

**Sports, Recreation and Fitness Skills Needs Survey
Stakeholder Interviews and Workshop Report
June 2016**



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1. INTRODUCTION

This Skills Needs Survey, which is based on interviews and workshops with stakeholders in the industry, is part of a broader constellation of research studies conducted in the sport, recreation and fitness industry to gather labour market intelligence on skills needs. It is based on qualitative research methods.

Other studies include a labour market profile, a tracer study, a vacancy analysis survey, a salary survey, and a change drivers study. These tend to use quantitative research methods, with the exception of the latter report.

From a labour market analysis perspective, reliance on a composite of quantitative and qualitative labour market signals and indicators, rather than on a single approach, enables the research team to form judgments on the basis of the weight of labour market evidence.

With labour market research there is a tendency to employ wholly quantitative research methods in the investigation. The usefulness of qualitative research is generally underplayed. Yet, the use of statistical data does not tell the whole story. Insights and nuances can be gathered by engaging with people at the coal-face of the industry. These are people on the ground with the “pulse of the industry in the wrists of their hands”. They tend to offer perspectives that one would not normally obtain from pure quantitative research.

Qualitative research can provide a rich vein of insights, and when used with statistics can tell a powerful story about skills needs in an industry. It is not so much concerned with the volume of participants, but rather the quality, depth and relevance of insights.

The key objectives of this skills needs survey are to:

- Identify key issues impacting on skills on the industry.
- Test the findings of other studies for the purposes of corroborating or disputing evidence.
- Understand the thinking of stakeholders first hand.
- Provide skills development directions for the industry over the next few years.

The workshop discussions and interviews were robust. Participants spoke freely and raised issues of concerns insofar as skills development in the industry are concerned. They had much to say. The substance of these discussions are captured in this report.

There is a need for CATHSSETA to give consideration to the findings in this report, as it tends to resonate with the prevailing thinking in the industry.

This report presents the key discussions and finding, instead of a narrative of all issues raised.

2. KEY POINTS FOR CONSIDERATION

1	There is a need to map out the value chain for sport industry. The role of CATHSSETA within the value chain should be determined. This should be the basis for investments in skills development.
2	CATHSSETA should play a role in the development of school sport, particularly with skills development interventions for the training of coaches and administrators.
3	CATHSSETA should explore ways to work with the South African Sports Federation and Olympic Committee to support the SA Coaching Framework for all sports.
4	At grassroots level, there is a dire need for qualified coaches and coaching courses across all sporting codes. CATHSSETA should examine how it can plug this skills gap.
5	CATHSSETA should engage with the South African Football Association to massify the training of coaches at all levels.
6	In golf, there is a need to regulate the working conditions of caddies. There is also a need to offer training opportunities for caddies – qualifications and learnerships. A career pathway should be developed for caddies.
7	TVET Colleges should offer courses in sport, recreation and fitness, including accredited qualifications and short skills programmes to build capacity in local communities. A partnership should be forged between CATHSSETA and TVET Colleges to respond to local needs.
8	Coaching in local clubs, administration, management and leadership, marketing and communication, life skills and financial management are needed to create a vibrant and competitive sports culture that will lead to good sportsmen and sportswomen in subsequent years.
9	Since considerable research is required in sport, CATHSSETA should reinstate post-graduate bursaries for research.
10	CATHSSETA should improve its efficiencies, customer service and communication with stakeholders.
11	CATHSSETA should establish a strategic partnership with SASCOC to drive the development of coaches in the various sport codes.

3. INTERVIEWS

We have captured the most salient issues emerging from the interviews.

3.1 Interview Questions

Interviews were conducted with key informants who possess knowledge and insight on skills development in the industry.

A semi-structured interview schedule was devised consisting of a mixture of closed and open-ended questions. The use of a semi-structured interview schedule enables the interviewer to deviate from the questions in order to probe deeper into the views and insights of the interviewee. However, all questions on the schedule should be addressed by the end of the interview.

The interview schedule consisted of the following questions:

A SKILLS SHORTAGES					
A1	Is your company currently in need of skilled people in certain types of occupations?				Yes No
A2	Would you say that a shortage of skilled people in your company is an area of concern in the: ¹	Short-term?	Medium-term?	Long-term?	Not a concern at all
A3	Do you think a shortage of skilled people in your company is a risk to the business?				Yes No
A4	Is the risk:	High	Medium	Low	No risk

B RECRUITMENT DIFFICULTIES	
B1	What type of occupations are hard-to-fill or which you have experienced the greatest difficulty in filling vacancies in the last 12 months?
B2	What types of occupations do you expect to be recruiting for your company in the next 12 months?
B3	What are some of the reasons why you cannot find skilled people for posts at your company?
B4	What do you do to compensate if a vacancy cannot be filled? (How does your company cope or deal with skills shortages?)

C SETA AND TRAINING PROVIDERS	
C1	What should the CATHSSETA be doing to address skills shortages in your industry?
C2	What are your views on the quality of training providers in your industry.
C3	List some of the new trends and developments in your industry that is having an impact on skills development.

D GENERAL COMMENTS	
D1	What other comments do you have to make regarding skills development in your company or industry?

¹ (Short-term -1 -2 years; Medium-term 3-5 years; Long-term +5 years)











3.2 Interviewees

The following people were interviewed:

NO	INTERVIEWEE	COMPANY	POSITION
1	Ezera Tshabangu	SASCOC	General Manager: High Performance
2	Saac Mdaka	SASCOC	Coordinator: Coached Development
2	Deon Snyders	Outward Bound	Operations Manager
3	Naeem	Planet Fitness- Parklands	Wellness Manager
4	Magdalen Caldeira	Leopard Creek Country Club	HR Manager
5	Claudia Sibiya	SA Association of youth clubs	HR Officer
6	Aashiq	Planet Fitness- CT City	Wellness Manager
7	Laura Smith	Lane Stables	Owner
8	Nadia Janse van Rensburg	Featherbed Company	SDF
9	Petrie Barnard	M5 Sports group	National Admin Manager
10	Martinus	Untouched Adventures	Owner
11	Rena Hartsenburg	Benoni Country Club	Financial Manager
12	Rizwana Vorajee	Jockey Club SA	HR Manager
13	Michelle	Umhlahli Country Club	HR Representative
14	Renee Reneke	UJ Sport	Sport Scientist
15	Anonymous	Golf Club	HR/Skills Facilitator
16	Gene Webber	Bells Golf Academy	HR Administrator
17	Harris	The Gym Group	General Manager
18	Attie	Marks Park Sports Club	Manager
19	Andy	Cape Diving	Owner
20	Andrew Barton	Links Golf Club	Financial Manager
21	Tarren Naidoo	UJ Sport	Sport Scientist

3.3 Interview Findings

The findings for Section A are as follows:

SKILLS SHORTAGES			
Is your company currently in need of skilled people in certain types of occupations?			
		9 Yes	
		12 No	
Would you say that a shortage of skilled people in your company is an area of concern in the:²			
Short-term?	Medium-term?	Long-term?	Not a concern at all
			
Do you think a shortage of skilled people in your company is a risk to the business?			
High risk	Medium risk	Low risk	No risk
			

² (Short-term -1 -2 years; Medium-term 3-5 years; Long-term +5 years)

RECRUITMENT DIFFICULTIES	
What type of occupations are hard-to-fill or which you have experienced the greatest difficulty in filling vacancies in the last 12 months?	
<ul style="list-style-type: none"> • Food and beverage staff • Chef • Accounting staff • PGA professionals • Skilled coaches • Skilled office personnel • Skilled sport scientist • Director of sport • Welcome desk/reception area staff • Programs manager- youth 	<ul style="list-style-type: none"> • Floor custodian • Fitness instructor/personal trainer • Riding instructor • Medium skilled administrators • Adventure qualifications • Equine veterinary surgeon • Staff to recruit new members (sales) • General maintenance staff • Sport Technical Analysts • Bio-Mechanists
What types of occupations do you expect to be recruiting for your company in the next 12 months?	
<ul style="list-style-type: none"> • Hockey manager • Manager of sport science • Head of high performance • Swimming instructor • Welcome desk/reception area staff • Sales and marketing staff • IT technician • PR manager • Sport Technical Analysts • Bio-Mechanists 	<ul style="list-style-type: none"> • Fitness instructor/personal trainer • Riding instructor • Waitresses/housekeeping • Medium skilled administrators • Brand management • Adventure qualifications • Equine veterinary surgeon • Staff to recruit new members (sales)

RECRUITMENT DIFFICULTIES

What are some of the reasons why you cannot find skilled people for posts at your company?

- The most common reason cited by almost all organisations who reported skills shortages, was the lack of industry-specific **skills/experience/competence**.
- Another reason by organisations in outlying areas was *location*. There is a lack of qualified people within the geographical **location** of the organisations. This resulted in transport issues to and from work, and a general lack of skilled people willing to relocate to places that are based far from urban areas/business hubs. Some organisations in outlying areas also mentioned skills shortages as a result of being unable to pay competitive salaries required by highly skilled professionals.
- A few firms mentioned **BBBEE requirements** making it difficult to recruit skills as they were unable to find suitably skilled BEE candidates to fill positions.
- In the **adventure-related firms** it is difficult to find **skilled people** with adventure-related qualifications and experience, as there are few skilled people in this industry.
- Within the **fitness industry** specifically, it was noted that there is generally **high staff turnover** in roles such as front desk/personal trainers. The industry faces a lot of 'job hopping' in search of better pay. Hence, these vacancies have to be constantly filled.

What do you do to compensate if a vacancy cannot be filled? (How does your company cope or deal with skills shortages?)

- Most respondents reported making use of **existing staff to assist** until a suitable appointment is made, for example, in the case of front desk staff in gyms, existing employees were called upon to assist until a suitable replacement was found.
- In majority of the cases, where employees needed a certain skill to fill a vacancy, they reported pursuing their **own in-house training to up-skill employees**, at their own cost. They recruited from other areas of the business. Trained them to the desired level and then placed them in vacant positions.
- In some cases, **outsourcing** was used to make up for the lack of skills which comes at a high cost. In the horse racing industry, locums are relied upon as there is a shortage of equine veterinary surgeons. IT is another area that was outsourced when suitably skilled employees could not be found.

SETA AND TRAINING PROVIDERS

What should the CATHSSETA be doing to address skills shortages in your industry?

- SETA should fund more **chef internships and learnerships**. Approve more discretionary grants for chefs and horse-racing related training.
- **Food and beverage employees** are in short supply, in the sub-sector.
- CATHSSETA should get actively involved in supporting the development of school coaches at all levels.
- The SETA should work more closely with representative bodies in all sport codes.
- Provide basic **sales and marketing** training and learnerships.
- **Applications for funding** are a cumbersome and time-consuming process. Turnaround times from the SETA are very long. This needs to be addressed
- Develop **vetinarians** and groom them to be skilled equine veterinary surgeons – this should create awareness and stimulate interest in more people pursuing this specialisation.

What are your views on the quality of training providers in your industry.

- Most firms reported pursuing **their own in-house training**, but those which did not, found training in the industry to be of **satisfactory quality**, despite being expensive.
- One respondent noted a lack of accredited training providers in the **Knysna** region, which needs to be addressed.

List some of the new trends and developments in your industry that is having an impact on skills development.

- In the **fitness industry** technology is advancing at a quick pace:
 - Live GPS and heart rate data capturing and interpretation
 - Video analysis
 - New equipment such as SAQ equipment, timing gates, analysis equipment, etc.
- There is a move away from emphasis on weight training in gyms to other forms of exercises such as joining a fitness class/outdoor training (bootcamps), etc.

4. FOCUS GROUP WORKSHOP

A workshop was held for participants in the industry. The purpose of the workshop was to consult with stakeholders about skills needs in the industry.

The objectives of the workshop are to:

- Identify occupations where shortages exist (Hard-to-Fill vacancies) and skills gaps (Top up skills) in organisations.
- Find out what development are influencing the sector and its implications for skills development.
- Discuss issues relating to training providers and training provision.
- Make recommendations on skills development interventions.

4.1 Workshop Questions

The workshop consisted of the following activities:

Activity: Change Drivers in the Industry

What is the skills-related change driver in your industry?	What effect/impact is this change driver having on organisations in the industry?	What intervention(s) do you recommend to address this challenge?	Is this intervention(s) high, medium or low priority?
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Activity: Supply-side Training Provision in the industry?

QUESTIONS
What new qualifications does your industry need that are currently not available? Why?
What current CATHSSETA qualifications do you find very beneficial to your organisations? Why?
What current CATHSSETA qualifications do you find problematic? Why?
What are views on training providers in your industry?
How can CATHSSETA improve training provision in your industry?

Activity: Skills Development Interventions

QUESTIONS
What significant skills development interventions do you recommend to CATHSSETA? Why do you recommend these interventions?
What innovations should be introduced by CATHSSETA? (What should they be doing differently)?

4.2 Workshop Participants

The following people participated at the workshop:

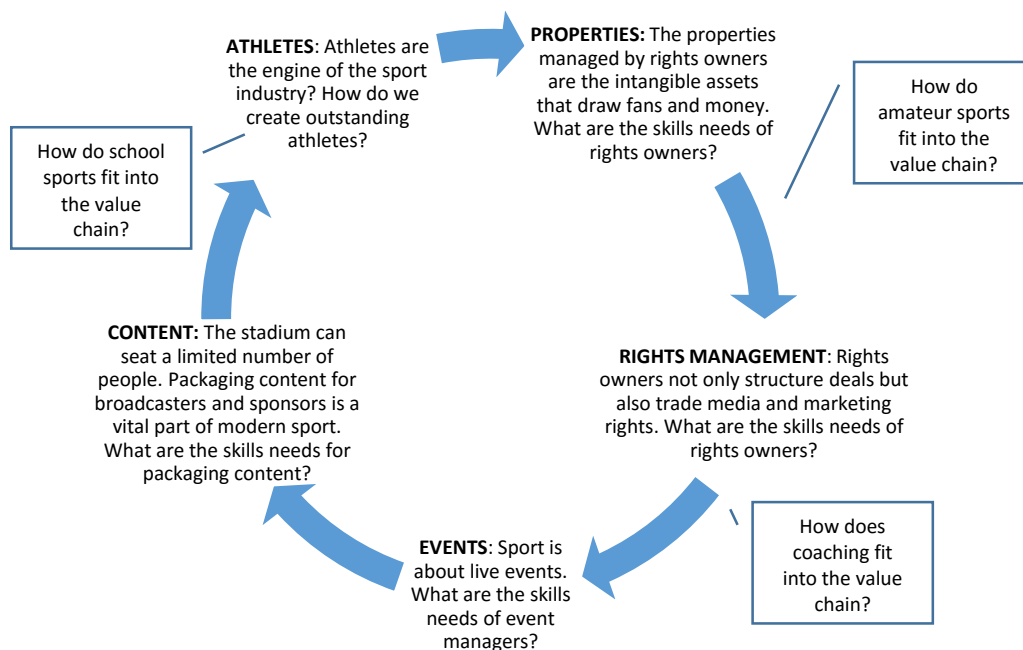
NO	INTERVIEWEE	COMPANY	POSITION
1	Clive Doren	Sports Science Institute of SA	Manager
2	Sekhoho Ntene	The River Club	ETD Consultant
3	Michael Dick	Wits University	Performance Centre Manager
4	Angela van der Klashorst	University of Pretoria	Lecturer
5	Elize Pretorius	Institute of Sports	Training Manager
6	Anta Marx	Athletic South Africa	Development Manager
7	John O' Connor	Institute of Sports	Managing Director
8	Byron Malga	University of Pretoria	Special Projects Manager
9	Helen Herbert	Lifesaving SA	General Manager

4.3 Workshop Findings

The following issues were highlighted:

4.3.1 Understanding the Sport Value Chain

- There is a need for CATHSSETA to understand the sport value chain. Such an understanding will enable the CATHSSETA to make informed decisions about funding skills development in sport. Currently, CATHSSETA has not defined the sport value chain. Therefore, funding windows for sport, recreation and fitness have no impact on the industry.
- The sport industry is a wide-ranging business that spans the field of play from food to memorabilia stands at stadiums to media rights, advertising and sponsorships. This complex business environment features numerous participants from rights owners (clubs, leagues, federations, and athletes) to sports agencies, sponsors, caterers, and broadcasters.
- There is a need to understand the bargaining power of the different role-players in the sport value chain:



- CATHSSETA should conduct a value chain analysis before opening funding windows.
- This is necessary for CATHSSETA to align its scope of coverage to the value chain and determine its skills development priorities for the industry.
- Sports in SA is too narrowly-defined.

4.3.2 Promotion of Schools Sports

- A major reason why South Africa is lacking world-class sportsmen and teams in various codes such as soccer, cricket, athletics, etc. is because the development structures at school levels are lacking.
- With the exception of the ex-Model C schools, hardly any organised school sports is taking place in the previously disadvantaged areas of the country. Competitive sports are not being played in the majority of our schools. There any few qualified and capable instructors/coaches in schools.
- Private and a few ex-Model C schools, who charge very high school fees, make provision for competitive sports and coaching for learners. It is learners from these teams that filter into the provincial and national cricket and rugby teams. Therefore, a minority of privileged learners get the opportunity and training to play sports at a professional or competitive level.
- Soccer, the number one sport in the country, has a national team who performs dismally year after year. Domestic professional clubs are outperformed on the African continent. Our best players are not playing in the major leagues of the world. The

administration of soccer is a problem. There are not enough qualified and proficient coaches at all levels in the game. The same can be said for many other sporting codes.

- The European Coaching Licence is very expensive and effectively limits access to potential coaches. The South African Football Association (SAFA) is responsible for all soccer coaching, but does not have the infrastructure or commitment to role training out nationally at all levels.
- We are lacking a USSASA type of umbrella body to manage school sports collectively under one body. The primary mandate of this body is to ensure that all learners in the country have access to organised school sport activities.
- A USSASA type of structure is a way to ignite participation in schools for the nation.
- Currently, there are a range of problems in schools that should be addressed. These include: poor facilities and no facilities, lack of coaches, poor running of sports in schools, lack of funding, disinterest by educators, lack of oversight by education departments, and so on.
- Whilst CATHSSETA is not responsible for the promotion and management of school sports, we need to determine the role of CATHSSETA in school sports. It should be playing a constructive role, since these learners are the players for professional clubs and national teams in the future.
- Again this boils down to establishing a value chain for sport and determining the role of CATHSSETA within it.
- CATHSSETA should conduct research on the state of school sports, its nature and its role in society. It should suggest meaningful solutions to improve the state of school sports.

4.3.3 State of Coaching

- There is a need to upskill unqualified coaches through the introduction of some form of regulation/accreditation of coaches into the industry in most sporting codes, to introduce quality control through professional supervision, and to ensure on-going professional development. In sports such as soccer, there is regulation, but there is not sufficient access to enter the coaching programme due to poor management of the programme, limited number of intakes and funding issues.
- The biggest hindrances to coaching within clubs were cited as the lack of funding, facilities and training opportunities.
- At school level, the coach is usually a physical education teacher that lack the knowledge and skills to provide learners with foundational skills to play sports. Usually a male and female PE teacher is responsible for coaching the entire school population.

- There is also a lack of master coaches in the system, who should be training potential coaches.
- On the positive side, the South African Sports Federation and Olympic Committee (SASCOC) has developed the South African Coaching Framework that will create an effective, inclusive, cohesive and ethical coaching system that promotes transformation and excellence in an active and winning nation.
- The Framework aims to provide skilled and qualified coaches to support the development of South Africans at all levels in sport. This will in turn unearth new talent, provide widened access to sport and further promote South Africa as a nation committed to mass participation and sporting excellence.
- The Framework will be focused on the needs of South African sport and will draw on international best practice. This will be achieved through the development of core objectives, programmes and templates, with delivery being led by National Federations. NFs will be responsible for working with coaches and stakeholders at district, provincial, national and international levels.
- CATHSSETA should determine what role it can play in the promotion of this Framework.
- Investment will be required to implement the Framework in the following areas: employment and deployment of coaches, education and development of coaches, capacitating the National Federations, capacitating national, provincial, municipal and local organisations. The Framework will focus on the quality and quantity of coaching as well as the extent to which sustainable structures are being developed to meet the needs of South African sport.
- There is a lack of training providers, coaching courses and master coaches across most sporting codes.
- An example of the poor management of sport is in golf. There is no regulation whatsoever for the training of caddies. They are used as casual workers. There is a need to regulate the working conditions of caddies. There is also a need to offer training opportunities for caddies – qualifications and learnerships. A career pathway should be developed for caddies. Some of these caddies are very good golfers and have the potential to coach golf or become golfers.

4.3.4 Role of TVET Colleges

- There is no provision in public TVET Colleges in SA to offer accredited qualifications and non-accredited skills programmes to its communities.

- TVET Colleges have the facilities, but seems to lack interest in developing training for the industry.
- There facilities can also be used as night schools for the many sports clubs in their locality to train in sports management and administration and coaching.
- The CATHSSETA should have a conversation with TVET Colleges and twin them with federations and associations in their respective areas with a view to promoting sports for leisure and business.
- On the other hand, there are a few large private training providers that offer hundreds of students accredited qualifications in sport administration and management each year. These courses have no work placement component and lack a particular industry focus. As a result, many graduates cannot find employment in the sport industry. It has become a money-making enterprise for these institutions.

4.3.5 Funding Constraints

- The federations, associations and clubs across all sporting codes are either exempt from skills levies, or instances, where levies are paid they are very small. Most of the administration of sports takes places on a voluntary basis, with a very small core staff in representative organisations. Consequently, in organisations especially at grassroots levels, where funding is desperately needed it is not available from the CATHSSETA.
- Coaching in local clubs, administration, management and leadership, marketing and communication, life skills and financial management are needed to create a vibrant and competitive sports culture that will lead to good sportsmen and sportswomen in subsequent years. The training required for members of clubs at local, regional or national levels should involve short accredited skills programmes for the most part. There are cases for full qualifications, but this is not needed in most instances.
- Previously, the CATHSSETA funded post-graduate research based on the research needs articulated by the SETA. This has been discontinued, but given the needs to know more about the sports, recreation and fitness industry, there is a strong case to restart this funding window.

4.3.6 Communication and Bureaucracy

- The lack of communication between CATHSSETA and its stakeholders is a problem. It needs to have regular interactions with stakeholders either through regional or chamber skills development forums. Stakeholders should be kept abreast of developments in the SETA and articulate their needs and concerns to the CATHSSETA.

- Payments of discretionary grants to training providers and member organisations is a major problem. There are incessant delays in funding which is a “nightmare” for training providers, many of which are small enterprises.
- Communication with the CATHSSETA office is always a problem because of high staff turnover.

5. THE CASE FOR SOUTH AFRICAN SPORT CONFEDERATION AND OLYMPIC COMMITTEE (SASCOC)

SASCOC is the controlling body for all high performance sports codes in South Africa.

What is SASCOC doing for the development of coaching?

- SASCOC has developed The **South African Coaching Framework**³ whose vision is to create an effective, inclusive, cohesive and ethical coaching system that promotes transformation and excellence in an active and winning nation.
- The formulation of the South African Coaching Framework 2010—2018 is a direct result of an inclusive process of consultation by SASCOC supported by the Department of Sport and Recreation South Africa (SRSA) and other key stakeholders.
- The Framework aims to provide skilled and qualified coaches to support the development of South Africans at all levels in sport.
- The Framework will be focused on the needs of South African sport and will draw on international best practice.
- This will be achieved through the development of core objectives, programmes and templates, with delivery being led by National Federations. NFs will be responsible for working with coaches and stakeholders at district, provincial, national and international levels.
- The answer is simply to develop a system and structures for coaching. The Framework will develop new coaching pathways and standards for all the South African sporting codes that will support the different stages of development, participation and excellence.

³ SASCOC. 2012. South African Coaching Framework. www.sascoc.co.za

What is CATHSSETA's priority for skills development in the Sport, Recreation and Fitness Industry?

- Notwithstanding the fact, that constituent members contribute a small sum by way of skills levies to the SETA, there is a very strong case for CATHSSETA to make adequate funding available to this industry via SASCOC on the grounds of the following:
 - Sport, recreation and fitness is a public good and vital for the well-being of the whole nation.
 - Sport contributes to a range of other industries, including, but not limited to: tourism, travel, hospitality, events management, entertainment, media, transport, wholesale and retail, manufacturing, and so on.
- Instead of funding a multitude of skills development initiatives in this industry, which collectively have hardly any impact on the industry, CATHSSETA should rather adopt the 80/20 principle by asking a simple question: what are 20% of the things we should be doing for the industry that will have 80% impact?
- **Viewed from this context, CATHSSETA should focus on one issue that will likely have the most significant impact not just on sport, but on the entire nation – that is – funding coaching through the vehicle of SASCOC.**
- **CATHSSETA should invest in the implementation of the Framework in the following areas: employment and deployment of coaches, education and development of coaches, capacitating the National Federations, capacitating national, provincial, municipal and local organisations.**
- **Ideally a sum of R65 million a year (adjusted to inflation y-o-y) should be invested by CATHSSETA into sports coaching via SASCOC structures.**
- SASCOC should be responsible for measuring the impact of the South African Coaching Framework on an on-going basis to ensure that all the elements focus on the quality and quantity of coaching as well as the extent to which sustainable structures are being developed to meet the needs of South African sport.
- SASCO has already developed structures and system for a national roll-out of coaching in the long-term. Hence, there is no need for CATHSSETA to “reinvent the wheel”.
- The SASCOC **Model for Long-Term Coach Development**⁴ involves the following:
 - Four roles which are: Assistant Coach; Coach; Senior Coach; Master Coach.
 - Recognition of ‘pre-coaching’ roles played by parents, athletes and others.
 - Recognition of volunteer; part-time paid and full-time paid roles.
 - Recognition of four coaching domains: Children, Participation; Performer Development (talent); High Performance.

⁴ SASCOC. 2012. Long-Term Coach Development: the SA model for long-term coach development.
www.sascoc.co.za

- Training of coach developers who will support the education and on-going development of coaches.
 - Establishment of systems of Recognition of Prior Learning.
 - Linkage to the National Qualifications Framework and CATHSSETA.
 - Code of Ethics and Good Practice for Coaches.
 - Minimum standards licensing and registration on a phased basis.
- Roll-out will be through National Federations, working with stakeholders at district, provincial and national levels. Existing and new coaches will be provided with education, development and recognition of prior learning opportunities on a phased basis. The first step will be the training of coach developers in 2012 and 2013 and these will progressively work to provide education and support to coaches.
- CATHSSETA funding of SASCO for the development of coaching should be directed to⁵:



⁵ SASCOC. 2012. South African Coaching Framework. www.sascoc.co.za

- CATHSSETA should fund and facilitate the development of the SA coaching pathway:

The South African Coaching Pathway

