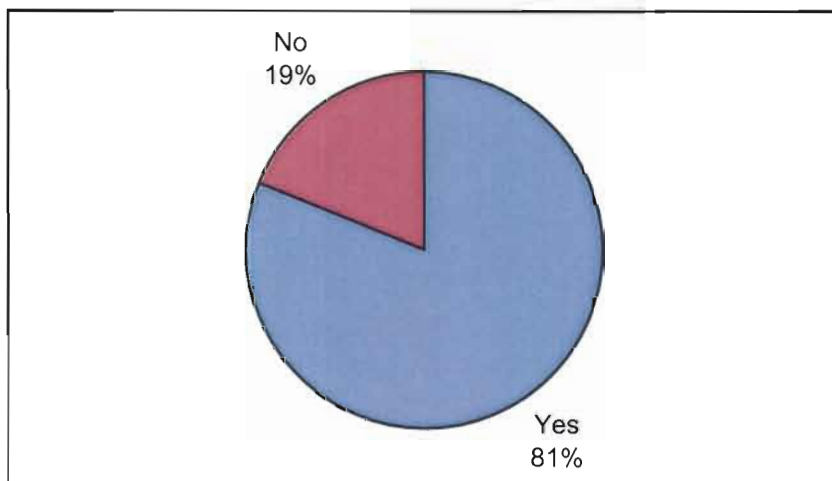
All the respondents (100 per cent) indicated, that responsibility and professionalism are of the highest importance as a value requirement of an office manager. The next

group of importance, is also rated from 98.7 per cent to 93.6 per cent and includes trustworthiness, loyalty, efficiency and positivity. The lowest percentage was for pride (82.1 per cent).

- **Formal qualification : office manager**

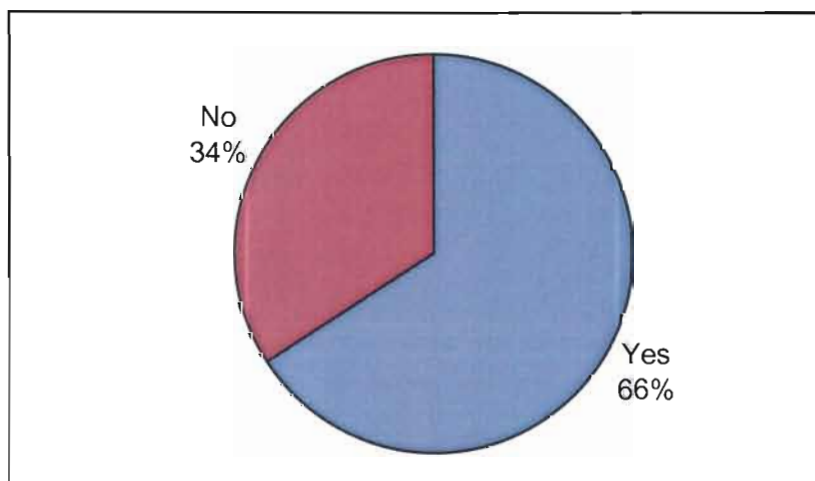
Respondents had to indicate whether there still is a demand for a formal qualification for an office manager, secretary and personal assistant. Most (81 per cent) of the respondents indicated, that there still is a demand for a formal qualification for an entry level.

**FIGURE 33: DEMAND FOR A FORMAL QUALIFICATION**



It is interesting to note, that 66 per cent of the respondents indicated, that they were aware that the VTT trains learners to become office managers.

**FIGURE 34: AWARENESS OF TRAINING OFFICE MANAGERS AT VTT**



#### 4.2.2.4 Section D: Portfolio development (Questions 1 to 5)

In this section, questions were asked in order to obtain information on the perceptions of commerce and industry on the use of portfolios, by means of introducing a potential entry-level employee during an interview.

**FIGURE 35: POTENTIAL ENTRY-LEVEL EMPLOYEES**

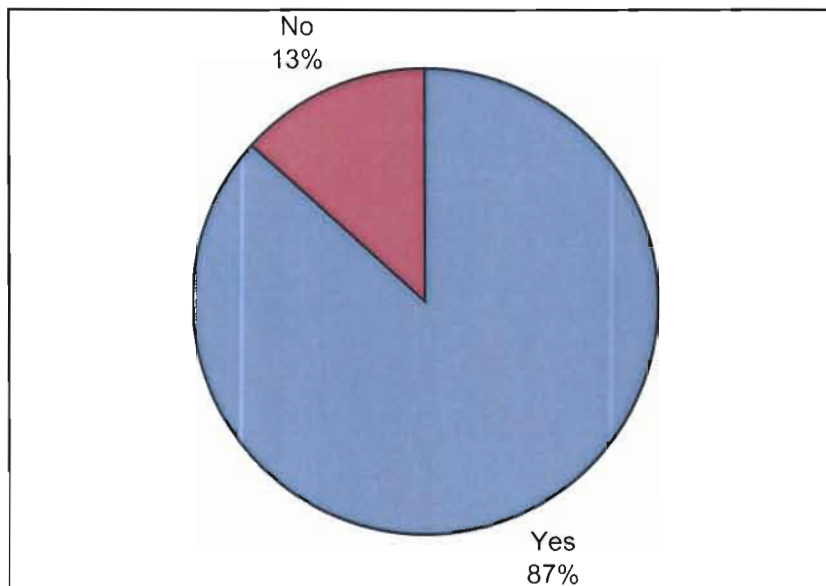
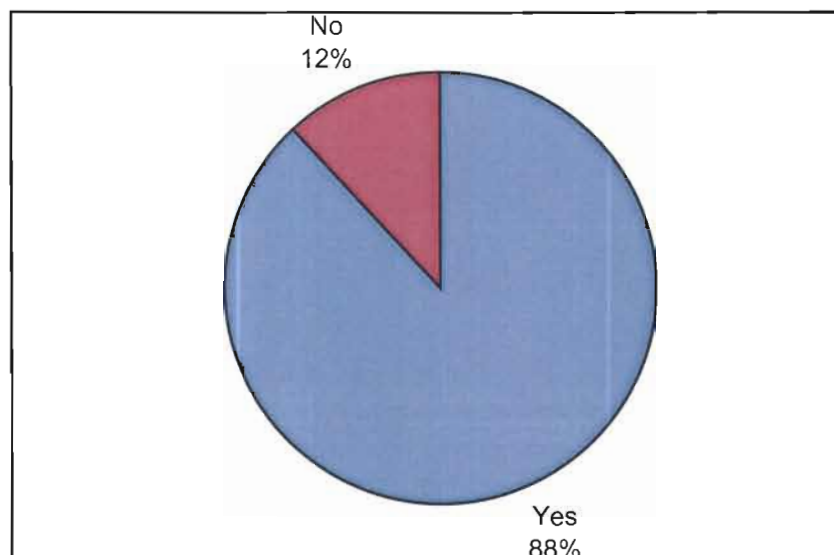


Figure 35 reflects, that 87 per cent of the respondents indicated, that the potential entry-level employees have difficulty conveying their capabilities/skills during an interview.

**FIGURE 36: DIFFERENCE BETWEEN CV AND INTERVIEW**



From the total respondents ( $n=78$ ) 88 per cent indicated, that there is a difference between the perception of a potential entry-level employee when reading his/her CV and or interviewing the person and the same person's performance in the workplace.

In question 3, 84 per cent of the respondents stated, that a portfolio would assist in the appointment of potential entry-level employees.

**FIGURE 37: PORTFOLIO ASSISTANCE**

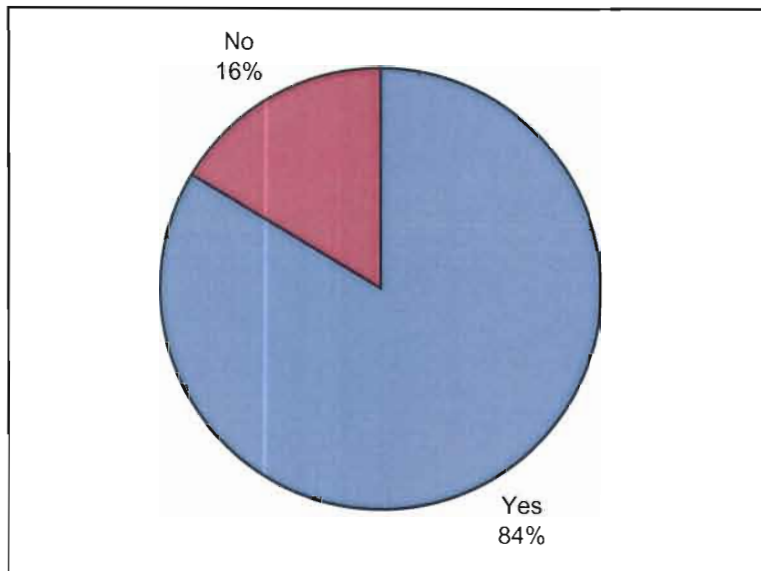
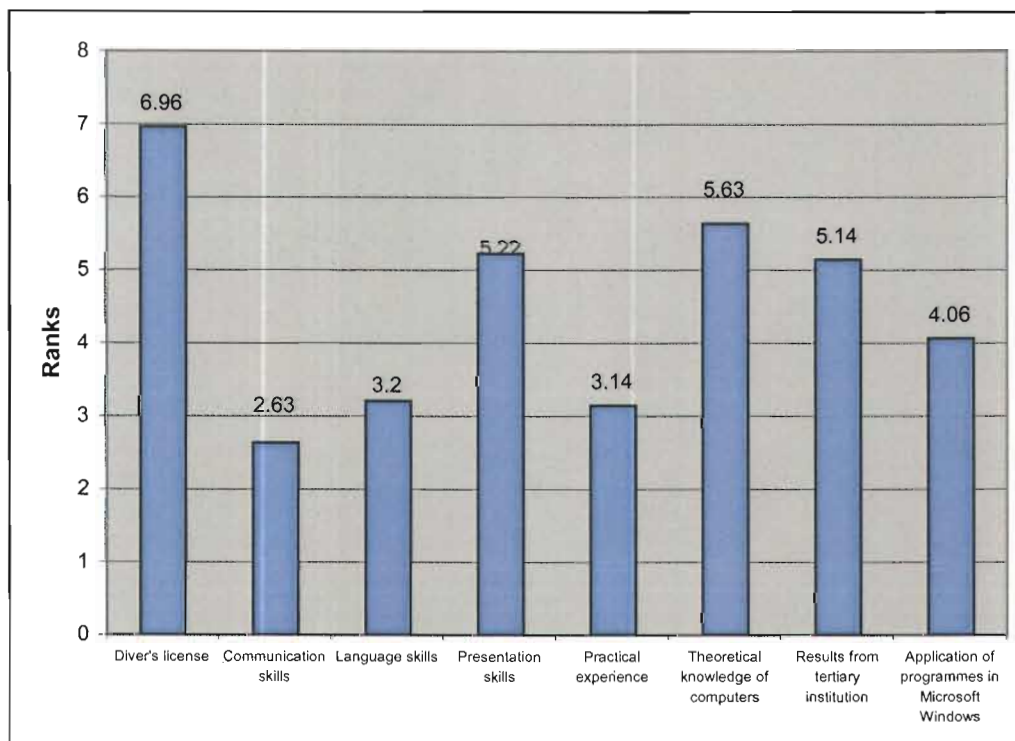


Figure 38 reflects the rank of importance (1 = highest, 8 = lowest) during an interview.

**FIGURE 38: RANK OF IMPORTANCE OF SKILLS DURING AN INTERVIEW**





From the data obtained in the above figure, the ranking of importance of certain skills during an interview (from highest = 1 to lowest = 8) can be summarised as follows: communication skills, language skills, practical experience, application of MS programmes, results from tertiary institutions, presentation skills, theoretical knowledge of computers, and driver's licence.

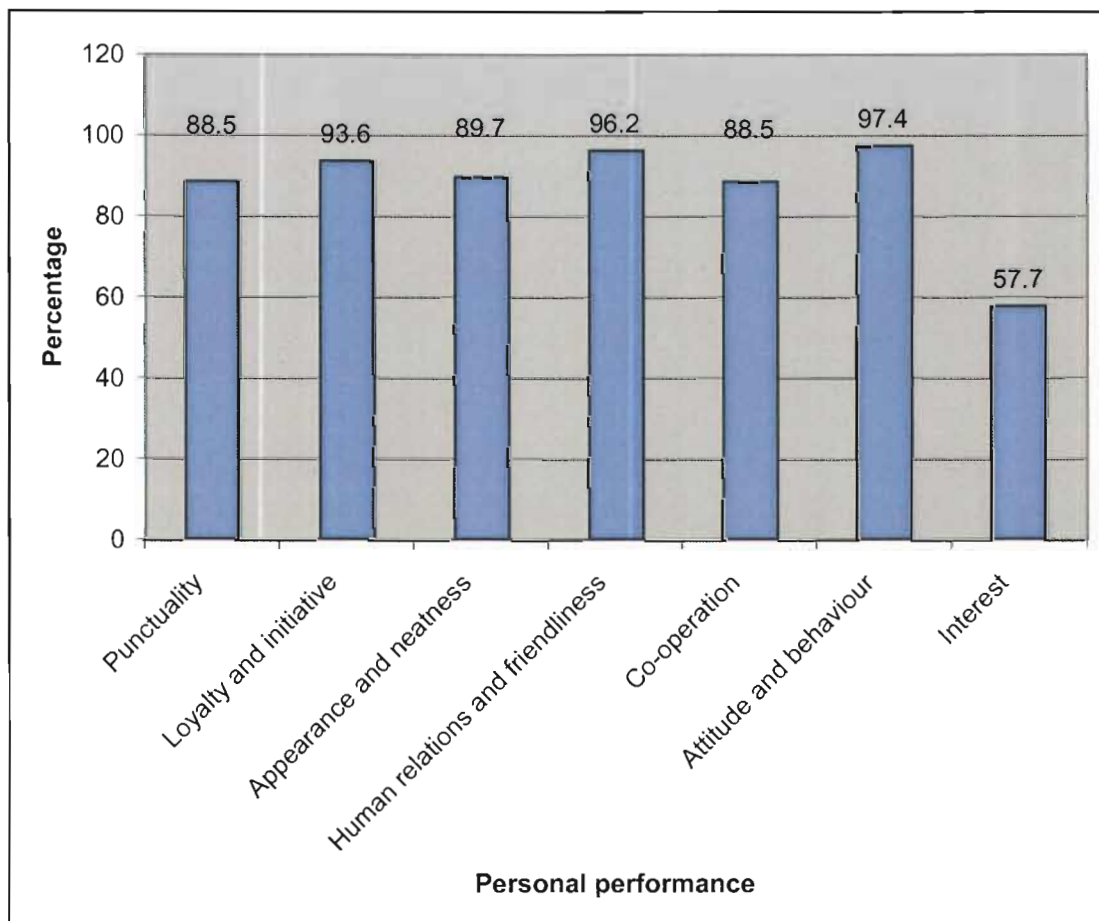
#### 4.2.2.5 Section E: Practical training (Question 1A and 1B)

Section E required information on the experiential training at the VTT in order to meet the requirements set by commerce and industry for this practical component.

- **Personal performance**

Figure 39 reflects the importance of the areas of personal performance during a work situation.

**FIGURE 39: PERSONAL PERFORMANCE**



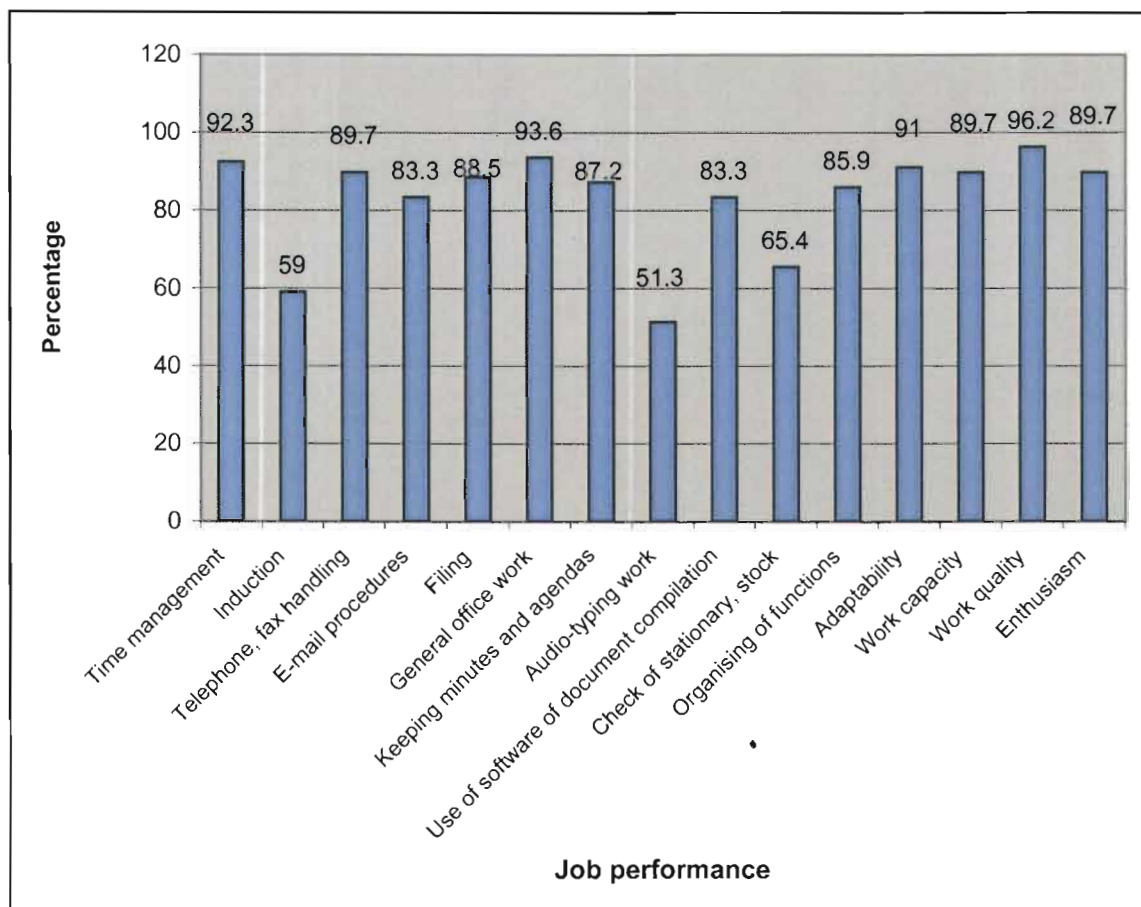
The respondents indicated the following areas for personal performance in order of importance: attitude and behaviour, human relations and friendliness, loyalty and initiative, appearances and neatness, co-operation, punctuality, and interest.

Other areas listed by the respondents, were eagerness, independence, reliability, honesty, and self-esteem.

- **Job performance**

The aim of this question, was to determine the importance of the following areas in job performance during a working situation.

**FIGURE 40: JOB PERFORMANCE**



The outcome of the above-mentioned question can be summarised as follows in order of high importance: 96.2 per cent for work quality; 93.6 per cent for general office work; 92.3 per cent for time management; 91 per cent for adaptability; 89.7 per cent for telephone and fax handling, work capacity and enthusiasm. The following



areas were rated as being of low importance: 51 per cent for audio-typing, 59 per cent for induction, and 65.4 per cent for stock/stationery checking.

Another area of importance mentioned for evaluating job performance, is creativity.

The previous section was an interpretation of the analysis and results of the quantitative method utilised for the investigation. The following section of the combination design, namely the qualitative method will now be discussed.

### 4.3 QUALITATIVE RESEARCH

The following deals with the implementation and the results concerning the qualitative method used in this study. The sample and its characteristics are discussed in chapter 3. The data will be discussed in the following order: questionnaires, interviews, observations, and focus groups.

#### 4.3.1 Questionnaire for lecturing staff of Office Management and Technology

As previously mentioned (§4.2.1), the questionnaire was completed at an Office Management and Technology workshop held at the Cape Technikon, which was represented by 14 Technikons. The following open-ended questions will be discussed.

##### 4.3.1.1 Other knowledge : secretary versus office manager (Question 7, 8)

From the total number of respondents ( $n = 18$ ) only 7 (38.9 per cent) of the respondents listed other knowledge required of both a secretary and an office manager.

**TABLE 18: OTHER KNOWLEDGE REQUIRED OF A SECRETARY AS VERSUS AN OFFICE MANAGER**

Other knowledge : secretary	Other knowledge : office manager
Access information	Access information
Communication	Communication
Meeting procedures	Meeting procedures
Telephone etiquette	Telephone etiquette
Financial management	Office procedures
Interpersonal communication	Research methodology
Budgets	Project management
Professionalism	Psychology
Filing	Supervising
Planning business functions	Appraisal performance
	Basic administrative knowledge

The above table highlights the items listed by the respondents to indicate the other knowledge required for both secretary and office manager, as well as similarities and opposites for both of these titles.

#### 4.3.1.2 Other skills : secretary versus office manager (Question 9, 10)

Only 4 respondents (22.2 per cent) from the total respondents ( $n = 18$ ) mentioned other skills required of a secretary while only 3 respondents (16.7 per cent) listed other skills required of an office manager.

**TABLE 19: OTHER SKILLS REQUIRED OF A SECRETARY AS VERSUS AN OFFICE MANAGER**

Other skills : secretary	Other skills : office manager
Problem-solving	Problem-solving
Listening	Listening
Organisational skills	Teaching
Human public relations	Human relations
Records management	Motivation
Filing	Logical thinking
	Creativity
	Decision-making
	Shorthand/speedwriting
	Dictaphone

The above table gives a clear indication of the skills of a secretary, as well as OF an office manager and highlights the difference in the skills required of a secretary and of an office manager.

#### 4.3.1.3 Other values/attitudes : secretary versus office manager (Question 11, 12)

In this question only 5 respondents (27.8 per cent) listed other values/attitudes required of a secretary and 4 respondents (22.2 per cent) listed other skills required of an office manager.

**TABLE 20: OTHER VALUES/ATTITUDES REQUIRED OF A SECRETARY VERSUS AN OFFICE MANAGER**

Other values/attitudes : secretary	Other values/attitudes : office manager
Accountability	Accountability
Confidentiality	Confidentiality
Trustworthy	Trustworthy
Tact	Tact
Punctual	Emotional stability
Efficient	Positive attitude

Other values/attitudes : secretary	Other values/attitudes : office manager
Give your best	Flexibility
Motivated	
Energetic	
Honesty	
Courteous	
Loyalty	
Respect	

The information in table 20 above provides a distinction between the other values/attitudes required of a secretary as opposed to an office manager.

#### 4.3.2 Questionnaire 2 : participants in the work environment

This questionnaire focuses on commerce and industry, as well as employees in the work environment (§4.2.2). In commerce and industry various titles are used to describe the same position, therefore the following titles are grouped together and are used as office manager or secretary or personal assistant. The following open-ended questions will be discussed.

##### 4.3.2.1 Other knowledge (Section C: Question 1)

The following table specifies other knowledge required of an office manager, secretary, or personal assistant.

**TABLE 21: OTHER KNOWLEDGE : OFFICE MANAGER, SECRETARY, P/A**

Other knowledge required	
<ul style="list-style-type: none"> <li>• Business acumen</li> <li>• Business etiquette</li> <li>• Corporate culture</li> <li>• Customer service</li> <li>• IT system knowledge</li> <li>• International professionalism</li> <li>• Language</li> </ul>	<ul style="list-style-type: none"> <li>• Minutes taking</li> <li>• Project management</li> <li>• Psychology</li> <li>• Professionalism</li> <li>• Self-motivation</li> </ul>

Some of the items that the respondents listed as knowledge requirements in the above table are: business acumen, conflict management, IT system knowledge, presentation skills, desktop publishing, e-mail, internet, knowledge of business etiquette, corporate culture, international professionalism, and project management.

#### 4.3.2.2 Other skills (Section C: Question 2)

Other skills required for an office manager, secretary, or personal assistant mentioned by respondents, are listed in table 22.

**TABLE 22: OTHER SKILLS : OFFICE MANAGER, SECRETARY, P/A**

Other skills required
<ul style="list-style-type: none"><li>• Accounting</li><li>• Assertiveness</li><li>• Business writing</li><li>• Communication skills (also written)</li><li>• Conflict management</li><li>• Customer relations</li><li>• Desktop publishing</li><li>• E-mail</li><li>• Internet</li><li>• Problem-solving skills</li><li>• Presentation skills</li><li>• Proofreading</li><li>• Stress management</li><li>• Time management</li><li>• Working with teams</li><li>• Work under pressure</li></ul>

From the above table, the following are noted: assertiveness, flexibility, conflict management, presentation skills, proofreading, and working with teams.

#### 4.3.2.3 Other values/attitudes (Section C: Question 3)

Other values/attitudes specified by the respondents, are listed below.

**TABLE 23: OTHER VALUES/ATTITUDES : OFFICE MANAGER, SECRETARY, P/A**

Other values/attitudes
<ul style="list-style-type: none"><li>• Honesty</li><li>• Compassion</li><li>• Empathy</li><li>• Independence</li><li>• Openness for opinions</li><li>• Self-accountability</li><li>• Team contribution</li><li>• Willingness to learn</li></ul>

As mentioned previously (§4.3.2), that different titles are used in industry, the following questions will define the various titles used in industry.

#### 4.3.2.4 Definition : office manager (Question 5)

Respondents had to define the title "office manager". From a total of 78 respondents, 56 (71.7 per cent) answered this question.

**TABLE 24: DEFINITION : OFFICE MANAGER**

Definition of an office manager	
<ul style="list-style-type: none"><li>• A leader, mentor, sensitive communicator, helper, team player</li><li>• Efficient</li><li>• Assists in decision-making, planning</li><li>• Business management</li><li>• Meeting all knowledge, skills, values/attitudes (§4.2.2.3)</li><li>• Communication and leadership skills</li><li>• Organises work and people in the office</li><li>• Competent decision-maker, solve problems</li><li>• Computer literate with experience in general admin. work, manages the office</li><li>• Controlling more than one office, more than one secretary</li></ul>	<ul style="list-style-type: none"><li>• Co-ordinates all administrative functions</li><li>• Co-ordinates outputs, diary, budgets, public relations</li><li>• Delegates tasks from management, statistics</li><li>• Empowers secretary</li><li>• Initiative, controlled, calm, handles pressure, stays abreast</li><li>• Punctual, professional</li><li>• Multi-skilled</li><li>• Office manager manages the office</li><li>• Excellent hostess, answers to questions, friendly, helpful, flexible, adaptable</li><li>• Business correspondence, interpersonal relationships, basic accounting</li></ul>

In general, the respondents said, that an office manager manages all the different aspects in an office; that is, making appointments, handling diaries, budgets, business correspondence; ensuring computer literacy and is multi-skilled. It is also very clear, that leadership, interpersonal relationships, being team player, communication, and the knowledge, skills, values/attitudes listed in the questionnaire (Section C: Question 1, 2, 3) form part of the definition of an office manager.

#### 4.3.2.5 Definition : secretary (Question 6)

From the total respondents ( $n=78$ ) 69.2 per cent responded to this question where they had to define the title "secretary".

**TABLE 25: DEFINITION : SECRETARY**

Definition of a secretary	
<ul style="list-style-type: none"><li>• A leader, mentor, sensitive communicator, helper, team player</li><li>• Acts on instructions</li><li>• Administrative work, portrays good image of company</li><li>• Co-ordinates outputs, diary, budgets, public relations</li><li>• Typing, filing, faxing, photocopying, order-</li></ul>	<ul style="list-style-type: none"><li>• Assistant to manager, necessary skills qualifications, responsibility, initiative, makes decisions</li><li>• Assistant, less experience, starting point</li><li>• Competent person, multi-skilled, works accurately under pressure, friendly, professional</li><li>• Contact between manager, clients, staff</li></ul>

Definition of a secretary	
<ul style="list-style-type: none"> <li>ing stationery, travel arrangements, arranging meetings, taking of minutes, serving tea/coffee</li> <li>Meeting all knowledge, skills, values/ attitudes (§4.2.2.3)</li> <li>Takes control, makes decisions, runs office effectively and efficiently</li> </ul>	<ul style="list-style-type: none"> <li>Assists manager, responsible for general administrative tasks</li> <li>Compiles documents</li> <li>Manages office, organises managers, professional, personal daily planner</li> <li>Reception, telephone, diary, computer literacy, typing of letters</li> <li>Right hand of employer</li> </ul>

As deduced from the above information, the respondents in general felt, that a secretary is responsible for all the basic administrative work in an office; has less experience; has the need to be computer literate and multi-skilled; is a leader; a good communicator; assists the manager; makes decisions and complies i.r.o. the knowledge, skills, values/attitudes listed in the questionnaire (Section C: Question 1, 2, 3).

#### 4.3.2.6 Definition : personal assistant (Question 7)

The aim of this question, was also to find a definition for a personal assistant. From the total of 78 respondents, 45 (57.6 per cent) answered this question.

**TABLE 26: DEFINITION : PERSONAL ASSISTANT**

Definition of a personal assistant	
<ul style="list-style-type: none"> <li>A leader, mentor, sensitive communicator, helper, team player, arranges complete life of employer, also personal life</li> <li>Assists in decision-making, planning</li> <li>Assists with specific management tasks, secretarial support</li> <li>Combination of office manager and secretary</li> <li>Co-ordinates outputs, diary, budgets, public relations</li> <li>Effective smooth running of office</li> <li>Empowers secretary</li> <li>Focuses on smaller unit of organisation, attention given to direct manager</li> <li>Handles office as a manager</li> </ul>	<ul style="list-style-type: none"> <li>Higher level of competency than secretary in qualification</li> <li>Knows business of company</li> <li>Runs office, efficiency, taking initiative</li> <li>Makes decisions, answers correspondence, deals at executive level</li> <li>Professional person with values, skills, knowledge</li> <li>Right hand man, assistant to manager, informed decision-making</li> <li>Well-organised, interpersonal relationships, helpful</li> <li>Works closely with top level manager, added responsibility, performing personal tasks</li> </ul>

From the information obtained in the above-mentioned table, it is clear that that the respondents indicated, that a personal assistant assists a manager with specific management tasks, as well as in decision-making and planning. The following attributes are also mentioned: leadership, good communicator, team player, initiative, efficiency, interpersonal relationships, professionalism, multi-skilled, and doing all the administrative functions in an office. It was also highlighted, that a secretary runs an office.

#### 4.3.2.7 Requirements for a training programme (Question 9)

In this question, the respondents had to indicate the requirements for a training programme to fulfil the needs in commerce and industry. From the total of 78 respondents 37 (47.4 per cent), respondents listed the following as requirements.

**TABLE 27: REQUIREMENTS FOR A TRAINING PROGRAMME**

Requirements for a training programme	
<ul style="list-style-type: none"><li>• Accounting</li><li>• Assertiveness</li><li>• Business management</li><li>• Business etiquette</li><li>• Computer competency</li><li>• Computer literacy</li><li>• English HG</li><li>• Function/event management</li><li>• Guidelines to manage boss</li><li>• Hands-on/practical experience</li><li>• Holistic skills based business context</li><li>• Interpersonal relationships</li><li>• Knowledge (Section C: Question 1)</li><li>• Life skills</li><li>• Office management</li></ul>	<ul style="list-style-type: none"><li>• Organising</li><li>• Personality profile for office manager</li><li>• Presentation skills</li><li>• Public relations</li><li>• Relevant needs in industry</li><li>• Role play situations</li><li>• Skills (Section C: Question 2)</li><li>• Speedwriting</li><li>• Telephone etiquette</li><li>• Time management</li><li>• Typing (pre-requisite)</li><li>• Typing speed</li><li>• Values/attitudes (Section C: Question 3)</li><li>• Verbal communication</li><li>• Written communication</li></ul>

The above outcome highlighted the importance of practical computer skills and the in-depth training i.r.o. the knowledge, skills, and values/attitudes listed in section C of the questionnaire. Other interesting items listed, are: function or event management, speedwriting and role play situations.

#### 4.3.2.8 Why employees have difficulty in conveying skills during an interview (Section D: Question 1)

As previously mentioned (Figure 35), 87 per cent of the respondents indicated, that potential employees have difficulty in conveying their skills during an interview. In this question, the respondents had to motivate why employees find it difficult to convey their skills or capabilities during an interview. From the 78 respondents, 49 (62.8 per cent) respondents gave the following reasons as motivation.

**TABLE 28: MOTIVATION REGARDING AN INTERVIEW**

<b>Motivation for lack of conveying skills during an interview</b>	
<ul style="list-style-type: none"> <li>• Are nervous</li> <li>• Cultural differences</li> <li>• Do not know climate of company</li> <li>• Uncertain about skills</li> <li>• Can only evaluate on practical application</li> <li>• Interview and real situation differs</li> <li>• Lack of self-confidence</li> <li>• Interested about their needs</li> </ul>	<ul style="list-style-type: none"> <li>• Cannot sell themselves</li> <li>• CV's are not focused on posts</li> <li>• Not trained in interviewing situation</li> <li>• Feel intimidated</li> <li>• Cannot deal with pressure in workplace</li> <li>• Lack of experience</li> <li>• Language problem</li> <li>• Communication problem</li> </ul>

From the above table, the following were highlighted: nervousness, not trained in interviewing, lack of self confidence, and inability to communicate.

#### **4.3.2.9 Difference between CV/interview and performance in the workplace (Section D: Question 2)**

Figure 36 indicates (88 per cent), that the CV or interview differs from the person's performance in the workplace. This question wanted to determine what the reasons were for the difference between the CV or interview and the workplace.

**TABLE 29: MOTIVATION REGARDING A CV/INTERVIEW**

<b>Motivation for difference between CV/interview and performance in workplace</b>	
<ul style="list-style-type: none"> <li>• Affirmative action</li> <li>• CV mere subjective, not very true</li> <li>• CV or interview does not reflect practical performance</li> </ul>	<ul style="list-style-type: none"> <li>• Not capable to do the work</li> <li>• CV incomplete</li> <li>• Do not know how to write a CV</li> <li>• CV/interview does not reveal character</li> </ul>

From the 78 respondents, 48 (61.5 per cent) gave their reasons for the above question. In the above table the majority of the respondents highlighted two main reasons, namely: that a CV is not a true reflection of the person, and that there is no proof of practical performance.

#### **4.3.2.10 Will a portfolio assist in appointing employees? (Section D: Question 3)**

As mentioned previously in figure 38, 84 per cent of the respondents indicated, that a portfolio would be of assistance in appointing potential employees. The motivation for this question is given in the table below.



**TABLE 30: MOTIVATION REGARDING A PORTFOLIO**

Motivation why a portfolio will assist in appointing employees	
<ul style="list-style-type: none"> <li>• Gives additional information of person</li> <li>• Better perception of candidate</li> <li>• Gives indication of what was learned</li> <li>• Is a presentation of actual work completed</li> <li>• More focused on human being and experience</li> <li>• Gives more information over time of real work and experience</li> <li>• Combines theory and practice</li> <li>• Will be able to find someone with the right experience on paper</li> </ul>	<ul style="list-style-type: none"> <li>• Appoint through ability</li> <li>• Complete profiles can proof more</li> <li>• Must be focused on post</li> <li>• Knows what to expect from employee</li> <li>• Must not contain too much, time of essence at workplace</li> <li>• True reflection of competencies, skills, knowledge and abilities</li> <li>• Shows professionalism and capabilities</li> <li>• Gives relevant information: motivation letters, previous employers/lecturers, handy event/function management, course co-ordinating</li> </ul>

From the total respondents of 78, 50 per cent answered this question. The main reasons highlighted, were: it gives additional information, it can give more proof of a candidate, and that the practical section are included.

#### 4.3.2.11 Comments regarding portfolios (Section D: Question 5)

Respondents were requested to give any other comments on the concept of portfolios.

**TABLE 31: COMMENTS ON PORTFOLIOS**

Comments on portfolios	
<ul style="list-style-type: none"> <li>• Do it in many disciplines, then it could benefit</li> <li>• Portfolios are important</li> <li>• Keep up to date</li> <li>• Must incorporate as wide a range of skills as possible, true representative</li> </ul>	<ul style="list-style-type: none"> <li>• Encourage to keep portfolio, is used to sell his/her skills</li> <li>• Look at volume of application, due to time constraints</li> </ul>

Only 9 respondents from a total of 78, gave their views on portfolios. In the above table it is clear, that portfolios are important when it is kept up to date and contains the relevant information.

This concludes the section on questionnaires. The next section will deal with interviews used as a qualitative research method.

#### 4.3.3 Interviews

The implementation and results of the information obtained from the interviews with employees from commerce and industry, will be discussed. The characteristics of

interviews are discussed in chapter 3. The researcher made appointments with individuals and visited them at the company where some of the important questions of questionnaire 2 (§4.3.2) were discussed. The results of these questions will be given as quoted by the respondents. Where the findings of respondents are more or less the same, only a few will be given to illustrate what was said. The information that is used, will not be determined by the total of respondents but by the relevance of the answers to the questions.

Interviews were conducted with business organisations which included: Staffgro from Indgro Holdings, Palesa Secretarial Consultancy, and Transnet. A unit standards generating workshop to develop a unit standards qualifications framework for the secretarial/administration profession (Seta Services), was also attended. The following questions were asked during the interviews.

- Has the management of an office changed and how?
- Has the administration of information in an office changed and how?
- What measuring tool is used by the human resource department to evaluate job performance?
- What knowledge is required of a secretary/office manager/personal assistant/office professional?
- What skills are required of a secretary/office manager/personal assistant/office professional?
- What values/attitudes are required of a secretary/office manager/personal assistant/office professional?
- Is there still a need to train secretaries/office managers/personal assistants/office professionals?
- What is your vision of a training programme for office managers at the Vaal Triangle Technikon?
- What is your definition of a secretary?
- What is your definition of an office manager?
- What is your definition of a personal assistant?
- What is your definition of an office professional?

#### **4.3.3.1 Has the management of an office changed? (Question 1)**

The following answers were given to the above question and indicate that, with the empowerment given to the secretary to manage the office, roles and expectations in the office changed.

*"In the past couple of years, yes. Previously the manager 'managed' the office. He made certain decisions regarding the day to day management of the office, which his secretary then just adhered to. Today the secretary plays the role of 'office professional' and manages the office but also still supporting the manager."*

*"Yes, with constant technology changes, roles and expectations."*

*"No, little change - now more empowered to manage the office."*

#### **4.3.3.2 Has the administration of information in an office changed? (Question 2)**

The answers to this question indicated, that the administration of information in an office changed with the latest technology, concomitant with a need for improved competencies.

*"Yes, with the latest technology: e-mail, office 2000. Good understanding of business, prepare presentations."*

*"Due to the different technologies available the way in which offices are administered, has certainly changed in a number of ways. Technology has brought to the office improved competencies. Better customer service, due to the use of electronic mediums which allows faster and better communication."*

#### **4.3.3.3 Is there still a need to train a secretary/office manager/personal assistant/office professional? (Question 3)**

The respondents agreed that training is still an essential aspect of the necessities for an office manager.

*"Yes, more! Management must be more empowering."*

*"Yes, it is critical to update training - lifelong learning."*

#### **4.3.3.4 Vision for a training programme/curriculum (Question 4)**

The following important items were listed as part of a training programme/curriculum for office managers at the VTT.

*"Holistic; skills-based; business context; presentation skills; typing ability; computer literacy: Excel, PowerPoint, charts/labels, documents; action plan/aspirations; philosophy; CV; achievements."*

*"Coach in office programmes, practical handling of equipment, MS projects, typing skills, manage system management, filing."*

*"Skills based exercises: proofreading, professional business writing, travel arrangements, numeric reasoning, organisational skills, typing, telephone message taking, diary management, internal communication, problem-solving."*

*"Training in skills as well as self-development."*

#### **4.3.3.5 Important areas for evaluation during experiential training (Question 5)**

The following were indicated as important for evaluation of students during their experiential training.

*"Working on their own and making decisions on their own. Handling situations with diplomacy. Excellent customer relations (satisfied customers!). Professional conduct in all circumstances. Ability to learn by experience and implementing new skills."*

#### **4.3.3.6 Will a portfolio assist in appointing employees? (Question 6)**

The respondents indicated the following reasons for implementing a portfolio for assisting employers in appointing employees.

*"I am sure it will be of assistance. This will give an overall idea of who the person is and what their abilities and capabilities are, without just having the details of a CV. I would also suggest that such a profile should typically contain information such as strengths, weaknesses, development areas, etc."*

This concludes the section on interviews. The following qualitative research method that will be discussed, is observations.

#### **4.3.4 Observations**

The research question posed in chapter 1 (§1.2.3) involved a model for the training of office managers through the use of AL in the subject information administration. As previously indicated (Figure 13), the researcher made use of the AL cycle to observe the learning situation in both theory and the practical modules. The following observations have been made:

- **Experience**

The researcher has 20 years teaching experience in the subject information administration and acted as examiner and moderator of the subject on all 3 levels. Other media that contributed to the experience, are workshops attended on improving teaching and learning methods: AL and AR, focus groups, OBE assessment and modularisation. The learners learn through their concrete experience during practical class assignments.

- **Identify the problem**

From examination results and class tests, it was observed that there was a problem concerning both theory and practical modules in the subject information administration. In levels 1 and 3 the researcher requested learners to write down what problems they encountered with these modules. These problems were identified and discussed with the learners.

- **Reflect**

The learners had group discussions and both learners and facilitator critically reflected on the problems, with possible methods for solving the problems through their experience. Both had to ask the question, what worked and what did not work in previous experience.

- **Experiment**

Different learning and assessment methods will be utilised for the theory as well as for the practical modules.

- **Analyse/generalise**

The experiments will be analysed and generalised.

- **Plan solutions**

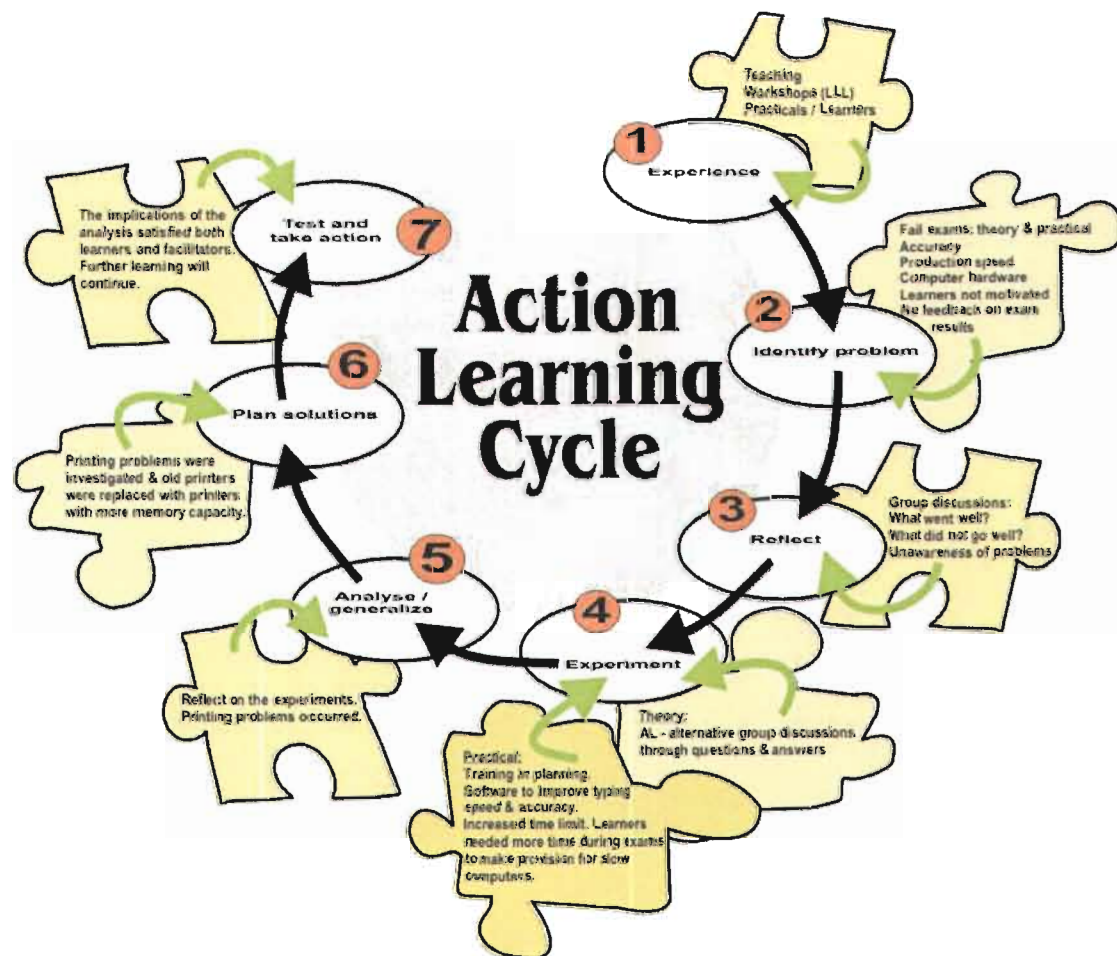
From the analysis, further solutions can be planned and implemented.

- **Test and take action**

Testing the implications of the experiment in new experience.

An AL cycle (Figure 41) for both modules for the subject information administration is illustrated below.

**FIGURE 41: AN AL CYCLE FOR ADMINISTRATION OF INFORMATION (ADAPTED FROM MARQUARDT 1999:36). GRAPHICS: D. WILSON**



The next method of qualitative research that will be discussed, is focus groups.

#### 4.3.5 Focus Groups

The focus groups conducted for the study, consisted of lecturers from the department Office Management and Technology from the Cape Technikon; EMS conference (Annexure E) attended by lecturers from the department Office Management and Technology, secretaries, and administrators (Table 32); and the Boleswa Symposium (Annexure F) attended by lecturing staff (Table 32). For this study, focus groups were used as primary sources, preliminary data sources, as well as with additional qualitative data collection methods (§3.5.2.4). The composition of the groups were as follows.

**TABLE 32: THE COMPOSITION OF THE THREE FOCUS GROUPS**

<b>Cape Technikon</b>	Lecturers from the department Office Management and Technology.	The size of the group was six.
<b>EMS</b>	Lecturers from the department Office Management and Technology, secretaries, and administrators.	The size of the group was twelve.
<b>Boleswa</b>	Lecturers attending the symposium.	The size of the group was four.

To cover the topic "secretary versus office manager: a paradigm shift", the researcher planned the following questions for discussion with the three groups.

- What knowledge is required of a secretary/an office manager?
- What skills are required of a secretary/an office manager?
- What values/attitudes are required of a secretary/an office manager?
- Is there still a need in trade and industry to train secretaries/office managers?
- Reasons for a paradigm shift.

To begin the discussion, the researcher used an "ice-breaker" question to help set the mood for the group as a whole. Then a summary on the topic was introduced and the questions handed out to the group in the form of "puzzle pieces" to be built by the group as they discussed the questions and made notes (see Annexure E). This implies, that the researcher watches and listens to their discussion and finally joins in the discussion by summarising all that was said on a flip chart.

The findings of the questions posed to the different focus groups, will be given in table format. Any findings per group that are more or less the same, will be mentioned only once.

**TABLE 33: NINTH BOLESWA INTERNATIONAL EDUCATIONAL RESEARCH SYMPOSIUM**

<b>Secretary versus Office Manager: A paradigm shift</b>	
<b>How do you see a secretary?</b> <ul style="list-style-type: none"> <li>• Does typing</li> <li>• Does general office work</li> <li>• Does general organising</li> </ul>	<b>How do you see an office manager?</b> <ul style="list-style-type: none"> <li>• Has authority</li> <li>• Decision-maker</li> <li>• Communicator</li> <li>• Planner</li> <li>• Organiser</li> </ul>
<b>1. What knowledge is expected of a secretary?</b> <ul style="list-style-type: none"> <li>• Basic computer literacy</li> <li>• Office procedures</li> <li>• Business correspondence</li> </ul>	<b>1. What knowledge is expected of an office manager?</b> <ul style="list-style-type: none"> <li>• Computer literacy</li> <li>• Office procedures</li> <li>• Business correspondence</li> <li>• Organisational structure of company</li> <li>• Basic finance</li> <li>• Aims and objectives of company</li> </ul>
<b>2. What skills are expected of secretaries?</b> <ul style="list-style-type: none"> <li>• Computer competency</li> <li>• Shorthand</li> <li>• Communication/language</li> <li>• Office etiquette</li> <li>• Organising</li> <li>• Planning</li> <li>• Time management</li> <li>• Interpersonal relationships</li> </ul>	<b>2. What skills are expected of an office manager?</b> <ul style="list-style-type: none"> <li>• Computer competency</li> <li>• Multi-skilled</li> <li>• Shorthand</li> <li>• Communication/language</li> <li>• Office etiquette</li> <li>• Organising</li> <li>• Planning</li> <li>• Time management</li> <li>• Interpersonal relationships</li> <li>• Financial management</li> <li>• Resourcefulness</li> </ul>
<b>3. What are the attitudes/values of a secretary?</b> <ul style="list-style-type: none"> <li>• Pride</li> <li>• Professionalism</li> <li>• Good image</li> </ul>	<b>3. What are the attitudes/values of an office manager?</b> <ul style="list-style-type: none"> <li>• Integrity</li> <li>• Trustworthy</li> <li>• Honest</li> <li>• Good-tempered</li> <li>• Work with diverse groups</li> <li>• Punctuality</li> <li>• Loyalty</li> </ul>
<b>4. Does trade and industry still need a secretary?</b> <ul style="list-style-type: none"> <li>• Yes</li> <li>• For the personal touch (cannot do without the person)</li> </ul>	<b>4. Does trade and industry still need an office manager?</b> <ul style="list-style-type: none"> <li>• Yes – more now than ever before</li> <li>• For administration of information</li> <li>• Complexity of office</li> <li>• Multi-skilled</li> <li>• To take the lead</li> </ul>
	<b>5. Why do you prefer the title office manager?</b> <ul style="list-style-type: none"> <li>• Vast technology changes – the management of the office also changed</li> <li>• Recognition of intellect</li> <li>• Move towards resourcefulness</li> </ul>



Secretary versus Office Manager: A paradigm shift	
	<ul style="list-style-type: none"> <li>• Specialised area</li> <li>• Part of management team</li> <li>• Manages the office</li> <li>• What is an office administrator?</li> </ul>

**TABLE 34: ECONOMIC AND MANAGEMENT SCIENCES CONFERENCE**

Secretary versus Office Manager: A paradigm shift	
<b>1. What knowledge is expected of a secretary?</b> <ul style="list-style-type: none"> <li>• Typing (computer competency)</li> <li>• Communication</li> <li>• Tel. Etiquette</li> <li>• How does a computer work (computer literacy)</li> <li>• Documentation</li> <li>• How to keep a diary</li> <li>• How to organise</li> </ul>	<b>1. What knowledge is expected of an office manager?</b> <ul style="list-style-type: none"> <li>• How to manage the office</li> <li>• Policy and procedures of the office/department</li> <li>• Problem-solving</li> <li>• Interpersonal relationships</li> <li>• How to prioritise</li> <li>• Know aims and objectives of company</li> <li>• Communication</li> <li>• Documentation</li> <li>• Computer competency</li> </ul>
<b>2. What skills are expected of a secretary?</b> <ul style="list-style-type: none"> <li>• Technology (computer competency)</li> <li>• Communication</li> <li>• Interpersonal</li> <li>• Time management</li> <li>• Logical thinking</li> <li>• Meeting procedures</li> <li>• Reading &amp; writing</li> </ul>	<b>2. What skills are expected of an office manager?</b> <ul style="list-style-type: none"> <li>• Computer competency</li> <li>• Communication</li> <li>• Managerial skills</li> <li>• Logical thinking</li> <li>• Decision-making</li> <li>• Creative thinking</li> <li>• Interpersonal</li> <li>• Reading, writing, calculating</li> <li>• Conceptualise</li> <li>• Time management</li> <li>• Multi-skilled</li> </ul>
<b>3. What are the attitudes/values of a secretary?</b> <ul style="list-style-type: none"> <li>• Positive, friendly</li> <li>• Responsible</li> <li>• Professional</li> <li>• Ability to change/be adaptable</li> <li>• Dress code</li> <li>• Productive</li> <li>• Good self-esteem</li> <li>• Helpful</li> <li>• Alterable and adaptable</li> </ul>	<b>3. What are the attitudes/values of an office manager?</b> <ul style="list-style-type: none"> <li>• Positive, patient</li> <li>• Good self-esteem</li> <li>• Respect</li> <li>• Ability to change</li> <li>• Trustworthy</li> <li>• Productive</li> <li>• Effective</li> <li>• Loyal</li> </ul>
<b>4. Is there still a need in trade and industry for a secretary?</b> <ul style="list-style-type: none"> <li>• Yes, we cannot all be leaders, we need followers</li> <li>• Somebody in the front line</li> <li>• For the image of the company</li> <li>• It is the first contact person in a company</li> </ul>	<b>4. Is there still a need in trade and industry for an office manager?</b> <ul style="list-style-type: none"> <li>• Yes</li> <li>• To co-ordinate the office</li> <li>• To manage the information</li> </ul>
<b>5. Reasons for a paradigm shift</b> <ul style="list-style-type: none"> <li>• Is efficient</li> <li>• Stimulating – part of management team</li> <li>• Make decisions</li> </ul>	

<b>Secretary versus Office Manager: A paradigm shift</b>	
<ul style="list-style-type: none"> <li>• Manage office</li> <li>• Flexibility</li> <li>• Initiative</li> <li>• Develop with technology – multi-skilled</li> </ul>	

From the discussions of both the above focus groups it is clearly noted, that both groups see a secretary as someone with knowledge, skills, and values/attitudes as mentioned, but ranked in a lower position than an office manager. The office manager manages the information in an office, takes the lead and is part of the management team. As stated, the title "office manager" gives "recognition of the intellect." Some of the reasons given for a paradigm shift from the secretary to the office manager, are.

"Stimulating - part of management team, make decisions, manage the office."

**TABLE 35: LECTURERS FROM CAPE TECHNIKON**

<b>What knowledge is required of an office manager?</b>
<ul style="list-style-type: none"> <li>• Good communication skills</li> <li>• Competency in computers/software skills</li> <li>• Creativity, initiative, strong personality</li> <li>• A good decision-maker</li> <li>• A good problem-solver</li> <li>• Participative management style</li> <li>• Managing persons, equipment, furniture, space</li> <li>• Competent in departmental budgeting</li> <li>• Knowledgeable in business planning</li> <li>• Knowledgeable in financial planning</li> <li>• Competent in improving office productivity</li> <li>• Competent in all management functions</li> <li>• Knowledgeable in various fields: legal principles and human resources</li> <li>• Human relations</li> <li>• Administrative</li> </ul>
<b>What skills are required of an office manager?</b>
<ul style="list-style-type: none"> <li>• Communication</li> <li>• Computer literate</li> <li>• Human relations, labour relations</li> <li>• Etiquette</li> <li>• Financial background to draw up wage/salary sheets</li> <li>• Organisational</li> <li>• Technical skills</li> <li>• Administration skills</li> </ul>
<b>What values/attitudes are required of an office manager?</b>
<ul style="list-style-type: none"> <li>• Considering multi-cultural differences in staff members</li> <li>• Delegate responsibility</li> <li>• Be a good listener</li> <li>• Open-door policy</li> <li>• To think on his/her feet</li> <li>• Be able to solve human, machine and economic problems</li> <li>• Professionalism</li> </ul>

<ul style="list-style-type: none"> <li>• Respect</li> <li>• Confidence</li> <li>• Reliability</li> <li>• Good moral</li> <li>• Communication</li> <li>• Assertiveness</li> <li>• Consistency</li> </ul>
<p><b>Does trade and industry still need office managers?</b></p> <ul style="list-style-type: none"> <li>• Yes, absolutely!</li> <li>• In a corporate environment the workload of functional manager can be relieved by means of a centralised administration department</li> </ul>

The discussions of the focus group from the lecturing staff of the Cape Technikon, focused only on the office manager, as they train only office managers at their technikon. It was agreed, that an office manager manages the office and should be competent in management functions. Trade and industry needs office managers to relieve the workload of the functional manager in a corporate environment.

This concludes the findings in this section on focus groups. The following method to be discussed is the case study.

#### **4.3.6 A case study**

The following background information is given on company XYZ. With the closure of the typing pools in this company, typists were absorbed into secretarial positions. Their basic skill was typing, with no secretarial skills and they entered jobs as typists, tea makers and telephonists. With the advent of affirmative action, the new entrants might have had formal training, but very little experience. This created a situation where secretaries were not adding value to the business and little effort was made to develop their skills.

During 1998 a skills audit was introduced to assess the current secretarial skills within the company. Awareness was created amongst secretaries and managers that the role of secretaries had changed and the need for them to be developed and empowered, was stressed. Another problem was created when the company started to raise the status of current secretaries or to employ personal assistants (PA'S). Personal assistants were employed and remunerated on middle management level but their outputs were that of a secretary. Thus, secretaries and personal assistants were both in secretarial capacities, with the same job description but with a difference in remuneration. This was the rationale for conducting the needs analysis so that the company would have processes and systems in place.

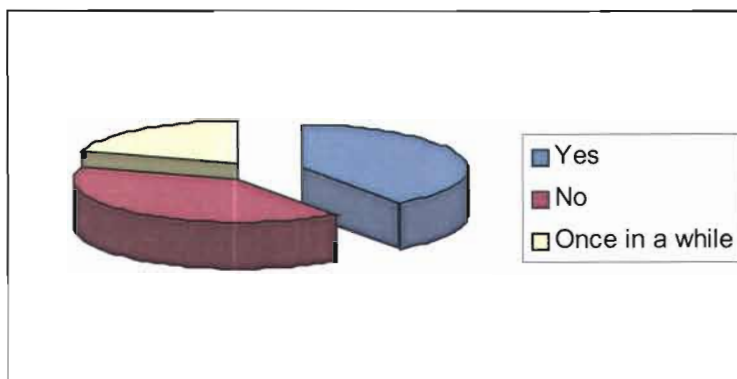
A case study was conducted at company XYZ where questionnaires were sent to 600 secretaries (junior, senior executive secretaries as well as personal assistants). The company made use of the researcher's original questionnaire by using the questions applicable only to their needs. From the total only 60, (10 per cent) responded. The questionnaires were used to conduct a needs analysis at the current company as well as to rectify the current situation. The following questions were asked.

- Has the management of the office changed?
- Why has the administration of information changed?
- What measuring tool does the human resource department use to evaluate job performance?
- What knowledge is required of a secretary/personal assistant?
- Is there still a demand for a formal qualification for an entry-level for a secretary/personal assistant?

The results are discussed as follows.

- **Work environment purposes: Has the management of an office changed?**

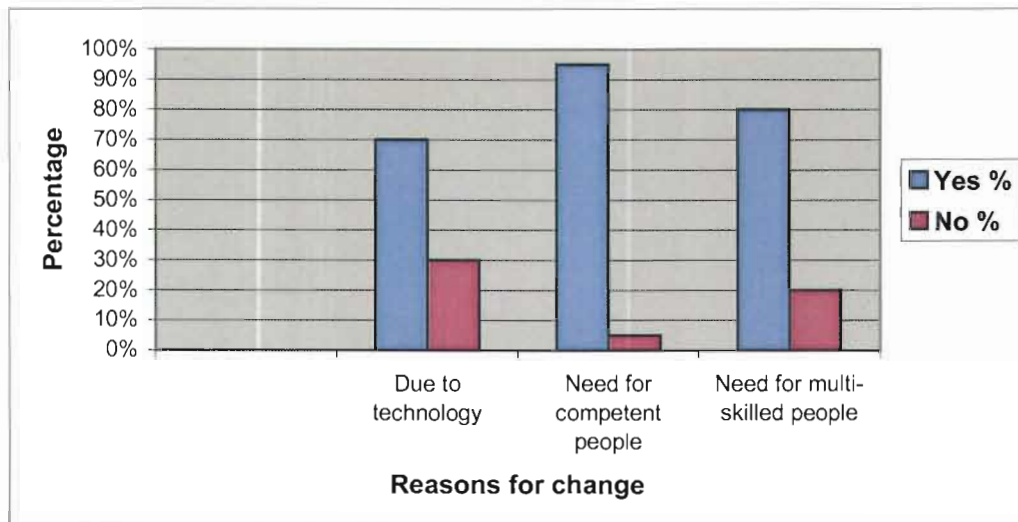
**FIGURE 42: HAS THE MANAGEMENT OF AN OFFICE CHANGED?**



In general, 40 per cent of the "secretaries" felt that the management of an office has changed, 40 per cent felt it has not, while the other 20 per cent feels it changes "once in a while".

- **Work environment and training purposes: Change in the administration of information in an office**

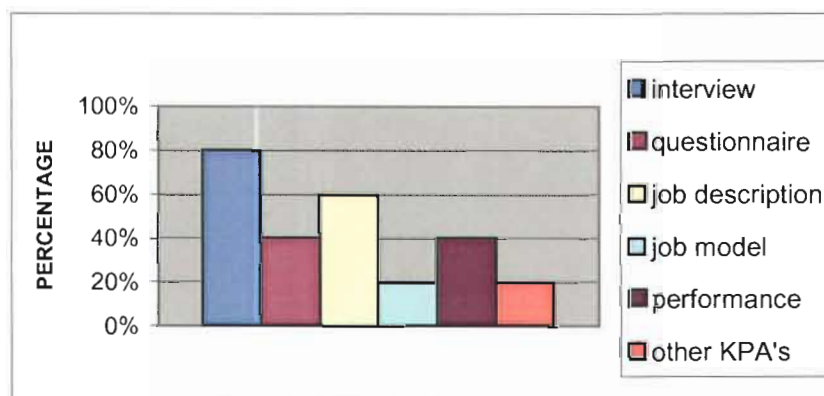
**FIGURE 43: CHANGE IN THE ADMINISTRATION OF INFORMATION IN AN OFFICE**



The majority (95 per cent) of the "secretaries" felt, that the administration of information in an office changed because of a need for competent people. The other two reasons, namely a "need for multi-skilled people" (80 per cent) and "due to technology" (70 per cent) indicates, the importance of a new vision for training.

- **Work environment purposes: Tools used by the human resource department**

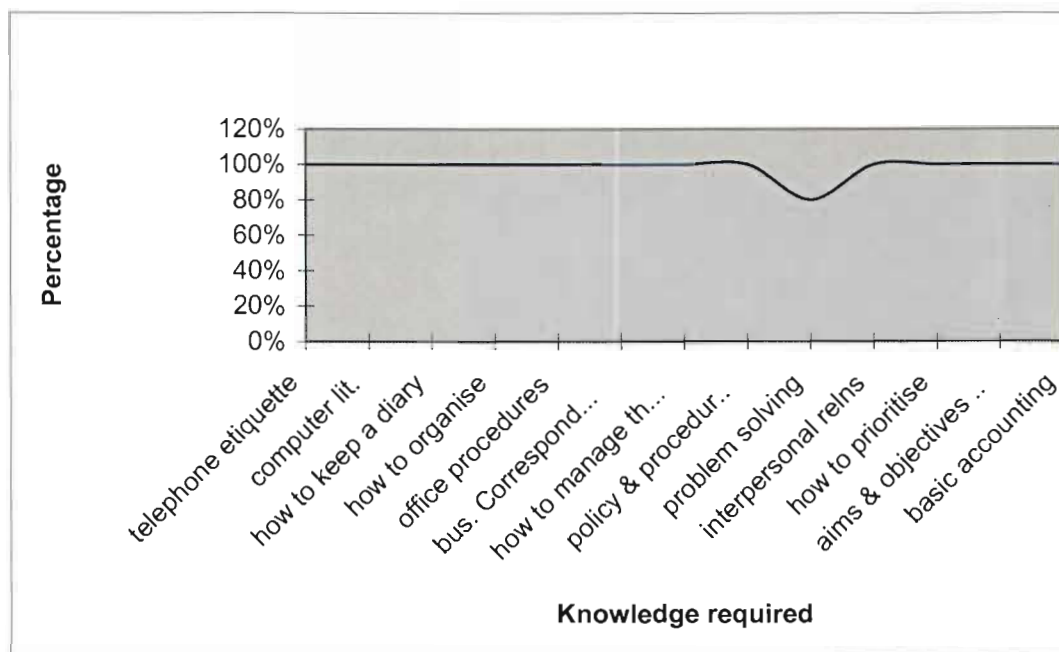
**FIGURE 44: HR TOOLS**



The most frequently used measuring tool for recruitment by the human resource department, is interviews (80 per cent) with 60 per cent being the job description. Other tools used in training, are questionnaires, performances, job models, and key performance areas (KPA's).

- **Performance purposes: What knowledge is required of a secretary/PA?**

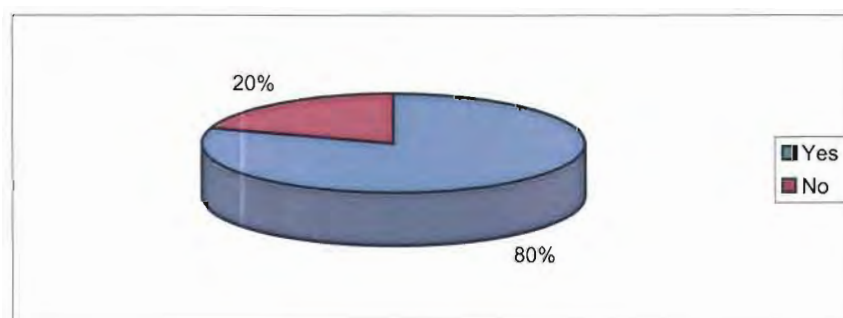
**FIGURE 45: KNOWLEDGE REQUIRED OF A SECRETARY/PA**



Most "secretaries" (80 per cent) felt, that knowledge of all the above listed was important, except for 20 per cent, who felt that problem-solving was not important.

- **Work environment purposes: Is there a demand for a formal qualification for an entry level secretary/PA?**

**FIGURE 46: DEMAND FOR A FORMAL QUALIFICATION**



Most "secretaries" (80 per cent) felt it crucial to have a formal qualification for an entry level secretary/PA. The other (20 per cent) felt it was not necessary.

The above survey done in company XYZ, indicated that the management in an office has changed, mainly due to technology and that the tool used most by the human resource department, is questionnaires. The majority indicated the importance of a formal qualification for an entry level PA.

#### 4.4 SUMMARY

In this chapter the implementation and results were represented according to the multivariate statistical design that included both quantitative and qualitative research methods. The research methods included questionnaires, interviews, observations, focus groups and a case study.

The following main results will be highlighted. The majority of Technikons in South Africa feel, that they train office managers and not secretaries as a result of the standard of the training done at Technikons. It was also felt that office managers need formal training and that Technikons need to develop the curriculum for information administration for them to be able to comply with the needs in commerce and industry.

From commerce and industry's point of view, the management of an office changes continuously, mainly due to the constant technological changes and changes in roles and expectations, as well as the additional empowerment needed to manage the office. As a result of the technological changes in an office, the administration of information in an office has also changed. The need for multi-skilled office managers is a high priority in commerce and industry. Therefore, training is now more essential than ever before.

The main problem areas encountered during an interview with potential employees, were communication skills, language problems, and the absence of training for an interview situation. A CV cannot give a true reflection of how a person will perform in the workplace and potential employees have problems when writing a CV.

Another highlight, is the positive perception from commerce and industry on the use of portfolios during an interview, which will assist in evaluating potential entry-level employees. It was motivated, that a portfolio gives a true reflection of competencies, skills, knowledge and abilities of a person.

During experiential training, the quality of the work done, time management, adaptability, the making of decisions, professional conduct, and learning by experience and implementing new skills, are of the main areas to judge job performance by.

Technikons in South Africa, as well as commerce and industry, contributed to an assessment of what knowledge, skills, values/attitudes are required of an office manager (Tables 20 - 25).

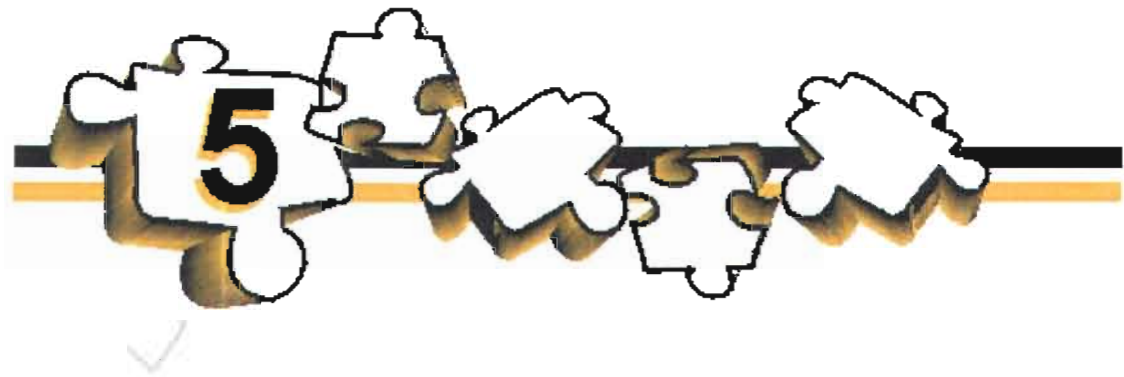
The titles office manager, secretary, and personal assistant were defined (Tables 24, 25, and 26). It was felt that an office manager is a leader and decision-maker who manages the office and meets all the requirements (§4.2.2.3) of the knowledge, skills, values/attitudes.

The requirements for a training programme, are listed in Table 27. It was suggested, that the knowledge, skills, values/attitudes listed in the questionnaire in Section C, be part of the basic training programme. From the findings of the interviews, it was recommended, that training should focus on holistic skills based business context.

The case study on company XYZ also confirmed, that the management of an office changed, mainly due to technology and that a formal qualification for a secretary/PA is crucial. It was also confirmed, that the listed knowledge required for a secretary/PA, is essential.

The next chapter will focus on recommendations for the contribution to curriculum development of information administration as well as a profile for office managers according to the needs of commerce and industry. It will also indicate whether there will be a paradigm shift from secretary to office manager in terms of status.





## CONCLUSIONS AND RECOMMENDATIONS

### 5.1 INTRODUCTION

This chapter will reflect on the main findings of the results of the previous chapters, thus concluding the AR cycle (Figure 3) used as the main research method for this study. The other cycles of planning (Chapters 1, 2), acting (Chapter 3), and observing (chapter 4), have been dealt with, as indicated by figure 5. The results will be interpreted by indicating connections with the theoretical discussions from the literature study with the findings of the investigation. Recommendations regarding a vision for a curriculum for office managers, as well as a profile for the training of office managers, will be made. During the study certain problems were identified. Limitations of the study will be highlighted and recommendations will be made concerning possible further research.

In this section a short summary of the most important information from the literature study and the findings will be presented. An overview of the research question based on the following objectives as indicated in chapter 1 is subsequently presented.

- To investigate the knowledge, skills, values/attitudes for a competent office manager in higher education, and to prove the appropriateness and relevance of this type of education.
- To contribute to the development of an understanding of the skills and competencies that have to be developed within office management education, including curriculum development based on the needs of commerce and industry.

- To provide a profile for office managers and to develop a model for the training of office managers through the use of A/L.
- To determine whether there will be a paradigm shift from secretary to office manager in terms of status.

Based on the research question: secretary versus office manager: a paradigm shift, it was necessary to explore the theoretical as well as the practical field of an office manager (Chapter 2, 3). In a changing South Africa the emphasis is on the training, educating and development of its people.

Chapter 2 dealt with the background on the profile, training, and title of the office manager, as well as the influence of changes that affected the secretarial profession, more specifically the training of office managers. These changes include office environment, technology and Higher Education.

A breakthrough with the first edition of a Blueprint for the secretarial profession came to light in 1995 and the second edition in 2001 (§2.2.1). The Blueprint will be responsible for recording advances and giving direction in this profession. An overview of the training of office managers and the origin of the subject information administration at the Vaal Triangle Technikon, were given (§2.3.1). Certain problems have been identified through observation from the researcher and the use of AL (§2.3.2). A background is given on the discourse of the title of secretary (§2.4). The name "secretary" is used, but the job description or profile indicates that he/she manages the office. The problem area in this profession lies in the use of combined titles, as this is not the case in other professions.

In chapter 3 (§3.5.1, 3.5.2) a discussion of the multivariate statistical design used for both quantitative and qualitative methods for this study, was given. An objective for this study, was to determine the needs for office managers in commerce and industry as well as curriculum development within office management education at Technikons (§1.2.2). Therefore, a structured open-ended and closed questionnaire was designed to focus on commerce and industry and Technikons. The other methods utilised, were focus groups, interviews, observation and the case study (Figure 15).

The results of the findings of both quantitative and qualitative methods are described in chapter 4. At the Vaal Triangle Technikon, Department of Office and Sport Management, the learners are trained to become office managers; thus the findings will

concentrate on the title "office manager". Some Technikons could have misinterpreted the question regarding the training of secretaries or office managers, as the feedback was very low. This can be related to the many titles of secretary, actually meaning the same thing.

## 5.2 CONCLUSIONS

A conclusion i.r.o. the findings from chapter IV follows.

### 5.2.1 Profile for an office manager

Technikons in South Africa, commerce and industry, as well as employees in the work environment, made the following important contribution on what knowledge, skills, values/attitudes are required of an office manager. A summary from the investigation made, is given in Tables 35, 36, and 37.

**TABLE 36: KNOWLEDGE REQUIRED OF AN OFFICE MANAGER**

Knowledge : office manager	
Aims & objectives of co.	How to prioritise
Appraisal performance	IT system knowledge
Access information	Language
Basic administrative knowledge	Minutes taking
Basic Accounting	Meeting procedures
Business acumen	Office procedures
Business etiquette	Project management
Communication	Policy & procedures of co.
Computer literacy	Psychology
Corporate culture	Professionalism
Customer service	Psychology
Documentation	Research methodology
How to keep a diary	Self-motivation
How to organise	Supervising
How to manage the office	Telephone etiquette

**TABLE 37: SKILLS REQUIRED OF AN OFFICE MANAGER**

Skills : office manager	
Accounting	Logical thinking
Business writing	Listening
Calculating	Managerial skills
Communication skills (also written)	Motivation
Creativity	Problem-solving
Conflict management	Presentation skills
Computer competency	Proofreading
Customer relations	Resourcefulness
Desktop publishing	Stress management
Decision-making	Shorthand/speed writing
Dictaphone	Time management
E-mail	Teaching
Human relations	Working pressure
Internet	Working with teams

**TABLE 38: VALUES/ATTITUDES REQUIRED OF AN OFFICE MANAGER**

<b>Values/attitudes : office manager</b>	
Accountability	Loyalty
Assertiveness	Openness for opinions
Confidentiality	Positive attitude
Compassion	Professionalism
Emotional stability	Productivity
Efficiency	Punctuality
Empathy	Responsibility
Good self-esteem	Respect
Flexibility	Self-accountability
Helpfulness	Trustworthy
Honesty	Tact
Integrity	Team contribution
Independence	Willingness to learn

### **5.2.2 Need for training**

According to Technikons in South Africa, there is a definite need to train office managers for a formal qualification in office management and technology resulting from the changes in technology, office environment, the administration of information in an office and the changes in Higher Education (§2.5.3).

It was confirmed by commerce and industry that the management of an office has changed as a result of a change in technology (§4.2.2.2). Thus the administration of information in the office changed due to the change in technology and the need for multi-skilled people (§4.2.2.2). To comply in these needs, it is recommended that office managers have a formal qualification. Training and life-long learning is essential for an empowering management, in other words, the relevance and necessity of this type of education has been proved.

### **5.2.3 Curriculum development**

Lecturing staff at Technikons made it clear, that there is a need for curriculum development in office management and technology in collaboration with commerce and industry. The following table includes the recommendations made from commerce and industry, as well as the employees in the work environment, for a curriculum for the training of office managers (§4.2.1.14, 4.3.2.7, 4.3.3.4).

**TABLE 39: REQUIREMENTS FOR A CURRICULUM**

Requirements for a curriculum	
Accounting	Office management
Business management	Presentation skills
Business etiquette	Public relations
Business documents	Role play situations (e.g. interviews)
Computer competency	Skills (§4.2.2.3)
Computer literacy	Speed writing
English HG	Typing (pre-requisite)
Function/event management	Typing speed
Hands-on/practical experience	Values/attitudes (§4.2.2.3)
Holistic skills based business context	Verbal communication
Knowledge (§4.2.2.3)	Written communication
Life skills	

### 5.2.4 Definition of an office manager

Commerce and industry and participants in the work environment defined the title of an office manager.

An office manager is a competent professional leader who manages the office efficiently by making decisions, co-ordinating all administrative functions, and delegating tasks from management. An office manager is computer literate and competent, multi-skilled, and meets all the requirements (§4.2.2.3) of the knowledge, skills, and values/attitudes.

### 5.2.5 Portfolio development

The respondents indicated, that they do have difficulty when interviewing potential entry-level employees as the employees cannot communicate their capabilities or skills. The main reasons given for this problem, were lack of interview training, a language problem, lack of self-confidence, and no evaluation on practical application (§4.3.2.8).

Another difference was between the CV and the interview with the employee. It was reported, that a CV is not a true reflection of the person and that there is no proof of practical performance (§4.3.2.9). Therefore, a portfolio is recommended to assist in appointing employees, considering the following factors: to incorporate a wide range of skills, to be a true representation, to limit the volume due to time constraints, and to update skills regularly (§4.3.2.11). The reasons given why a portfolio will assist in the appointing of employees, are as follows (§4.3.2.10).

- It gives additional information of the person and leads to a better perception of the candidate.
- It combines theory and practical experience.
- It gives a true reflection of competencies, skills, knowledge and abilities.

## **5.3 RECOMMENDATIONS**

### **5.3.1 Profile**

A new profile for an office manager is outlined, according to the findings and the results of findings in chapter 4. The profile indicates what knowledge, skills, and values/attitudes are required of an office manager (Table 36 - 38).

This profile contains the knowledge, skills, and values/attitudes, which are needed in commerce and industry for a competent office manager and that training should definitely be directed towards these outcomes. Technikons in South Africa, commerce and industry, as well as employees in the work environment (chapter 4), have identified the profile.

The new profile will contribute to the cognitive development (knowledge), managerial development (skills), and behavioural development (values/attitudes) of an office manager.

### **5.3.2 Training**

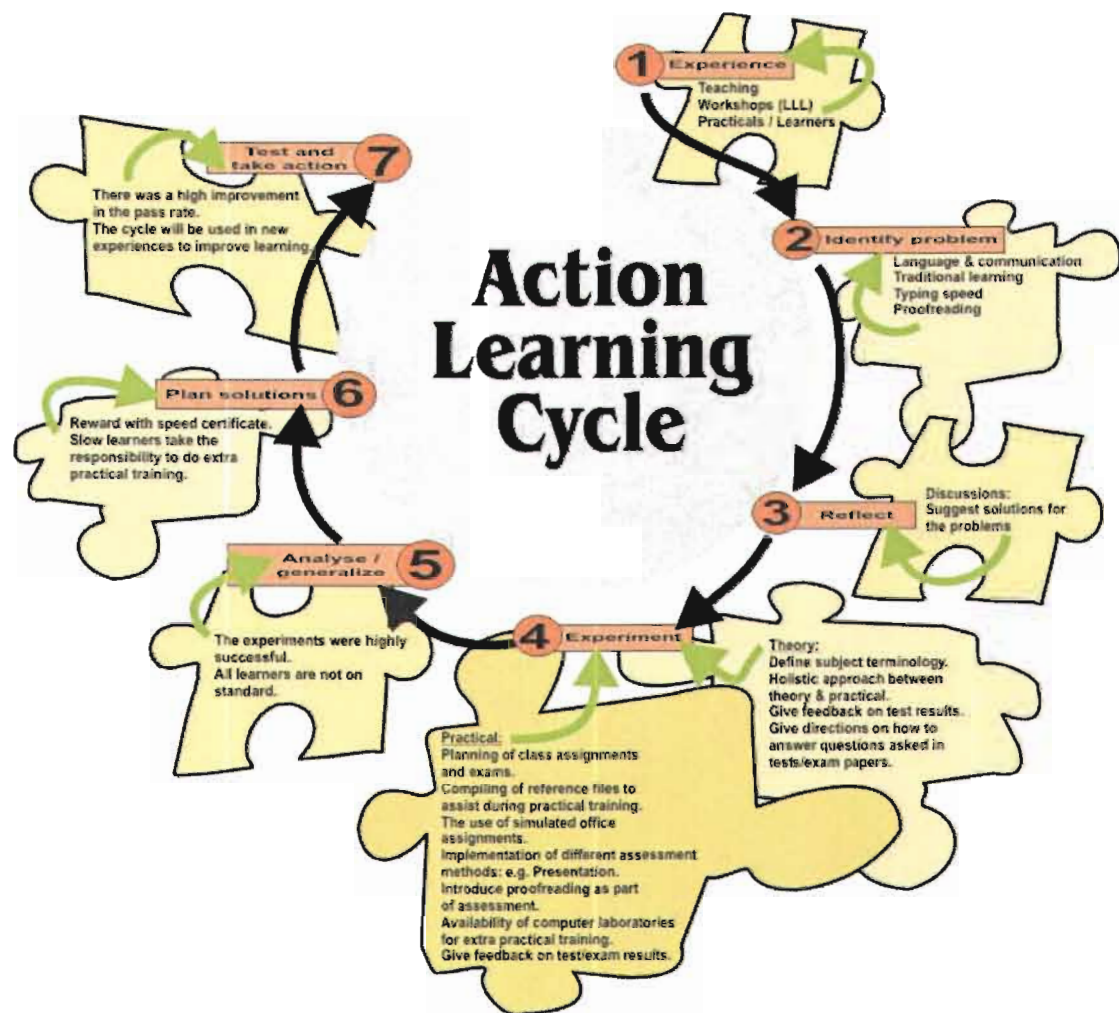
In South Africa companies have to change in order to survive, as they have to compete with the new globalised world. Thus change in training at the VTT is crucial towards meeting the needs of commerce and industry and to improve education in South Africa, as defined in the New Plan for Higher Education. To improve the skills of a work force, will also contribute to the economy of South Africa and in this case, particularly to the training of office managers.

The continued change in the management of an office as a result of the increasing change in technology, most certainly affected the management of administration in an office. The need for training is confirmed by the demand for a formal qualification in office management.

Training should include computer literacy and competency, in other words, acquiring the knowledge and skills. Skills-based exercises, should include proofreading, business writing, travel arrangements, numeric reasoning, organisational skills, and diary management.

The AL cycle was implemented for the subject information administration towards improving learning and teaching.

**FIGURE 47: IMPLEMENTING AL CYCLE FOR ADMINISTRATION OF INFORMATION**  
(ADAPTED FROM MARQUARDT 1999:36). GRAPHICS: D. WILSON



As indicated in chapter 4 (Figure 41), the learning situation was observed through the entire AL cycle. After completion of the first cycle, the process starts again.

From the researcher's experience as facilitator, attending workshops to improve learning and the practical experience from the learners themselves, the following was found.

The problems identified, were language, communication, traditional learning, typing speed and proofreading. Discussions on solutions for the problems were held. The experiment with the theory module, includes defining subject terminology, interaction between theory and practical, feedback on test results and guidance on how to answer questions in tests and examinations. The experiment with the practical module, includes planning of class assignments and examinations, the compiling of reference files, the use of simulated office assignments, the implementation of different assessment methods, more time for extra practice and feedback on examination results. These experiments proved to be highly successful and it was discovered, that learners were not all on standard. Successful learners were rewarded with a speed certificate and the slow learners had to spend more time practising. This AL cycle improved learning and the outcome showed a marked improvement in the pass rate.

### **5.3.3 Title**

The background relating to the dispute of the title "secretary versus office manager" was discussed in chapter 2. The indications of change exist in all aspects of the profile, training and the title of the office manager. Reasons that were given from respondents for a paradigm shift from secretary to office manager were the following. An office manager manages the office, is multi-skilled and develops alongside technology, and is part of the management team. The title "office manager" will give recognition to the presence of intellect.

As a result of the diversity in organisations using different titles, no shift from secretary to office manager in terms of status can be confirmed.

### **5.3.3 Curriculum development**

Commerce and industry, as well as technikons in South Africa (§5.2.3), highlighted a training programme for office managers at the Vaal Triangle Technikon. The needs analyses (knowledge, skills, values/attitudes) in this study, established for the requirements of competent office managers, need to be reviewed, developed and implemented for the curriculum of office management education.



Instead of focussing on secretarial training, it is recommended to concentrate on information management for the training of office managers for the office of the 21<sup>st</sup> millennium. As a contribution to the curriculum development, the following framework for a curriculum is recommended.

### **Theoretical**

- Accounting
- Business management
- Business etiquette
- Customer service
- Communication
- Computer literacy: the knowledge of computers
- English
- Function and events management
- Life skills
- Office management
- Public relations
- Project management

### **Practical**

- Computer competency. Word processing, spreadsheets, data base, presentations, desktop publishing, e-mail, internet, intranet
- File management
- Presentation skills: compile, present
- Documentation: letters, memoranda, newsletters, agendas, minutes, reports, annual reports, pamphlets, booklets, forms, CV's
- Typing speed
- Speedwriting
- Portfolios
- Proofreading

## **5.4 RECOMMENDATIONS FOR FURTHER RESEARCH**

Based on the findings of this investigation, the following issues can be considered for further research.

- An investigation of project management as a career path for the office manager, including the requirements in the curriculum of the training of office managers.
- This study investigated the requirements needed in commerce and industry, so as to contribute to curriculum development in office management education. A project on the development of a fully comprehensive curriculum for office managers at technikons, should be undertaken.

## 5.5 LIMITATIONS OF THE STUDY

It has already been mentioned, that this study concentrated specifically on the development of skills and competencies within office management education, based on the needs of commerce and industry. The study also included a contribution to curriculum development, but excluded the development of a fully comprehensive curriculum for office management education.

## 5.6 SUMMARY

Findings

This study had relevance and added value to the contribution of education and training in the field of office management and technology, more specifically the training of office managers. The research methodology of AR made it possible to identify and analyse problems, as well as to design strategies for solving the problem by implementing and testing. The specific successful contributions from this study are the following.

- A valuable contribution has been made towards creating a new profile for office managers as based on the needs of commerce and industry.
- The development of a model for the training of office managers through the use of AL.
- The demand in commerce and industry for competent office managers, proves the relevance for this type of education.
- Definite requirements from trade and industry for the development of a curriculum for office management and technology.

The Minister of Education in October, announced that the VTT would be known as the Vaal University of Technology as from the year 2004, but this study was conducted in the technikon environment.

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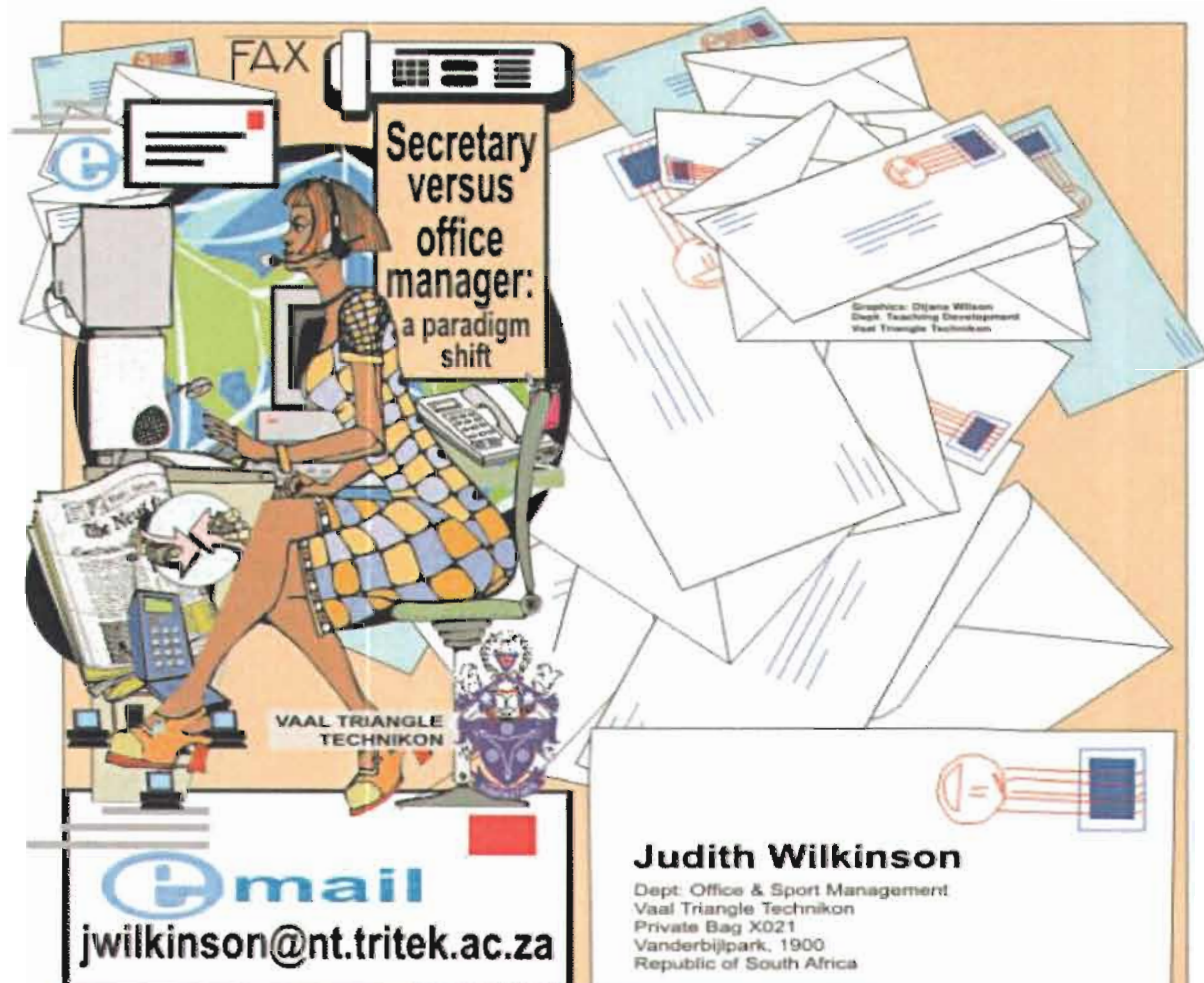
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## COVER LETTER



**Secretary versus office manager: a paradigm shift**

VAAL TRIANGLE TECHNIKON

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**Judith Wilkinson**  
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Vaal Triangle Technikon  
Private Bag X021  
Vanderbijlpark, 1900  
Republic of South Africa

15 November 2001

Dear Colleague

**COMPLETION OF QUESTIONNAIRE**

I am a senior lecturer at the Vaal Triangle Technikon. Currently I am studying towards my MTech: Office Management and the topic of my thesis is: Secretary versus office manager: a paradigm shift.

I would appreciate your help in completing a short questionnaire. The aim of this questionnaire, is to gather information about perceptions regarding the training, education and development of secretaries and/or office managers. The results of the survey will be shared with all respondents.

**YOUR VIEWS ARE VERY IMPORTANT TO ME!**

My contact information is as follows:

Fax: (016) 950 9189

Regards

JUDITH WILKINSON

## ANNEXURE B

### Questionnaire on training, educating and developing competent office managers

Please answer the following questions with an X:

1.	Do you offer a programme in office management and technology?	Yes <input type="checkbox"/>	No <input type="checkbox"/>
2.	Do you train, educate and develop secretaries?	Yes <input type="checkbox"/>	No <input type="checkbox"/>
3.	Indicate the number of secretaries you train, educate and develop (if applicable).	<input type="text"/>	
4.	Do you train, educate and develop office managers?	Yes <input type="checkbox"/>	No <input type="checkbox"/>
5.	Indicate the number of office managers you train, educate and develop (if applicable).	<input type="text"/>	
6.	Do you teach Information Administration?	Yes <input type="checkbox"/>	No <input type="checkbox"/>
7.	<b>What knowledge is required of a secretary?</b>		
	<ul style="list-style-type: none"> <li>Tel. etiquette <input type="checkbox"/></li> <li>Computer literacy <input type="checkbox"/></li> <li>How to keep a diary <input type="checkbox"/></li> </ul>	<ul style="list-style-type: none"> <li>How to organise <input type="checkbox"/></li> <li>Office procedures <input type="checkbox"/></li> <li>Business correspondence <input type="checkbox"/></li> </ul>	
	Other: .....	.....	
8.	<b>What knowledge is required of an office manager?</b>		
	<ul style="list-style-type: none"> <li>How to manage the office <input type="checkbox"/></li> <li>Policy and procedures of the co. <input type="checkbox"/></li> <li>Problem-solving <input type="checkbox"/></li> <li>Interpersonal relationships <input type="checkbox"/></li> <li>Computer literacy <input type="checkbox"/></li> </ul>	<ul style="list-style-type: none"> <li>How to prioritise <input type="checkbox"/></li> <li>Aims and objectives of co. <input type="checkbox"/></li> <li>Business correspondence <input type="checkbox"/></li> <li>Basic accounting <input type="checkbox"/></li> </ul>	
	Other: .....	.....	
9.	<b>What skills are required of a secretary?</b>		
	<ul style="list-style-type: none"> <li>Computer competency <input type="checkbox"/></li> <li>Communication <input type="checkbox"/></li> <li>Interpersonal relationships <input type="checkbox"/></li> <li>Time management <input type="checkbox"/></li> </ul>	<ul style="list-style-type: none"> <li>Logical thinking <input type="checkbox"/></li> <li>Meeting procedures <input type="checkbox"/></li> <li>Reading &amp; writing <input type="checkbox"/></li> <li>Shorthand <input type="checkbox"/></li> </ul>	
	Other: .....	.....	
10.	<b>What skills are required of an office manager?</b>		
	<ul style="list-style-type: none"> <li>Computer competency <input type="checkbox"/></li> <li>Communication <input type="checkbox"/></li> <li>Managerial skills <input type="checkbox"/></li> <li>Logical thinking <input type="checkbox"/></li> <li>Decision-making, creative thinking <input type="checkbox"/></li> <li>Interpersonal relationships <input type="checkbox"/></li> <li>Reading, writing, calculating <input type="checkbox"/></li> </ul>	<ul style="list-style-type: none"> <li>Conceptualise <input type="checkbox"/></li> <li>Time management <input type="checkbox"/></li> <li>Multi-skilled <input type="checkbox"/></li> <li>Shorthand <input type="checkbox"/></li> <li>Accounting <input type="checkbox"/></li> <li>Resourcefulness <input type="checkbox"/></li> </ul>	
	Other: .....	.....	

<b>11. What values/attitudes are required of a secretary?</b> <ul style="list-style-type: none"> <li>• Responsible <input style="float: right;" type="checkbox"/></li> <li>• Professional <input style="float: right;" type="checkbox"/></li> <li>• Positive <input style="float: right;" type="checkbox"/></li> <li>• Alterable and adaptable <input style="float: right;" type="checkbox"/></li> </ul> <p>Other: .....</p>	<ul style="list-style-type: none"> <li>• Pride <input style="float: right;" type="checkbox"/></li> <li>• Productive <input style="float: right;" type="checkbox"/></li> <li>• Good self-esteem <input style="float: right;" type="checkbox"/></li> <li>• Helpful <input style="float: right;" type="checkbox"/></li> </ul> <p>.....</p>
<b>12. What values/attitudes are required of an office manager?</b> <ul style="list-style-type: none"> <li>• Integrity</li> <li>• Trustworthy</li> <li>• Honesty</li> <li>• Good tempered</li> <li>• Punctuality</li> </ul> <p>Other: .....</p>	<ul style="list-style-type: none"> <li>• Loyalty</li> <li>• Respect</li> <li>• Alterable and adaptable</li> <li>• Productive</li> <li>• Efficient</li> </ul> <p>.....</p>

<b>13. Is there still a need to train secretaries?</b> Please motivate: ..... ..... .....	<b>Yes</b> <input type="checkbox"/>	<b>No</b> <input type="checkbox"/>
<b>14. Is there still a need to train office managers?</b> Please motivate: ..... ..... .....	<b>Yes</b> <input type="checkbox"/>	<b>No</b> <input type="checkbox"/>

**15. What is your vision of a curriculum for training office managers?**  
 .....  
 .....  
 .....

**16. Please provide your contact details for reference purposes:**  

Name and Surname: .....	Technikon: .....
	Other: .....
E-mail: .....	

**17. Please provide your contact details for reference purposes:**  

Name and Surname: .....	Technikon: .....
	Other: .....
E-mail: .....	



## ANNEXURE C

### COVER LETTER



November 2001

#### COMPLETION OF QUESTIONNAIRE

I am a senior lecturer at the Vaal Triangle Technikon. Currently I am studying towards my MTech: Office Management and the topic of my thesis is: Secretary versus office manager: a paradigm shift.

I would appreciate your help in completing the following questionnaire. The aim of this questionnaire, is to gather information about perceptions regarding the training, education and development of secretaries and/or office managers. All information will be treated with confidentiality and is for research purposes only.

#### YOUR VIEWS ARE VERY IMPORTANT TO ME!

My contact information is as follows:

Fax: (016) 950 9189

Regards

JUDITH WILKINSON

## ANNEXURE D

# QUESTIONNAIRE ON TRAINING, EDUCATING AND DEVELOPING COMPETENT OFFICE MANAGERS

**Instructions:** Please answer the following questions by marking the appropriate answer(s) with an X and by providing relevant information, where required.

### SECTION A: Position Profile

1.	Are any of the following employed at your company? (If yes, please specify the number)				
1.1	Secretaries (Sec)				
1.2	Office Managers (O/M)				
1.3	Personal Assistants (PA)				
1.4	Other, name				
2.	What are the requirements for the above mentioned position?	Se c	O/M	PA	Other
2.1	Senior Certificate				
2.2	Diploma				
2.3	Degree				
2.4	Experience				

### SECTION B: Work Environment

1.	Has the management of an office changed? (If yes, please fill in the following)			Yes	No
1.1	When did it change?				
1.2	Due to Technology	Yes	No		
1.3	Due to affirmative action	Yes	No		
1.4	Due to shortage of staff	Yes	No		
1.5	Lack of technology	Yes	No		
1.6	Lack of staff with appropriate skills	Yes	No		
1.7	Any other reason				
2.	Has the administration of information in an office changed? (If yes, please fill in the following)			Yes	No
2.1	When did it change				
2.2	Due to technology	Yes	No		
2.3	Need for competent people	Yes	No		
2.4	Need for multi-skilled people	Yes	No		
2.5	Any other reason				
3.	Indicate the measuring tool used by the Human Resource Department to evaluate job performance.				
3.1	Interview				
3.2	Questionnaire				
3.3	Job description				
3.4	Job model				
3.5	Performance				
3.6	Other				

### SECTION C: Work Profile

1.	What knowledge is required of an office manager/secretary/personal assistant?	
1.1	Telephone etiquette	(Tick all you think is appropriate)
1.2	Computer literacy	
1.3	How to keep a diary	
1.4	How to organise	
1.5	Office procedures	
1.6	Business correspondence	
1.7	How to manage the office	
1.8	Policy and procedures of the company	
1.9	Problem-solving	
1.10	Interpersonal relationships	
1.11	How to prioritise	

1.12	Aims and objectives of company	
1.13	Basic accounting	
1.14	Other (Please specify)	

<b>2. What skills are required of an office manager/secretary/personal assistant?</b>			
2.1	Computer competency	(Tick all you think is appropriate)	
2.2	Communication		
2.3	Interpersonal relationships		
2.4	Time management		
2.5	Logical thinking		
2.6	Meeting procedures		
2.7	Reading, writing		
2.8	Shorthand		
2.9	Managerial skills		
2.10	Decision-making		
2.11	Creative thinking		
2.12	Calculating		
2.13	Conceptualising		
2.14	Accounting		
2.15	Resourcefulness		
2.16	Other (Please specify)		
<b>3. What values/attitudes are required of an office manager/secretary/personal assistant?</b>			
3.1	Responsibility	(Tick all you think is appropriate)	
3.2	Professionalism		
3.3	Positivity		
3.4	Alterability and adaptability		
3.5	Pride		
3.6	Productivity		
3.7	Good self-esteem		
3.8	Helpfulness		
3.9	Integrity		
3.10	Trustworthiness		
3.11	Honesty		
3.12	Good temperament		
3.13	Punctuality		
3.14	Loyalty		
3.15	Respect		
3.16	Efficiency		
3.17	Other (Please specify)		
4.	Is there still a demand for a formal qualification for an entry-level for an office manager/ secretary/personal assistant?	Yes	No
5.	<b>What is your definition of an office manager?</b>		
6.	<b>What is your definition of a secretary? (If different from question 5)</b>		
7.	<b>What is your definition of a personal assistant? (If different from question 5 or 6)</b>		
8.	Are you aware that the Vaal Triangle Technikon is training learners to become office managers?	Yes	No
9.	<b>What would your requirements for a training programme be?</b>		

**SECTION D: PORTFOLIO DEVELOPMENT**

*In general, a portfolio is a container (folio) such as a hinged cover or flexible case for carrying (port) loose papers, pictures, pamphlets and a variety of other modes demonstrating different ideas. However, the purpose for collecting these examples is to record purposefully and systematically over time a cohesive presentation of one's work.*

*Portfolios can give first-hand information of the person's knowledge and skills. It is a dialogue between the learner and industry.*

*The Department Office and Sport Management at the Vaal Triangle Technikon implemented the compilation of learner portfolios to improve the marketability of the learner.*

1.	Do you find that the potential entry-level employees have difficulty conveying their capabilities/ skills during an interview? (Motivate your answer)	Yes	No
2.	Is there a difference between the perception you have of a potential entry-level employee when reading his/her CV and/or interviewing the person and that same person's performance in the workplace? (Motivate your answer)	Yes	No
3.	Will a portfolio assist you in appointing potential entry-level employees? (Motivate your answer)	Yes	No
4.	Please rank the following according to importance during an interview? (1=highest, 8=lowest) <i>See the Example</i>		
4.1	Driver's licence	8	
4.2	Communication skills	4	
4.3	Language skills	6	
4.4	Presentation skills	5	
4.5	Practical experience	3	
4.6	Theoretical knowledge of computers	7	
4.7	Results from tertiary institution	2	
4.8	Application of various programmes in Microsoft Windows	1	
5.	Any other comments regarding the concept of portfolios?		

**SECTION E: PRACTICAL TRAINING**

*The Diploma Office Management and Technology has an experiential training component that is compulsory and forms part of the subjects which must be passed in order to obtain the diploma. A logbook is given to each learner for record keeping and an evaluation report must be completed by each employer.*

1.	Which of the following areas are important for evaluation?	
A	<b>PERSONAL PERFORMANCE</b>	(Tick all you think are appropriate)
1.1	Punctuality	
1.2	Loyalty and initiative	
1.3	Appearance and neatness	
1.4	Human relations and friendliness	
1.5	Co-operation	
1.6	Attitude and behaviour	
1.7	Interests	
1.8	Other (Please specify)	



<b>B JOB PERFORMANCE</b>		(Tick all you think are appropriate)			
1.9	Time management				
1.10	Induction				
1.11	Telephone, fax handling				
1.12	E-mail procedures				
1.13	Filing				
1.14	General office work				
1.15	Keeping of minutes and agendas				
1.16	Audio typing work				
1.17	Use of software for document compilation				
1.18	Check of stationary, stock				
1.19	Organising of functions				
1.20	Adaptability				
1.21	Work capacity				
1.22	Work quality				
1.23	Enthusiasm				
1.24	Other (Please specify)				

#### **SECTION E: BIOGRAPHICAL DATA**

What is the position you are currently holding?				
Indicate the number of years of experience you have at the current company	0-2	2-4	4-6	6+
Name and Surname (Optional):				
Name of organisation you are currently employed at:				
Address:				
Tel no: (Optional)		E-mail: (Optional)		

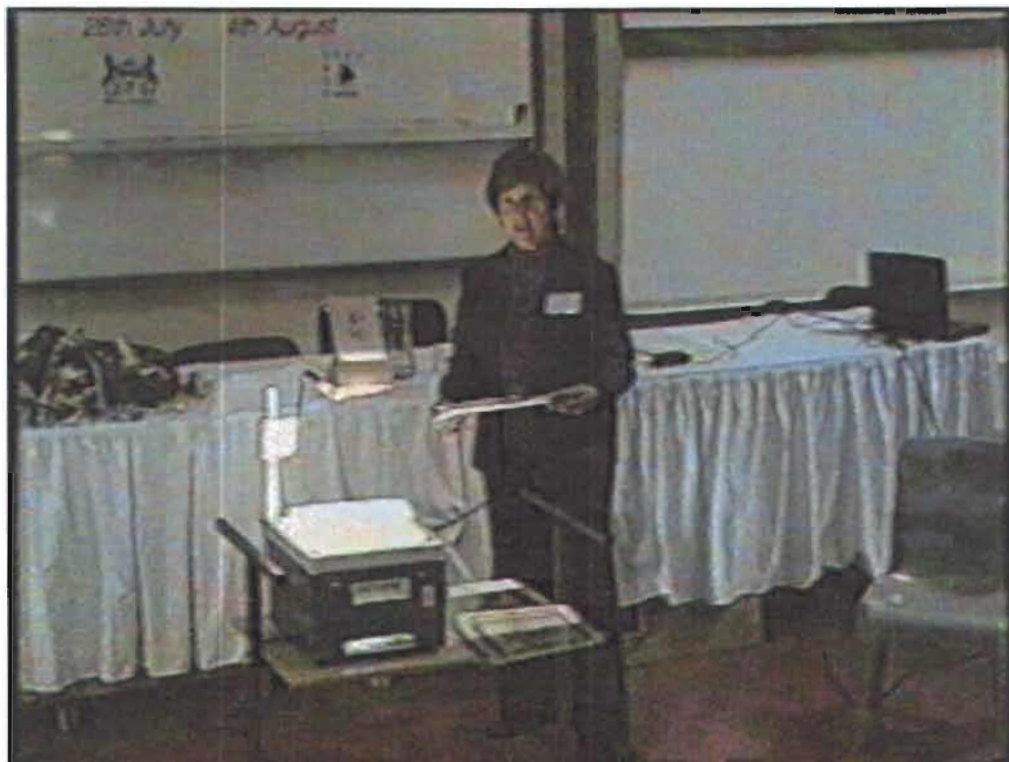
## ANNEXURE E

### FOCUS GROUPS: ECONOMIC & MANAGEMENT SCIENCES CONFERENCE 2001



## ANNEXURE F

### FOCUS GROUP: BOLESWA 2001 RESEARCH SYMPOSIUM



# ANNEXURE G

## NQF: DISCUSSION DOCUMENT

### A Qualifications Framework for Higher Education

NQF Levels	HE Sub-levels	(Cumulative-minimum totals) & minimum credits per qualification	General Vertical articulation		Articulation Horizontal & diagonal articulation	Career-focused Vertical articulation	
8	PG 4	(1020) 360	Doctor of Philosophy (360 @ PG4)			Doctor of Philosophy, Professional Doctorate (360 @ PG4)	
8	PG 3	(660) 180	Research Master's De- gree (120 @ PG3)	Structured Master's De- gree (60 @ PG3)		Research Master's Degree (120 @ PG3)	Structured Master's Degree (60 @ PG3)
8	PG 2	(600) 180/ 120		Master's Di- ploma (120 @ PG2)	Master's Certificate (72 @ PG2)  (articulation cred- its)		Master's Diploma (120 @ PG2)  Professional Master's De- gree (180 @ PG2)
8	PG 1	(480) 480/ 120	Bachelor Hon- ours Degree (120 @ PG1)	General Postgraduate Diploma (120 @ PG1)	Postgraduate Certificate (72 @ PG1)  (articulation cred- its)	Advanced Career-focused Bachelor's Degree, [e.g.B Tech] (120 @ PG1)	Career-focused Postgraduate Diploma (120 @ PG1)
7		(360) 360/ 120	General Bachelor's Degree (120 @ 7)		Graduate Certifi- cate (72 @ 7)  (articulation cred- its)	Career-focused Bachelor's Degree (120 @ 7)	
6		(240) 240	General Diploma (90 @ 6)		(articulation cred- its)	Career-focused Diploma (90 @ 6)	
5		(120) 120			Foundation Certifi- cate (72 @ 5)	Career-focused Certificate (72 @ 5)	
4		(120) 120	FETC (72 @ 4)		Bridging Certificate (72 @ 4)	FETC (72 @ 4)	



## Levels on the NQF

NQF Levels	HE Sub-levels
8	PG4
8	PG3
8	PG2
8	PG1
7	
6	
5	
4	

SAQA has assigned 4 levels on the NQF to Higher Education, Levels 5 to 8, with Level 8 being open-ended. The 1<sup>st</sup> column in the framework specifies the NQF levels for HE. After consultation with SAQA on the need for more levels, the CHE proposes that our current qualifications can best be accommodated within the 4 levels by dedicating Levels 5 to 7 to undergraduate study, and the open-ended Level 8 to postgraduate study, which requires 4 sub-levels: postgraduate sub-levels 1 – 4. NB The exception to the rule is the 480 credit Advanced Bachelor's Degree which, although an undergraduate degree, is pegged at Level 8: PG1.

Traditionally, HE qualifications have been structured according to years of study in roughly a 7 year plus structure. This traditional structuring is captured in the 2<sup>nd</sup> column headed **HE Normative levels & Sub-levels**, which shows how the traditional qualifications structure has been accommodated through the creation of postgraduate sub-levels in the open-ended Level 8.

Level 4 represents the highest level of the Further Education and Training Band, and is not part of the Higher Education and Training Band. If access to HE is to be widened, it is important to ensure the articulation of qualifications between Levels 4 and 5.

### Three Columns or Tracks on the Qualifications Framework

NQF Level	HE Sub-levels	(Cumulative totals) & minimum credits qualification	General Vertical articulation	Articulation Horizontal & diagonal articulation	Career-focused Vertical articulation
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The General Track contains those qualifications which traditionally have been offered only by universities, and which are based on academic, discipline-based and cognitive theories of learning. The qualification designators, *of Arts, of Science, of Social Science* and *of Commerce* may be used only for degrees in this track.

The Articulation Column is a unique feature of the South African HE qualifications framework, designed to enable *horizontal and diagonal articulation* between qualifications on the framework, (as well as the normal *vertical articulation*). This will facilitate meaningful articulation between qualifications in the two different tracks, for example, by allowing a learner with a BSc at Level 7 on the General Track to first acquire a Graduate Certificate at Level 7 in the Articulation Column, before entering a Level 8 programme in the Career-focused Track. The Articulation Column is a curriculum 'space' where learners who do not meet the full entry requirements for their target programmes can 'catch up' without having to 'go back to the beginning again, and where RPL can be implemented. Depending on their learning needs and previous qualifications, learners may be required to earn either specified articulation credits or whole certificates in the Articulation Column, prior to admission to target mainstream programmes.

The Career-focused Track contains the qualifications traditionally offered by technikons, and the professional qualifications traditionally offered by universities. The term *Career-focused* is used to broaden this category to include specialised programmes with a specific career focus that are not necessarily linked to a professional or statutory body. Qualifications in this track are based on vocational, career-based or professional understandings of learning, giving them a more applied, practical and market-orientated focus. Qualification designators used for degrees in the Career-focused Track are open-ended and are used to signify the professional or career focus, e.g. a *Bachelor of Engineering, of Technology, of Education, of Social Work, of Nursing, of Agriculture*, etc.

## Credit-ratings

NQF Level	HE Sub-levels	(Cumulative minimum totals) & minimum credits for qualification
8	PG 4	(1020) 360
8	PG 3	(660) 180
8	PG 2	(600) 180/ 120
8	PG 1	(480) 480/ 120
7		(360) 360/ 120
6		(240) 240
5		(120) 120
4		(120) 120

The CHE proposes that the full-time equivalent taught /coursework academic year be calculated at 30 weeks and the average full-time equivalent student be expected to work a 40-hour week, giving a total of 1 200 study hours p.a. On the SAQA credit-rating system of 10 *notional* study hours per credit, the minimum number of credits per taught academic year is 120. 120 credits is also the SAQA minimum requirement for a whole qualification. Thus we have allocated a minimum of 120 credits per level for Levels 5 to 8: PG1.

The CHE proposes that the full-time post-graduate research-based academic year be calculated at 45 weeks, giving a minimum credit-rating of 180 credits per academic year. This means that Master's degrees are credit-rated at a minimum total of 180 credits and Doctoral degrees at 360 credits (2 x 180).

Cumulative minimum totals are given in brackets, e.g. at the end of Level 7 a student will have earned a minimum cumulative total of 360 credits.

Credit-ratings for qualifications are determined by the total minimum number of credits for the whole qualification and by the minimum number of credits to be attained at the qualification's exit-level. In this example, the General Diploma requires 240 credits in all, of which 90 are to be attained at Level 6.

In these examples the General Bachelor's Degree requires 360 credits in all, of which 120 must be at Level 7, whilst the Graduate Certificate requires 120 credits in all, of which 72 must be at Level 7.

(360) 360/ 120	General Bachelor's Degree (120 @ 7)	Graduate Certificate (72 @ 7)
		(articulation credits)
(240) 240	General Diploma (90 @ 6)	(articulation credits)

## Qualification Types at Access Level

Bridging Certificates will allow learners to complete or improve Level 4 qualifications and so meet the entry requirements for specific HE programmes

An FETC will be the statutory minimum admissions requirement for HE programmes in both tracks

Foundation Certificates will be subsidised as 'academic development' programmes; these allow conditional entry to HE and provide a foundation of academic and generic skills

5		(120) 120		Foundation Certificate (72 @ 5)	Career-focused Certificate (72 @ 5)
4		(120) 120	FETC (72 @ 4)	Bridging Certificate (72 @ 4)	FETC (72 @ 4)

## Qualification Types at Levels 5 and 6

The General Diploma focuses on developing basic academic and generic competence for a range of careers; it should not be offered unless marketable; it is usually an exit-point from the General Bachelor's Degree

The Career-focused Certificate certifies basic competence in a vocational or occupational field; the learner should be able to exit into a specific role in the workplace

This is either a stand-alone qualification or an exit-point from a Career-focused degree programme; it has a strong vocational or career focus, preparing learners for a specific role in the labour market

6		(240) 240	General Diploma (90 @ 6)	(articulation credits)	Career-focused Diploma (90 @ 6)
5		(120) 120		Foundation Certificate (72 @ 5)	Career-focused Certificate (72 @ 5)



## Qualification Types at Level 7

7		(360) 360/ 120	General Bachelor's Degree (120 @ 7)	Graduate Certificate (72 @ 7) (articulation credits)	Career-focused Bachelor's Degree (120 @ 7)
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These are the traditional BA, BSc, BSocSci or BComm degrees usually based on 1 or 2 majors, offering greater flexibility and student choice than Career-focused programmes and leading to a range of career or further study options

This degree will replace the traditional 3-year Diploma offered by Technikons; it includes experience in a workplace context; graduates should be prepared to apply learning to particular employment contexts

The Grad Cert is a focused, introductory qualification, allowing students to move to a new field, track or career after their first degree; it can also be used to implement RPL

## Qualification Types at Level 8: PG 1

8	PG 1	(480) 480/ 120	Bachelor honours Degree (120 @ PG1)	General Postgraduate Diploma (120 @ PG1)	Postgraduate Certificate (72 @ PG1) (articulation credits)	Advanced Career-focused Bachelor's Degree, [e.g. B Tech] (120 @ PG1)	Career-focused Postgraduate Diploma (120 @ PG1)
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The General PG Diploma is a stand-alone discipline-based qualification, offering further specialisation or a new focus after a first degree; it allows entry to Master's degrees in the General Track

The PG Cert will usually offer additional research training in preparation for entry to Master's degrees, or an opportunity to prepare for a change of direction, or to implement RPL

The Career-focused PG Diploma is a stand-alone career-focused qualification, offering further professional development or a new focus after a first degree; it allows entry to Master's degrees in the Career-focused Track

This is the traditional preparation for a Research Master's Degree, following on from a first degree at Level 7

Traditionally this was a professional qualification or a BTech; often a license to practice a profession; this category has been widened to include those advanced, applied degrees which are not necessarily endorsed by a professional body

## Qualification Types at Level 8: PG 2

The Master's Certificate is a stand-alone discrete, specialised qualification for advanced professional development, or for preparation for a new area of study at Level 8

This is a full Master's degree offered only in the Career-focused Track, requiring 180 credits on advanced professional theory, reflection and practice; it is pegged at sub-level PG 2 because there is no sustained research requirement

The Master's Diploma is offered in either track: as a stand-alone qualification; it certifies advanced professional or disciplinary competence but does not require research competence; it also serves as an exit-point from the Structured Master's for those who fail to complete the research component

8	PG 2	(600) 180/ 120		Master's Diploma (120 @ PG2)	Master's Certificate (72 @ PG2) (articulation credits)	Master's Diploma (120 @ PG2)	Professional Master's Degree (180 @ PG2)
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## Qualification Types at Level 8: PG 3 and 4

The Research Master's Degree is the normal preparation for a PhD; it is offered in either track; it is a 180 credit qualification requiring a minimum of 120 credits of research reported in a thesis

The Structured Master's Degree is offered in either track; it is a 180 credit qualification comprising a coursework and a research component, the latter requiring a minimum of 60 credits

This is traditionally the most advanced research degree, culminating in a thesis worth 360 credits, offered in either track

The Professional Doctorate is offered only in the Career-focused Track; it comprises 360 credits worth of advanced, applied research, usually by a practising professional in a professional context

8	PG 4	(1020) 360		Doctor of Philosophy (360 @ PG4)		Doctor of Philosophy, Professional Doctorate (360 @ PG4)
8	PG 3	(660) 180		Research Master's Degree (120 @ PG3)	Structured Master's Degree (60 @ PG3)	Research Master's Degree (120 @ PG3) Structured Master's Degree (60 @ PG3)

## ANNEXURE H

### SECRETARIAL PROFILE - 2003 (KONDOWE: MIRKON SECRETARIAL CONSULTANCY)

Office Manager	<b>Qualifications:</b> Degree in Business Administration/Secretarial Diploma, with five years' experience
<b>Other:</b> <ul style="list-style-type: none"> <li>❖ Interpersonal skills</li> <li>❖ Leadership skills</li> <li>❖ Business Knowledge</li> <li>❖ Business Communication skills</li> <li>❖ Team Player</li> <li>❖ Information research</li> <li>❖ Business English</li> <li>❖ Business ethics</li> <li>❖ Business dress code</li> <li>❖ Honesty/Trust</li> <li>❖ Integrity</li> </ul>	<b>Duties and Responsibilities</b> <ul style="list-style-type: none"> <li>❖ Dealing with work groups involving the Director or Chairman</li> <li>❖ Writing / compiling her / his own correspondence</li> <li>❖ Proof-reading – her own and other people's documents</li> <li>❖ Doing follow-ups for feedback on projects</li> <li>❖ Taking minutes for the Board of Directors, Council, etc, at a very high level</li> <li>❖ Screening calls</li> <li>❖ Handling incoming and outgoing mail</li> <li>❖ Sorting and distribution of e-mail</li> <li>❖ Communication</li> <li>❖ Getting involved in management projects</li> <li>❖ Typing reports, correspondence and presentation materials</li> <li>❖ Doing presentations, when required</li> <li>❖ Dealing with high-profile people, e.g. politicians, diplomats and business people</li> <li>❖ Dealing with personnel in organisation</li> <li>❖ Hosting important functions</li> <li>❖ Representing the Director or Chairman at meetings or functions</li> <li>❖ Meeting delegates on behalf of the Director or Chairman on arrival from other countries or places</li> <li>❖ Dealing with reporters (depending on the organisation's activities and the authority granted to do so)</li> <li>❖ Making travel and hotel bookings</li> <li>❖ Booking meeting venues</li> <li>❖ Client liaison at a high level</li> <li>❖ Establishing secretaries' forum, if there is none.</li> <li>❖ Making sure that the rules and regulations of the organisation are followed by other secretaries</li> <li>❖ Co-ordinating training for secretaries</li> <li>❖ Preparing job profiles for junior secretaries in co-operation with HR Department</li> <li>❖ Delegating work to juniors</li> <li>❖ Recommending secretarial skills to the management</li> <li>❖ Recommend good business software to the management</li> <li>❖ Updating of the important administration information</li> <li>❖ Supervision of junior secretaries</li> <li>❖ Upkeep of filing</li> <li>❖ Upkeep of office</li> </ul>

<b>MANAGEMENT</b>	Drafting budgets, project management, events management, business ethics. Business knowledge
<b>ADMINISTRATION</b>	Processing of the routine administration documentation e.g. cheque requisitions, petty cash, ordering of stationery
<b>OTHER</b>	Knowledge, information, expertise
<b>PERSONAL SKILLS</b>	People skills, interpersonal skills, personality
<b>DIPLOMATIC</b>	Business protocol (being able to deal with politician, business people; diplomatic etiquette)
<b>BEHAVIOUR</b>	Open to change, flexibility, team player, independence
<b>COMMUNICATION</b>	Listening skills, paying attention to detail, assertiveness (helps to control and take decisions). Professional message taking, liaising with clients, image principles and knowledge of protocol
<b>EXPERIENCE</b>	Expertise in your career field of technology etc.
<b>TECHNICAL</b>	Knowledge of technology, proof-reading, competence in e-mail and voice mail, minute taking

<b>Personal Assistant</b>	<b>Qualifications:</b> <b>Secretarial Diploma with four years' experience</b>
<b>Other:</b> <ul style="list-style-type: none"> <li>❖ <b>Interpersonal skills</b></li> <li>❖ <b>Leadership skills</b></li> <li>❖ <b>Business Knowledge</b></li> <li>❖ <b>Business Communication skills</b></li> <li>❖ <b>Team Player</b></li> <li>❖ <b>Information research</b></li> <li>❖ <b>Business English</b></li> <li>❖ <b>Business ethics</b></li> <li>❖ <b>Business dress code</b></li> </ul>	<b>Duties and responsibilities</b> <ul style="list-style-type: none"> <li>❖ Dealing with work groups involving the Managing Director, Senior General Manager, etc.</li> <li>❖ Writing her / his own correspondence</li> <li>❖ Proof-reading – her / his own documents and those of her / his Director and Chairman</li> <li>❖ Doing follow-ups for feedback on projects</li> <li>❖ Minute-taking</li> <li>❖ Screening of her / his manager's calls</li> <li>❖ Diary co-ordination (Create some space for administration purposes and for the manager to travel between meetings)</li> <li>❖ Diary co-ordination – her / his own diary</li> <li>❖ Electronic diary</li> <li>❖ Extracting information from files and preparing draft reports</li> <li>❖ Taking dictation</li> <li>❖ Handling incoming and outgoing mail</li> <li>❖ Typing reports, correspondence, etc.</li> <li>❖ Dealing with high-profile people, e.g. politicians, diplomats and business people</li> <li>❖ Dealing with organisation personnel</li> <li>❖ Hosting important functions</li> <li>❖ Representing her manager at meetings or functions</li> <li>❖ Meeting delegates on behalf of the Director or Chairman on arrival from other countries or places</li> <li>❖ Looking after the Director's or Chairman's office (keeping her / his superior's office neat and tidy)</li> <li>❖ Preparing job profiles for other secretaries</li> <li>❖ Making travel and hotel bookings for the Director or Chairman</li> <li>❖ Booking meeting venues</li> <li>❖ Liaising with clients</li> <li>❖ Establishment of secretary's forum</li> <li>❖ Attending and supporting secretaries' forum meetings</li> <li>❖ Recommending secretarial skills to the management</li> <li>❖ Co-ordinating training for junior secretaries</li> <li>❖ Recommend good business software to the management</li> <li>❖ Updating important administration information</li> <li>❖ Supervision of junior secretaries</li> </ul>

<b>Executive Secretary/Administrative Officer/Assistant</b>	<b>Qualification:</b> <b>Secretarial Diploma with three years' experience</b>
<b>Other:</b> <ul style="list-style-type: none"> <li>❖ <b>Interpersonal skills</b></li> <li>❖ <b>Leadership skills</b></li> <li>❖ <b>Business Knowledge</b></li> <li>❖ <b>Business Communication skills</b></li> <li>❖ <b>Team Player</b></li> <li>❖ <b>Information research</b></li> <li>❖ <b>Business English</b></li> <li>❖ <b>Business ethics</b></li> <li>❖ <b>Business dress code</b></li> </ul>	<b>Duties and responsibilities</b> <ul style="list-style-type: none"> <li>❖ Dealing with work groups involving the Managing Director, Senior General Manager, etc.</li> <li>❖ Writing her / his own correspondence</li> <li>❖ Doing follow-ups for feedback on projects</li> <li>❖ Minute-taking</li> <li>❖ Screening calls for manager(s)</li> <li>❖ Extracting information from files and preparing draft reports</li> <li>❖ Taking dictation from her manager(s)</li> <li>❖ Handling incoming and outgoing mail</li> <li>❖ Typing reports, correspondence, etc.</li> <li>❖ Interpersonal skills</li> <li>❖ Dealing with high-profile people, e.g. politicians, diplomats and business people</li> <li>❖ Dealing with organisation personnel</li> <li>❖ Hosting important functions</li> <li>❖ Meeting delegates on behalf of the Director or Chairman on arrival from other countries or places</li> <li>❖ Keeping her / his manager's office neat and tidy, and having files easily accessible</li> <li>❖ Making travel and hotel bookings for the manager(s)</li> <li>❖ Booking meeting venues for general meetings</li> <li>❖ Liaising with clients</li> <li>❖ Supervision of junior secretaries</li> <li>❖ Delegating work to juniors</li> <li>❖ Monitoring or checking the work of junior secretaries</li> <li>❖ Updating of important administration information</li> <li>❖ Upkeep of filing</li> </ul>

<b>Senior Secretary</b>	<b>Qualification:</b> <b>Secretarial Diploma with two years experience</b>
<b>Other:</b> <ul style="list-style-type: none"> <li>❖ <b>Interpersonal skills</b></li> <li>❖ <b>Leadership skills</b></li> <li>❖ <b>Business Knowledge</b></li> <li>❖ <b>Business Communication skills</b></li> <li>❖ <b>Team Player</b></li> <li>❖ <b>Information research</b></li> <li>❖ <b>Business English</b></li> <li>❖ <b>Business ethics</b></li> <li>❖ <b>Business dress code</b></li> </ul>	<b>Duties and Responsibilities</b> <ul style="list-style-type: none"> <li>❖ Dealing with work groups involving the manager, etc.</li> <li>❖ Writing her / his own correspondence and checking it</li> <li>❖ Minute-taking</li> <li>❖ Diary co-ordination and create some space for administration purposes.)</li> <li>❖ Handling incoming and outgoing mail</li> <li>❖ Taking dictation from the manager</li> <li>❖ Extracting information from files and preparing draft reports</li> <li>❖ Typing reports, correspondence, etc.</li> <li>❖ Dealing with politicians, diplomats and business people</li> <li>❖ Hosting important functions</li> <li>❖ Representing her manager</li> <li>❖ Meeting delegates on behalf of her / his manager on arrival from other countries or places</li> <li>❖ Looking after her / his manager's office</li> <li>❖ Making travel and hotel bookings</li> <li>❖ Booking meeting venues for her / his manager's meetings</li> <li>❖ Liaising with clients in her department</li> <li>❖ Upkeep of filing</li> </ul>

## ANNEXURE I

### JOB DESCRIPTION: EXECUTIVE SECRETARY (SECRETARIAL CONSULTANCY)

NAME	MISS/MRS X
DEPARTMENT	PERSONNEL DEPARTMENT
POSITION	EXECUTIVE SECRETARY
REPORTING TO	GENERAL MANAGER
THE SECRETARY'S DAY	<p>The secretary's day seldom follows a set pattern. Posts are alike, but the following list of activities are representative of a typical day in the life of a secretary.</p> <p><b>At the beginning of the day</b></p> <ul style="list-style-type: none"> <li>• Screening the mail and date stamp it, and attach to it the relevant files or folder for the manager's attention.</li> <li>• Refer to your diary to ascertain your manager's and your own engagements for the day; locate relevant files and papers in connection with these and bring forward any files requiring action.</li> <li>• Place all incoming mail and files (brought forward) in your manager's "in-tray".</li> <li>• Access and print out e-mail messages from your computer mailbox.</li> <li>• Draw the attention of your manager to any urgent items in the mail or in the day's activities.</li> <li>• <b>Check that the entries in your diary correspond with those in your manager's diary</b></li> <li>• Update calendars, visual control boards, computer data, etc.</li> <li>• Read journals, reports, etc., and mark any items which will be of interest to your manager</li> </ul> <p><b>During the day</b></p> <ul style="list-style-type: none"> <li>• Receive dictation from your manager and transcribe it.</li> <li>• Arrange for copying of documents to be undertaken as required by your manager.</li> <li>• File yesterday's correspondence. Receive and make telephone calls.</li> <li>• Keep the manager's diary, arrange his appointment and engagements; assist your manager in planning his/her day in order to ensure the most effective use of his/her time.</li> <li>• Make the manager's travel arrangements.</li> <li>• Ensure that all correspondence and enquiries have been processed and actioned where necessary and that all records are filed accurately for speedy retrieval.</li> <li>• Administer an effective follow-up system.</li> <li>• Organise and attend meetings.</li> <li>• Organise the manager's office, maintaining wall-charts and statistical data.</li> <li>• Supply information using fax and database services and reference.</li> <li>• Books, circulate information as directed by the manager.</li> <li>• Control the manager's petty cash, bank transactions and expense claims forms.</li> <li>• Supervising junior secretarial staff and administering their induction training job allocation, appraisal, disciplinary and complaint procedures.</li> <li>• Deal with bank transactions and draw cash, as required, for purchases.</li> <li>• Complete expense forms from receipts and vouchers.</li> <li>• Deal with any tasks allocated (in your diary) for today.</li> </ul>
THE SECRETARY'S DAY (CONTINUED)	<p><b>At the end of the day</b></p> <ul style="list-style-type: none"> <li>• <b>Refer to your diary and notify reception of any visitors expected tomorrow.</b></li> <li>• If your manager has to be away from the office early in the morning, supply any itinerary and relevant papers.</li> <li>• Ensure that all correspondence have been signed, enclosures attached and the envelopes prepared for dispatch.</li> <li>• Organise conferences and special events, as required.</li> <li>• Order stationery and maintain stationery inventory and office materials for the manager's office.</li> <li>• Comply with the company's health, safety and security regulations.</li> <li>• Receive and entertain visitors.</li> <li>• Use the computer for sending messages to staff, including dates of meetings.</li> <li>• Arrange appointments and enter these in both diaries; make the necessary arrangements.</li> <li>• Organise and undertake work as required by your manager.</li> </ul>



## ANNEXURE J

### JOB DESCRIPTION (COMPANY X)

<b>JOB IDENTIFICATION</b>  <b>JOB TITLE : SECRETARY</b> <b>DIVISION : CORPORATE</b> <b>DEPARTMENT: CORPORATE</b> <b>SECTION : CEO</b>	<b>JOB SUMMARY</b>  To function as support to management by organizing diaries, screening telephone calls, taking messages, typing, handling confidential information, filing, booking travel arrangements, maintaining all general administration tasks and giving training, when required
<p style="text-align: center;"><b>RESPONSIBILITY STRUCTURE</b></p> <div style="text-align: center;"> <div style="border: 1px solid black; width: 250px; height: 60px; margin: 0 auto; display: flex; align-items: center; justify-content: center; margin-bottom: 10px;">CEO</div> <div style="width: 1px; height: 30px; background-color: black; margin: 0 auto;"></div> <div style="border: 1px solid black; width: 220px; height: 50px; margin: 0 auto; display: flex; align-items: center; justify-content: center; margin-bottom: 10px;">SECRETARY</div> <div style="width: 1px; height: 30px; background-color: black; margin: 0 auto;"></div> <div style="border: 1px solid black; width: 180px; height: 40px; margin: 0 auto; display: flex; align-items: center; justify-content: center;">             MOTOR VEHICLE DRIVER           </div> </div>	
<b>DESCRIPTION OF RESPONSIBILITIES AND AUTHORITIES</b>	
Management and control of Vehicle Driver	

JD 005

CONTROL COPY: .....

LIST OF RESPONSIBILITIES	REFERENCE MAN. PROC. NR.
<ol style="list-style-type: none"> <li>1. Consult with CEO, General Manager: Operations Business Unit and Snr Manager: National Business Unit, regarding their diaries for the day and week ahead, as well as furnishing them with information regarding telephone calls, visitors and business trips.</li> <li>2. Handling of private matters for CEO, Financial Director.</li> <li>3. Assist Chairman and Directors in all matters when required.</li> <li>4. Assist Management when required.</li> <li>5. Schedule appointments and meetings.</li> <li>6. Remind managers of birthdays and other personalia.</li> <li>7. Handle incoming and outgoing mail.</li> <li>8. Reception of customers.</li> <li>9. Screening of telephone calls.</li> <li>10. Typing of all confidential correspondence and documents.</li> <li>11. Dictaphone typing.</li> <li>12. Taking minutes at meetings.</li> <li>13. Taking shorthand notes.</li> <li>14. Translating of documents.</li> <li>15. Writing and preparing memos, letters, faxes, minutes, etc.</li> <li>16. Maintain filing systems.</li> <li>17. Compiling documents for meetings, training, etc.</li> <li>18. Responsible for/or help with arranging functions, ordering or providing snacks for meetings, etc.</li> <li>19. Arrange bookings for business trips.</li> <li>20. Handling petty cash.</li> <li>21. Customer liaison.</li> <li>22. Buying stock for use in the corporate kitchen.</li> <li>23. Arranging for flowers to be delivered to personnel when in hospital or where there is death in the family, or on birthdays.</li> <li>24. See that the offices, boardroom, kitchen and toilets are neat and report anything that needs attention.</li> <li>25. Keep the bookings of the corporate boardroom.</li> <li>26. Arrange a ladies' lunch or tea once or twice a year, to contribute to better employee relationships.</li> <li>27. Send out Christmas cards at the end of the year.</li> <li>28. Help with the Customer Day once a year.</li> <li>29. Responsible to and co-ordinating duties of the Vehicle Driver.</li> <li>30. Assist with computer training, when required.</li> <li>31. Work overtime according to operational requirements.</li> </ol>	

DATE ISSUED: \_\_\_\_\_

COMPILED BY: \_\_\_\_\_

APPROVED BY: \_\_\_\_\_

## **ANNEXURE K**

### **JOB DESCRIPTION: SENIOR SECRETARY (COMPANY Y)**

#### **1. OFFICE MANAGEMENT**

- 1.1. Opening up and locking of offices
- 1.2. Reporting faults
- 1.3. Checking quality of cleaning service
- 1.4. Ensuring water machines are filled and in good working order.
- 1.5. Ordering general supplies for the kitchen.
- 1.6. Emergency floor controller.

#### **2. CUSTOMER SERVICE**

- 2.1. Receive visitors
- 2.2. Handle all enquiries. Refer to the appropriate person(s) if necessary. Ensuring that all enquiries receive the necessary attention and returning all enquiries with a courtesy call.

#### **3. SECRETARIAL DUTIES**

- 3.1. Diary management for manager(s)
- 3.2. Organize meetings and appointments
- 3.3. General typing of letters and memorandums
- 3.4. Compiling Presentations
- 3.5. Organize social functions
- 3.6. Maintaining filing systems
- 3.7. Controlling access to managers
- 3.8. Arrange parking for Johannesburg meetings
- 3.9. Order and receive stationery
- 3.10. Ordering refreshments for meetings and functions. Ensuring the quality is of a high standard.
- 3.11. Answering telephone lines for manager(s). Taking messages and ensuring that calls are returned.
- 3.12. Arranging travel and accommodation for manager(s)
- 3.13. Maintaining a leave record for manager(s) and subordinates
- 3.14. Opening incoming mail and handling it accordingly.
- 3.15. Faxing and copying
- 3.16. Registering for seminars/courses and arranging payment
- 3.17. E-mail management
- 3.18. Register / log maintenance requests for computer-related problems. Ensure that priority requests receive the necessary attention.
- 3.19. Coffee and tea – for managers, visitors and for meetings
- 3.20. Arrange conferences/workshops
- 3.21. Maintain a follow-up system
- 3.22. Updating departmental organization charts
- 3.23. Maintain confidentiality at all times

#### **4. AUXILIARY SERVICES**

- 4.1. Cash and cheque requisitions for service providers who need to be paid for services rendered.
- 4.2. Claims for official travel. Ensuring that it reaches the Salary Office before the due date for payroll.
- 4.3. Check cellphone accounts. Ensure that all the necessary information is supplied for payment purposes. Obtain approval. Copies to all persons.
- 4.4. Prepare and send out birthday cards for personnel

## ANNEXURE L

### JOB DESCRIPTION: PRIVATE SECRETARY (COMPANY Z)

<b>JOB TITLE:</b>	Private Secretary
<b>JOB HOLDER:</b>	
<b>REPORTS TO:</b>	QA Manager/Engineering Manager
<b>DATE:</b>	12 March 2002

<b>1. JOB PURPOSE:</b>
Responsible for all typing for the Engineering & QA Managers, Engineering Department, Machining, PIRY, MMF, Bake, First Aid, QA, and Graphitising to ensure the smooth secretarial services of these departments and secretarial duties, request for capital and personal assistance to the Engineering and QA Managers.

<b>2. DIMENSIONS:</b>
<p><b>FINANCIAL:</b> Maintain records of all capital expenditure requests – approximately 100 projects p.a.</p> <p><b>STAFF:</b> Project &amp; QA engineers report to the secretary on matters such as meetings they are attending, who is relieving who when on holiday for smooth running of work related activities in the department.</p> <p><b>OTHER:</b> Receptionist for the contractors and suppliers visiting the Engineering &amp; QA departments.</p>

<b>3. PRINCIPAL ACCOUNTABILITIES</b>	<b>PERFORMANCE CRITERIA</b>
<p>1) Responsible for all typing for the Engineering &amp; QA Managers, Engineering Department, Machining, PIRY, MMF, Bake, First Aid, QA, and Graphitising to ensure the smooth secretarial services of these departments and secretarial duties, request for capital and personal assistance to the Engineering and QA Managers.</p> <p>2) Types, checks calculations/spelling/data, distributes and keeps record book of all requests for capital received by the department for budget controlling for Engineering Manager.</p> <p>3) Monthly compares computer printouts from Stores with Departmental computer sheets for each vote number to ensure control of expenditure.</p> <p>4) Responsible for all the filing and updating of manuals for Engineering &amp; QA Managers in order to ensure good</p>	

3. PRINCIPAL ACCOUNTABILITIES	PERFORMANCE CRITERIA
<p>record keeping and communication.</p> <p>5) Coordinate all incoming and outgoing mail of Engineering &amp; QA Managers and Engineering Projects &amp; QA departments to ensure good communication and confidentiality.</p> <p>6) Controls all incoming telephone calls for Engineering and QA Managers as well as Projects Engineers on request, according to priority. Deal with external calls from co. and customers.</p> <p>7) Receptions for the Engineering &amp; QA departments.</p> <p>8) Coordinates meetings, appointments and social functions.</p> <p>9) Acts as Secretary for the Quarterly Engineering &amp; QA departmental HS&amp;EP meetings.</p> <p>10) Issuing of stationery for QA and projects departments.</p> <p>11) Responsible for the issuing and control of the co. Best practice and manufacturing instructions.</p> <p>12) Administer the shipping of samples to Europe &amp; USA for testing.</p> <p>13) Calculate cost of scrap for minutes of OPS team meeting.</p> <p>14) Hotel bookings for co. (Quality) visitors.</p> <p>15) Request and distribute current literature citations.</p> <p>16) Make copies and distribute all MN deviations and keep record of it.</p>	

4. CONTEXT
<p><b>a) OPERATING ENVIRONMENT</b></p> <p><b>Internal:</b></p> <p>Clean and pleasant working conditions. Work is done within the parameters of the company policies and procedures.</p> <p>Policies and procedures are well established and all employees are committed to adhere to the policies and procedure.</p> <p>This is a demanding position and requires immediate action to be taken on critical items.</p>

**External:**

Liaise with Department of Labour/Health/Water/ESKOM on matters regarding meetings with the Engineering Manager. Liaise with Process Managers on matters regarding request for capital, typing and work and meetings. Arrange for venue of meetings held by Engineering Manager and Engineers of the Engineering Projects Department. Bookings of small lecture room in the department for meetings with all departments in the plant. Arrange with Security Gate for visitors/suppliers appointments with Engineering Projects Department. Prepare faxes to be sent to suppliers.

**b) FRAMEWORK AND BOUNDARIES****c) ORGANIZATION CHART****5. RELATIONSHIPS (Who and Why)****CONTACTS (Who and Why)****1) Within the company**

The Process Mgrs. For meetings with Engineers in the Projects Department, as well as for general typing, notices, memos, annual budget (daily).

Plant Engineer & QA Mgr. Work-related instructions, discussions and confirmation of meetings and appointments (daily).

Project Engineers/Work-related instructions, discussions and confirmation of meetings  
Draughtsmen/and appointments, General Reception.  
Process Engineers/Snr Lab Assistant

**2) Outside the company**

Suppliers Ensure all outside visitors/enquiries for the department are handled promptly.

Contractors Ensure all enquiries for the department are handled smoothly and promptly. Department of Labour/Ensure smooth handling of queries, and meetings with the Health, ESCOM, Engineering Manager.

Rand Water

**6. KNOWLEDGE AND EXPERIENCE**

**Knowledge:** Matric

**Skills:** Word, Powerpoint and Excel are essential.

**Experience:** 3 Years' secretarial experience

**7. JOB CHALLENGES**

All typing and distribution thereof timeously. Responsible to take messages for people in the Engineering & QA departments.

The typing, distribution and record keeping of requests for capital. Coordinate the cost control of capital on computer.

To know what project each Engineer is busy with, i.e. shutdowns, suppliers/contractors and meetings they attend. When anyone is on holiday, to ascertain who should attend meetings or do their job when they are not available.

**8. ADDITIONAL INFORMATION**

**9. MANAGEMENT CONTENT**

**PLANNING:** Manage and plan all relevant typing work and the distribution thereof for the QA and Engineering Managers as well as engineering department, all departments in the plant. Manage the updating of diary for Engineering Manager and the engineers in projects department & regulate meetings of engineers with other departments.

**ORGANISING:** Self, meetings and venues for Projects & QA Personnel. Braai's for QA & Project departments. Raw material samples sent to Parma for testing.

**CONTROL:** Control all incoming telephone calls for Engineering & QA Managers. Sorting, selecting and distribution of incoming mail. Deciding on priority and format of typing work. Control safety apparel issues, as well as drawing from stores; tea, coffee and cleaning material issues, to prevent irregularities.

Draws and controls the issuing of stationery for the Engineering & QA department in order to ensure even distribution thereof.

Informs security department of visitors expected for Engineering & QA Managers/Projects/QA.

Responsible for general office administration for the Engineering Manager, QA and Projects Departments in order to ensure good communication and planning.