Designing and Delivering Distance Education:

Quality Criteria and Case Studies from South Africa

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An Overview of Quality Assurance in Distance Education in South Africa

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Introduction

Across the world, the quality of distance education varies enormously. On the one hand, we have an example of a distance education institution which in a particular country ranks amongst the leaders in all higher education for the quality of its teaching and learning. On the other hand, we have scurrilous distance education providers who take students' money, provide a miserable set of plagiarized notes, give no assignments, provide no learner support and, having wasted students' precious time, invite them to what is essentially a challenge examination. That there is such a wide range of practices in distance education is partly because distance education students find it so difficult to mobilize and complain, partly because the temptation to make money out of distance education programmes is great, and partly because the large numbers of students on many distance education programmes make it difficult to ensure that each student receives quality attention.

South Africa's recent history has shown both the potential and the difficulties of distance education. Robben Island became South Africa's first and arguably most successful learning centre during the long years in which many of South Africa's foremost leaders were imprisoned there. But the success of that learning centre was not a result of a conscious institutional decision to provide support for its learners. The learners themselves took the initiative, supported not by tutors from the provider institution, but by volunteers who acted as messengers between institution, families and prisoners, to ensure that they progressed from course to course. As students during the eighties were wont to say: 'Under odds we will study, under odds, we will pass!'

In the ten years since our freedom, various efforts have been made to improve the quality of distance education – not in order to undermine the initiative of students, but to ensure that students do not have to spend so much time overcoming the extrinsic barriers to success (like not receiving their materials or assignment tasks in time) and can concentrate on the intrinsic challenges of learning (such as mastering the complexities of calculus, or understanding constructivist approaches to learning).

As will be seen, the National Association of Distance Education Organizations of South Africa (NADEOSA) has played, and continues to play, an important role both in the development of awareness of quality in the South African distance education community. It also engages with quality assurance bodies specifically appointed for the quality assurance of distance education, particularly higher education.

This overview will look at the following key questions for quality assurance of distance education that we have grappled with in the last ten years:

- What do we understand by quality in distance education?
- Should quality assurance be externally controlled or internally driven?
- Should quality assurance processes for distance education be integrated into quality assurance processes for all education?
- Can policy makers actively prevent bad practice while stimulating innovation and excellence?

The importance of policy

Crucial to quality in distance education is a formal commitment to distance education by government. In South Africa we have been fortunate in this regard, especially as we moved into post apartheid South Africa.

The government-in-waiting's commitment to increasing access to education through the use of distance education methods was evident in the 1994 *Policy Framework for Education and Training* (ANC Education Department, Johannesburg):

> The development of a well-designed and quality distance education system based on the principles of open learning is the only feasible approach to meeting the needs of the vast numbers of our people who were systematically deprived of educational opportunity in the past, while at the same time providing opportunities for the youth coming up through the educational system at present. It will allow people access to education and training and the ability to determine where, when, what and how they want to learn (ANC, 1994:78).

Even at this early stage, however, there was concern that in order to do this successfully, distance education provision had to meet certain criteria, such as:

> well-designed courses, learner support, efficient administrative processes and appropriate organizational structures and evaluation procedures (ANC, 1994:77).

It was also clear that in order to ensure quality, which in turn would enable distance education methods to be used successfully for access, there had to be research into the state of distance education in the country. The ANC Education Department requested SAIDE to organize an International Commission to conduct a review and assessment of distance education in South Africa. In conducting its work, the International Commission, chaired by Prof. Gajaraj Dhanarajan, developed a set of criteria for what it termed 'well-functioning distance education'. It then reviewed South African distance education against these criteria, as well as against the priorities for education and training, which were evolving for a liberated post 1994 South Africa. Thus a new impetus was given to a process for clarifying and refining what is meant by quality distance education in the South African context.

The new South Africa's first White Paper on Education and Training of 1995 contributed to this refinement with an important distinction between open learning and distance education**.** Open learning, it was stated, was a set of principles that should apply to any educational programme:

> Open learning is an approach which combines the principles of learner-centredness, lifelong learning, flexibility of learning provision, the removal of barriers to access learning, the recognition for credit of prior learning experience, the provision of learner support, the construction of learning programmes in the expectation that learners can succeed, and the maintenance of rigorous quality assurance over the design of learning materials and support systems. South Africa is able to gain from world-wide experience over several decades in the development of innovative methods of education, including the use of guided self-study, and the appropriate use of a variety of media, which give practical expression to open learning principles (Department of Education, 1995).

As is reflected in this statement from the 1995 White Paper, the use of distance education methods can give 'practical expression to open learning principles'. Thus a set of underlying principles for distance education was established.

The new government also commissioned an investigation of higher education, which intensified the emphasis on quality as success. In order to be successful, institutions not only had to increase access; they also needed to ensure that completion and throughput rates on programmes were high enough to merit the cost of mounting the programme. A distinction began to be drawn between 'true' distance education, which provided sufficient learner support for learners to succeed in their studies, and 'correspondence education' in which there was no face-to-face element in the course design at all. The policy research of the National Commission on Higher Education culminated in the policy statements in the White Paper on the transformation of higher education.

This White Paper, while noting its concern about 'the efficiency, appropriateness and effectiveness of much current distance education provision' (Department of Education, 1997:27), reiterated its commitment to distance education by endorsing the notion that:

> distance education and on-campus resource-based learning have a crucial role to play in addressing the challenges of expanding access, diversifying the body of learners, being responsive to the needs of non-traditional students, for example, those already in employment or who need to earn in order to meet study costs, and enhancing quality within the context of limited resources (Department of Education, 1997:26).

The new South African government clearly anticipated that there would be, and indeed sought to encourage, massification of the higher education system. This, together with international trends towards lifelong learning, resulted in high expectations of the role of distance education in increasing access and cost-effectiveness.

Responding to its concerns about quality, it suggested:

> that there is much work to do to re-focus institutional missions, modernize courseware, improve student support, and to undertake essential efficiency reforms and cost-effective planning so that quality of provision and performance is improved (ibid: 27).

A framework for quality distance education

In 1996, the Department of Education, through its Directorate of Distance Education, Media, and Technological Services took the initiative in this ongoing work of improving the quality of distance education. The Department contracted a research team to assist with the development of a discussion document entitled *A Distance Education Quality Standards Framework for South Africa*.

The framework and approach to quality assurance contained in this document were based not only on an understanding of distance education provision in South Africa at the time but also on international experience. The mood of the progressive international literature at the time was best captured by the title of the quality assurance document of the Norwegian Association for Distance Education (NADE): *From External Control to Internal Quality Assurance* (Ljosa and Rekkedal, 1993). There were cautions about the role of standards – it was felt that they should encourage a process of continuous quality improvement, rather than merely prescribe a minimum. This could best be achieved through stimulating internal quality assurance processes in which institutions would evaluate themselves and set their own quality improvement agenda. Bureaucratic control according to set minimum standards, it was felt, would undermine the real goal, the internal drive to quality. In the South African document, this understanding was expressed as follows:

> Standards for education should not (as legislation tends to do) merely prescribe a minimum, but give scope for continuous quality improvement (Department of Education, 1996:51).

The second point that was highlighted was the importance of stakeholder consultation – not only to ensure that the standards developed are accurate and sufficiently comprehensive, but also that those who are going to use the standards have ownership of them and, in the process of contributing to them, develop a shared understanding of how they should be interpreted. As the relevant recommendation in the 1996 document states:

> Guidelines/standards should be developed through a consultative process, so that they are both understood and accepted as valid by the people who will use them (Department of Education, 1996:51).

Taking the last point into consideration, a consultation process was arranged with members of the newly formed National Association of Distance Education Organizations of South Africa (NADEOSA). This consultation process culminated in a revised set of standards in a draft policy statement entitled *Criteria for Quality Distance Education in South Africa*: *Draft Policy* (1998).

The framework for the 1996 and 1998 documents was drawn from a range of international sources. The format for the standards/criteria was adapted from that used by the Scottish Vocational Educational Council (SCOTVEC). There are thirteen standards/criteria representing the main institutional elements for distance education provision:

- Policy and planning;
- Learners;
- Programme development;
- Course design;
- Course materials;
- Assessment;
- Learner support;
- Human resource strategy;
- Management and administration;
- Collaboration;
- Quality assurance;
- Marketing;
- Results.

Under each of the headings there is an overall standard/criterion, followed by numbered elements which tease out the implications of adherence to the broad standard. The thirteen standards/criteria provide an overview of what is meant by quality distance education, and, if further detail is required, the reader can engage with the specific elements.

The intention was originally to publish the 1998 *Quality Criteria* as a separate policy document for distance education. But many people at the time thought when they read the document that the criteria actually applied to all educational provision, rather than merely to distance education, and that the standards of excellence in distance education should inform standards required for all educational provision. So the policy document was not published.

The impact of the 1996 Quality Standards Framework

However, both the 1996 *Quality Standards Framework* and the 1998 *Quality Criteria* policy document have had an impact. They have been used both inside South Africa and internationally. Namibia, for example, is developing its approach to quality assurance for distance education based on the 1998 Criteria. In 2001, the Asian Association of Open Universities in association with the Commonwealth of Learning brought out a document entitled, *A Framework for Creating a Quality Assurance Culture in a Dedicated Distance Education Institution*, in which it acknowledged extensive use of the South African Quality Standards Framework document. Within South Africa, a variety of institutions have taken up the challenge of internal self-evaluation using the 1998 *Quality Criteria*.

However, even though there has been a growth in understanding and practice of quality distance education by a number of providers, at the same time much that is of poor quality persists. What is more alarming is that it is usually in programmes with large numbers, or in institutions whose distance education provision is growing steadily, that this poor quality persists. The financial gains from large scale provision, and the complexity of providing adequate support to large numbers of students together conspire to make providers resist change.

Some examples of this bad practice in South Africa include:

- In 2003, in an undergraduate course at first year level with an enrolment of over 10 000 learners, the only formative assessment was an optional multiple choice assignment. Student support in the form of contact sessions reached less than 10% of the students. It is estimated that the course cost R181 per student. On a conservative estimate the course made profits of R10 million a year but this money was not used to improve the assessment and learner support of the students on the course.
- In 2003, in a teacher upgrading course with 705 enrolments where the provider was receiving bursaries of R5000 per teacher, less than three hours of learner support was provided per module (about 3% of the notional learning hours of the module), and often this support consisted merely of showing a video of a lecture to the students.

The existence of the *Quality Standards Framework* which sets out very explicit requirements for both learner support and assessment has obviously had no effect on these courses/programmes.

There are also, despite such forums as NADEOSA , widely differing understandings of what constitutes quality distance teaching and learning. Some providers have improved assessment and learner support, but when the course materials are evaluated, the teaching and learning method is clearly authoritarian transmission mode without any attempt to develop concepts step-by-step based on learners' experience.

There is a need for some measure of external regulation, and a stepped-up effort to achieve an understanding of what constitutes quality distance education that goes beyond acceptance of a common set of criteria. Under the South African Qualifications Authority and the

Council on Higher Education, external bodies have been created and are beginning to exert the required pressure for change. The remainder of this introduction explores the current thinking about how the quality of distance education can be controlled and improved. Although current thinking about strategies for quality assurance of distance education relates primarily to higher education, the criteria and minimum targets contained in this publication relate equally to general and further education.

Current thinking on quality assurance of distance education in higher education in South Africa

Should there be separate quality criteria for distance education?

An important question to ask about the quality assurance of distance education is whether or not it should be considered separately from the quality assurance of all education.

Current thinking on the question about whether or not to integrate quality assurance processes for distance education into those for all education is that, as far as possible, distance education concerns should be infused into criteria for the audit of all institutions and accreditation of all programmes. There is considerable overlap between criteria for quality distance education, and generic criteria for all educational programmes, and there is little point in proliferating criteria unnecessarily.

As a result, the Higher Education Quality Committee has consulted the distance education community and infused distance education concerns into both its *Criteria for Institutional Audit* (HEQC, 2004), and *Criteria for Programme Accreditation* (HEQC, 2004c).

For example, Criterion Eight of the *Criteria for Institutional Audit* (Higher Education Quality Committee, 2004:11) reads:

> Clear and efficient systems and procedures are in place for the design and approval of new programmes, courses and modules. The requirements are consistently applied and regularly monitored.

Distance education additions are as follows (Higher Education Quality Committee, 2004: 12):

> (ix) In the case of distance learning programmes, tested systems, technologies and support arrangements for materials development and delivery for distance learning.

In the case of the programme accreditation criteria, sometimes a minimum standard clearly appropriate particularly to distance education has been included in an obvious way. See Criterion 4 (vii) (Higher Education Quality Committee, 2004c:11):

> For distance learning programmes, sufficient administrative and technical staff is employed to handle the specialized tasks of registry, dispatch, management of assignments, record-keeping, and other issues in relation to student needs.

In other cases, the infusion of distance education concerns is less obvious. For example, the following was added to one of the minimum standards in Criterion 3 (Higher Education Quality Committee, 2004c:10):

> (ii) The majority of full-time academic staff has two or more years of teaching experience in a recognised higher education institution, and in areas pertinent to the programme. In the case of professional programmes, a sufficient number of academic staff members also have relevant professional experience. **Qualified and experienced academic staff design the learning programme, although junior or part-time tutors may act as facilitators of learning.** [our emphasis]

The last sentence of this minimum standard is important in the case of distance education programmes in which typically academics at the central institution design curriculum and materials, but employ part-time tutors to assist students in local learning centres close to where they live or work. Although critical for distance education, the standard is also relevant to tutoring arrangements at face-to-face institutions.

However, infusion of distance education concerns into criteria for the accreditation of all programmes does not imply that there is no distinction between distance and face-to-face education.

In the late 90s, the thinking was that it was counter-productive to deal with distance education separately from the rest of education. There was at the time a feeling that the distinction between face-to-face and distance education was blurring, and that there would, in due course, be a convergence. This opinion was strengthened by the fact that nearly all the criteria for distance provision could equally be applied to face-to-face provision. In addition, distance providers were concerned that for distance education to be dealt with separately would mean being regarded as inferior, and distance programmes should compete equally with all educational programmes.

However, it is clear from recent research (Council on Higher Education, 2004) that in South Africa at least, while the distinction may be blurring, distance and face-to-face education are not converging. There is still a distinct role for distance education and the requirements for successful delivery need to be spelt out so that distance education can fulfil this role properly. The NADEOSA Quality Criteria in Section Two of this book are an attempt to do this. For example, high quality learning materials are critical for successful distance delivery, because, in distance education it is the materials that are the main teacher – rather than the lecturer standing in front of a class or managing a tutorial. Hence the NADEOSA Quality Criteria contain 18 elements that describe what quality materials are. These 18 elements cover both print-based and web-based materials, and deal with issues as wide-ranging as accessibility, coherence and approach to teaching and learning (See Quality Criterion no 5, elements 5.5.1 to 5.5.11 and 5.6.1 to 5.6.7).

However, criteria only have life and power inasmuch as they are used and interpreted. In addition, quality is not fixed and static but develops with changes in educational thinking and practices as well as with advances in technology. The rapid expansion of electronic learning has been the most noticeable change in the last decade.

For these reasons, the development of criteria has to be an ongoing consultative process, in which those most affected engage and contribute. A consultative process was followed in the revision of the 1998 Criteria for Quality Distance Education in South Africa: the criteria already established for distance education were revised, as well as expanded to include criteria for the use of electronic learning, leading to the NADEOSA Quality Criteria for Distance Education in Section Two of this book. They are a description of what constitutes quality as understood by the distance education community in South Africa at this point in our history.

Although only the HEQC's criteria carry legal force, there is a role for 'additional benchmarks' that are used in institutional processes of self-evaluation. The HEQC position with regard to use of additional criteria is that[1] :

> The HEQC will require providers of distance education programmes to conduct periodic self-evaluation exercises to evaluate their effectiveness against the HEQC's criteria **as well as additional benchmarks that they wish to employ**. This will constitute part of the evidence when institutions apply for self-accreditation [our emphasis].

Provider readiness to offer programmes using distance education methods

In the last ten years there has been a large increase in the number of distance education programmes offered by predominantly face-to-face providers. This is for a variety of reasons. Sometimes the shift to distance is not deliberate. When providers use e-learning in contact programmes, they realize that students do not actually have to be with a lecturer to be learning, and gradually they extend their programme to more and more students who seldom if ever are on campus. In other cases, the decision to offer programmes using distance education is deliberate – providers realize that they can increase access to a more diverse group of students in cost-effective ways, and they shift to distance. Whether deliberate or not, often the provider either does not know or is not willing to develop the systems necessary to deliver distance education effectively. For example, in large scale distance programmes, management of assignments is a major task. It is not a question of lecturers taking in assignments when they see the students one week, and returning the assignments the next week when they see the students again. Simply opening assignments received by post is a time-consuming logistical operation, let alone arranging for them to be marked by a range of tutors, moderated, and returned to students before the next assignment is due.

Face-to-face providers often require assistance with delivering programmes using distance methods. There are therefore plans to prepare a guide on provider readiness to offer programmes using distance education methods and use this in workshops for traditionally face-to-face institutions that wish to offer programmes using distance education methods.

In addition, however, institutional auditors as well as programme evaluators need to be aware of what to look for when traditionally face-to-face institutions offer programmes

[1] A quotation from the comment on the first proofs of this book from the HEQC, 1 February 2005

using distance education methods. Distance education concerns are infused into the HEQC's *Criteria for Programme Accreditation*, which all higher education programmes, whether face-to-face or distance, are required to meet. But because they are infused, the particular needs of distance education are not immediately apparent. A summary of separate distance education issues may therefore be helpful in judging provider readiness to offer programmes using distance education methods. We suggest the following summary as a starting point.

Table 1: Issues to consider in judging provider readiness to offer distance education programmes

Planning development and review

The particular characteristics and needs of distance education are taken into account in the planning, development and review of such programmes.

- Programme planning and budgeting are aligned, with potential income clearly identified, and appropriate levels of resources are set aside for course design and development, for administrative systems and for supporting learners.
- The design of the programme ensures explicit and reasoned coherence between, on the one hand, the aims and intended learning outcomes, and, on the other, the strategies for teaching at a distance, the scope of the learning materials and the modes and criteria of assessment.
- The design of the programme provides a learning opportunity which gives to students a fair and reasonable chance of achieving the exit level outcomes required for successful completion.
- Existing programmes are monitored, reviewed and subject to re-approval regularly, in particular to ensure that the content of all learning materials remains current and relevant and that learning materials, teaching strategies and forms of assessment are enhanced in the light of findings from feedback.

Staffing

The particular demands of distance education are taken into account in the staffing arrangements of programmes.

- Course/module designers and developers are suitably qualified (at least 2 levels above the course/module level) and trained or guided in materials development.
- Determination of staff workload makes provision for all aspects of course/module development and delivery, especially for materials development and assessment.
- Arrangements are in place for proper recruitment, training and monitoring of the necessary part-time and contract staff.
- Arrangements are in place for academic and support staff to be trained to use any administrative systems and/or technologies used in the programme.

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Programme implementation

The institution has the necessary systems and guidelines in place to implement programmes at a distance.

- Institutional standards for ethical marketing are in place and monitored.
- Processes exist for communicating full and clear information about the nature and expectations of the programme of study so that informed decisions can be made by students.
- Tested systems for administering and teaching students at a distance are in place, covering general communication, materials development and delivery, learner support and feedback on assessment.
- Systems are in place to identify inactive students and support them timeously.
- Technologies used are tested and reliable, and staff and students are versed in their application.
- Systems are in place to monitor, review and provide the feedback referred to in Criterion 1 above.

Assessment

Policies and procedures for assessment take into account the particular contexts of distance education students.

- The policy requires that formative assessment with individual timeous student feedback is an integral part of the programme and that appropriate systems and procedures are in place to make this viable.
- Where tutors are used to provide formative assessment, proper quality assurance is conducted by the provider.
- A provider is able to demonstrate publicly that summative assessment procedures used for programmes studied at a distance are appropriate for the mode of study, for the circumstances in which the programmes are studied and for the nature of the assessment being undertaken.

National reviews of existing programmes

Provider readiness to offer distance education programmes is about new programmes – or existing face-to-face programmes that institutions want to offer using distance education methods. But there also needs to be a strategy for the quality assurance of existing programmes. However, it is not possible from a financial and human resources point of view to examine all existing distance programmes even within the next ten years. The Higher Education Quality Committee has therefore decided to undertake national reviews leading to re-accreditation in selected programme and qualification areas. The first such review was the MBA review in 2003/4 and the second is the National Review of Professional and Academic Programmes in Education planned for 2005 to 2007.

In the selection of such programme areas, the extent of large scale distance provision in that programme area needs to be taken into account for two reasons: the numbers of students affected, and the fact that in large scale distance education the temptation to maximize economies of scale at the expense of quality is great. The HEQC (Higher Education Quality Committee, 2004a: 4) notes that:

> if it reviewed only 24 courses with enrolments of over 3000 in 2001, it could reach nearly one third of all UNISA's course enrolments. Similarly, by reviewing 14 distance education teacher education programmes at predominantly face-to-face institutions, the HEQC could reach nearly 71% of distance education full-time equivalent students at such institutions.

The national reviews will use the HEQC's programme accreditation criteria as the basis for developing subject-specific criteria for the particular field and proramme to be reviewed. In the National Review of Professional and Academic Programmes in Education, there is also a task team led by UNISA which is developing a set of criteria particular to distance teacher education to be used together with the generic HEQC criteria.

Conclusion

It is critically important to support all quality initiatives, both by advocacy and by capacity development for quality improvement. The intention is that, in partnership with the distance education community through such organizations as NADEOSA, the Higher Education Quality Committee will provide institutional capacity development through workshops on its criteria, guides for good practice and other relevant issues.

This publication is an element of this co-operative effort.

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2 Section **TWO**

criteria

The NADEOSA Quality Criteria for Distance Education in South Africa

Introduction

The quality criteria in this section have their origin in documents produced in 1996 and 1998, as was pointed out in Section One. Although the initial research was done for the Department of Education, the criteria have been revised twice since then by NADEOSA in a stakeholder process involving the distance education community. It is for this reason that they are now being published as *The NADEOSA Quality Criteria for Distance Education in South Africa*. The thirteen criteria have been retained from the original (1.Policy and Planning; 2.Learners; 3.Programme Development; 4.Course Design; 5.Course Materials; 6.Assessment; 7.Learner Support; 8.Human Resource Strategy; 9.Management and Administration; 10.Collaborative Relationships; 11.Quality Assurance; 12.Information Dissemination; and 13.Results). The majority of the individual elements of the criteria have also been retained, but the phrasing and ordering of these elements has been revised, and there are a number of additional elements.

There are a number of difficulties with criteria. One difficulty is that they can never be comprehensive enough. Even if a decision is reached to go with a fixed set of criteria, the elements of each of the criteria can be elaborated as new perspectives on practice emerge through research, evaluation, or changes in technology. In the current set of NADEOSA Quality Criteria, there are thirteen criteria with 212 individual elements. Doubtless, if more minds were applied to the process, a further 100 or so could be added. A second difficulty is that stating the criteria in detail does not mean that there is a shared understanding of how they are to guide practice. Strategies need to be found to interrogate and interpret the criteria.

This publication proposes two such strategies. Firstly, in an Addendum to the NADEOSA Quality Criteria in this section, criteria have been selected that reflect current concerns in distance education practice in South Africa. This is an attempt to prioritize, and to give evaluators a set of elements to start with. In addition, in each case, a description of the concern provides the reason for the selection. At the same time, it is hoped that the description of the concern will help evaluators interpret the selected elements of the criteria and understand why they have been included. The areas of concern are drawn from evaluation and research in distance education conducted by SAIDE over the last ten years, and discussed at two successive NADEOSA conferences.

The second strategy is provided in the case studies in Section Three of this publication. Sets of criteria fragment practice, often distorting it in the process. Furthermore, however well-intentioned, criteria can be reductionist and stifle good practice, rather than encouraging it. In Section Three, the practice speaks for itself through the case studies. The case studies illustrate aspects of the criteria, and in some instances, go beyond them.

A note on terminology

The distinction between programme development, course design and course materials, has been adopted from one of the source documents for these criteria, the Department of Education's draft policy document, *Criteria for Quality Distance Education in South Africa* (1998:6):

> *Programme development* concerns itself with the curriculum in macro planning of groups of courses, how they combine to realise a general educational goal or set of outcomes (such as a degree, diploma, or certificate), as well as the procedures governing access and articulation with other programmes ...
>
> *Course design* concerns itself with planning the content, pedagogy and assessment in individual courses. …
>
> *Course materials* are the concrete products that are results of programme development and course design activities. They are learning materials in any medium or combination of media.

1. Policy and Planning

The educational provider has a clear sense of purpose and direction, which is informed by national priorities as well as by the quality demands of cost-effective educational provision. There is both a rationale and relevant systems for the use of distance education methods to achieve the purpose of the programme for the target learners.

Elements of the Criterion

1.1 The mission statement of the educational provider sets out clearly and unambiguously goals and principles which are fit for its local, national and international context and which adequately provide for transformational issues.

1.2 Policy statements, strategic plans, slogans or mottoes are aligned with the mission, goals and principles of the educational provider.

1.3 There are policy statements and evidence of implementation of policies on:

- programme development;
- course design;
- course materials development;
- services to and responsibilities of learners;
- learner support, including tutors and mentors;
- assessment;
- recognition of prior learning and current competence;
- where appropriate, integration of workplace learning into the theoretical curriculum (co-operative education);
- language of teaching and learning, as well as of internal and public communication;
- human resource strategy;
- management and administration;
- finances, fees and payment regulations;
- quality assurance and review;
- evaluation and research;
- admissions and an enrolment management strategy to facilitate access for success;
- marketing;
- accreditation;
- collaboration;
- export of programmes; and
- the use of information and communication technology (ICT).

1.4 The provider or programme management team can provide a rationale for the use of distance education or electronic learning methods for the delivery of the programme/course to the intended target learners.

1.5 Prior to offering programmes of study by distance education, the provider has explicitly designed systems for administering and teaching learners at a distance and has planned for contingencies in order to meet its stated aims in terms of academic quality and standards.

1.6 There is a recognition that the use of electronic learning methods is likely to require greater levels of collaboration, both nationally and internationally, and therefore the provider has considered:

- selection of an appropriate technical platform for design and delivery;
- installation of technical infrastructure that is compatible with present or possible future partners;
- a process for the development and/or implementation of shared standards for online content across partners.

1.7 There is a published statement of the educational provider's commitment to learners and how this commitment will be measured.

1.8 Implementation plans are realistic, both in terms of learning and teaching goals and in terms of financial sustainability, and designed to enable targets to be met.

1.9 Policy statements and methods of implementing them are recorded, readily available, and fully understood by members of staff.

1.10 There are mechanisms to support and monitor staff in the implementation of these policies.

1.11 There are monitoring procedures to ensure that all policies are implemented, evaluated, and amended as and when necessary.

1.12 Equal opportunities are ensured for all learners, staff and other clients.

2. Learners

There is up-to-date detailed information about past, present and potential learners. This is used to inform policy and planning of programme development, course design and materials development, learner support, and other relevant aspects of educational provision.

Elements of the Criterion

2.1 The provider has developed a learner profile that identifies the characteristics and situation of distance education learners. This profile should include:

- demographic factors - for example, age, gender, geographic location, and occupation/employment;
- language profiles - including language ability in the main language of teaching and learning, language background, and multilingual language ability;
- motivation for learning - for example, for career purposes or personal interest;
- educational background/learning experience - for example, prior learning and experience, prior qualifications, experience of distance learning, learning skills and styles, and language background;
- special needs - for example, barriers to learning, physical disabilities or learning difficulties;
- resource factors - for example, financial resources, place of learning, times available for learning, access to electricity, access to media and technologies;
- experience and knowledge of technology; and
- success rates of past and present learners.

2.2 The management of information system provides for the tracking of learner performance (for example, in assignments, examinations, or even attendance at contact sessions) and can be used to identify at risk learners and those learners who, though registered, are inactive. It can also be used to determine completion and throughput rates.

2.3 Research into learners and their needs is a high priority and is used to inform all aspects of policy.

2.4 Learner information is used to design programmes, courses, materials, learner support, and counselling services that are flexible and learner-centred.

2.5 Mechanisms are in place for promoting access to learners from marginalized groups, inter alia, through the provision of academic development programmes.

2.6 Tutors have access to information about their learners and contribute to the collection of such information.

2.7 Systems exist to maintain the confidentiality of information about learners.

2.8 Special needs (for example, physical disability) are considered in the design of course materials, assessment arrangements, and communication with tutors.

2.9 The educational provider is aware of and caters for learners with learning difficulties.

3. Programme Development

Programmes are flexible and designed with national needs as well as the needs of prospective learners and employers in mind; their form and structure encourage access and are responsive to changing environments; learning and assessment methods are appropriate to the purpose and outcomes of the programmes.

Elements of the Criterion

Programme planning

3.1 The programme is developed in terms of a needs analysis based on an audit of existing courses and programmes, market research, liaison (where appropriate) with industry and professions, national and regional priorities, and the needs of the learners.

3.2 The programme is part of the provider's mission and plans.

3.3 For each programme, there is a publicly accessible description of:

- the qualification to which the programme leads;
- the admission requirements;
- purpose and outcomes;
- target learners;
- teaching and learning strategies (including, where appropriate, workplace learning);
- features of the learning environment and resources;
- assessment strategy;
- courses or modules in the programme; and
- where appropriate, accreditation arrangements and articulation with other programmes offered by the educational provider, in the workplace or other educational providers.

3.4 There is a careful analysis of the most appropriate technologies to support:

- the provision of course materials to learners;
- other teaching and learning processes; and
- management and administration of the programme.

3.5 The selection of technologies is based on the needs, resources and capabilities of the learners and the provider, and the purposes of the programmes on offer.

3.6 Wherever possible, courses are used in more than one programme.

3.7 Human resource planning is an integral part of programme development.

3.8 Programme planning and budgeting are aligned, with potential income clearly identified, and appropriate levels of resource set aside for course design and development, for administrative systems and for supporting learners.

Programme approval

3.9 Procedures for the approval of programmes meet the requirements of the relevant bodies, but are not cumbersome and allow for and encourage innovation and flexibility.

3.10 Where programmes are exported, procedures are established for reviewing legal programme approval requirements and also requirements under local law in respect of relevant matters including consumer protection, copyright, employment, packaging and postal despatch.

Programme curriculum

3.11 The outcomes, content, teaching and learning strategies and assessment methods in the programme are aligned and appropriate for the level and purpose of the programme.

3.12 In the case of professional and vocational programmes, work-based learning forms an integral part of the curriculum, and, where appropriate, placement in a work-based environment is an essential component of the programme.

3.13 The various courses of the programme are integrated.

3.14 To facilitate conceptual pathways through the programme, due attention is paid to the appropriate sequencing of modules/courses in a programme, and to the management of options.

Admissions and learner support

3.15 To facilitate access, entry requirements for the programme are as open as possible, and include recognition of prior learning and experience.

3.16 Where entry is open, care is taken to provide sufficient academic support to learners who may be under-prepared. This may be by the provision of access or bridging courses, additional units within existing courses, or increased face-to-face support.

3.17 Numbers of learners enrolled in a programme do not exceed the capacity of the staff and the administrative infrastructure to provide for learner support and assessment needs in terms of the criteria in this document.

3.18 Care is taken that learners admitted to programmes which require the use of technology have sufficient access to that technology to make it possible for them to succeed in the programme.

Accreditation, articulation and flexibility

3.19 Wherever possible, programmes allow for flexible exit points.

3.20 Learners are made aware of credit requirements of the programme and the possibilities for transfer to other programmes offered by the same or other educational providers.

3.21 Where appropriate, assessment is linked to accreditation and fulfils the requirements of external quality assurance bodies.

Quality assurance

3.22 Clear and effective procedures are in place (including internal and external peer review) to monitor and evaluate programmes on a regular basis.

3.23 Review findings are disseminated appropriately and used for staff development, curriculum improvement and increasing learner access.

3.24 Should a decision be taken to discontinue the programme, due attention is given to meeting the provider's commitments to the learners registered on the programme.

4. Course Design

The course curriculum is well-researched, with aims and learning outcomes appropriate to the level of study; content, teaching and learning and assessment methods facilitate the achievement of the aims and learning outcomes; there is an identified process of development and evaluation of courses.

Elements of the Criterion

Course planning

4.1 The course is designed with national needs as well as the needs of prospective learners and employers in mind.

4.2 The elements of the course (see 4.3 and 4.4 below) and the relationships between them are consciously planned.

4.3 For each course, there is a publicly accessible and learner-friendly description of the aims and learning outcomes; entry-level skills, knowledge and experience; credit rating and/or notional hours of learning; target learners; teaching and learning strategies; content outline; items in the learning package (including elements such as study guides, textbooks, tutorial letters, audiotapes and videotapes); assessment strategy; and a year plan containing key dates for learners.

4.4 Choice of media and technology is justified in the light of the aims of the course, required learning outcomes, learner needs, capacity to access and use the technologies, the physical features of the teaching sites and available facilities and services.

4.5 There is a stated language policy for the course which is based on the national language policy, language profiles of learners, career context and curriculum. The policy is implemented in course materials, assessment and learner support.

4.6 The list of courses offered by an educational provider is limited to a number that allows for quality investment in course design and development in the context of budgetary limitations. (Quality is defined by the criteria in this document).

Course curriculum

4.7 The amount and complexity of work required to complete the course merits the credits which it has been allocated. This also applies to the assessment for recognition of prior learning and experience.

4.8 Where a course is imported or exported, account is taken of the needs of local contexts, and, where necessary, the course is adapted accordingly (for example, by the inclusion of local case studies or a glossary of terms).

4.9 Content, teaching and learning strategies and assessment are carefully structured to facilitate the achievement of the learning outcomes.

4.10 Various forms of learner support are built into the design of the course.

4.11 Teaching, learning and assessment activities encourage critical thinking and independent learning.

4.12 The teaching and learning strategies of the course acknowledge learners' existing knowledge and experience, and provide opportunities for guided integration of new knowledge.

4.13 Where appropriate, experiential learning opportunities are designed into the course. There are suitable methods of recording and assessing this (such as portfolios, logbooks, project reports, learner interviews, or reports from the mentor).

Quality assurance

4.14 The educational provider requires relevant competence of authors, consultants, and others that are brought into the course design and development process.

4.15 The educational provider gives authors, consultants, and others involved in the course design and development process necessary guidance and training regarding aspects of distance education in order to assure quality in their work.

4.16 An appropriate infrastructure exists within the educational provider to administer the range of elements of the course efficiently.

4.17 There is a timetable for the regular revision and updating of courses.

5. Course Materials

The content, assessment, and teaching and learning approaches in the course materials support the aims and learning outcomes; the materials are accessibly presented; they teach in a coherent way that engages the learners; there is an identified process of development and evaluation of course materials.

Elements of the Criterion

Materials development planning

5.1 The development of course material is based on a project plan which describes, for example, finances and other resources, the delegation of responsibility among those involved, and an adequate time schedule for the work.

5.2 If existing course material is used for a particular course, its suitability is evaluated in terms of required learning outcomes, the appropriateness of the teaching and learning approach, and its relevance for the target learners.

5.3 If existing course material is used for a particular course, there is proper acknowledgement of the source of all quotations and no breach of local or international copyright laws.

5.4 While the provider holds copyright for course materials developed by employed or contracted staff, the individual author's intellectual property rights are also respected.

Quality course materials

5.5 Materials are developed and reviewed in terms of the following criteria:

5.5.1 There are clearly laid out aims and learning outcomes, and an explicit indication of study time (notional study hours per section of the material) which allow learners to adopt sensible study plans.

5.5.2 The content and teaching approach support learners in achieving the learning outcomes.

5.5.3 Learner-friendly introductions, linking and summarizing passages motivate the learners and provide coherence to the materials.

5.5.4 The content of the course is accurate, up-to-date, relevant to aims and outcomes, free of discrimination, and reflects awareness of the multilingual and multicultural reality of South African society.

5.5.5 The language level of the materials is appropriate for the target learners and the materials assist learners with the particular difficulties that learning-through-reading and learning at a distance require.

5.5.6 Care is taken to understand the contexts in which learners live and work, as well as their prior knowledge and experience. This knowledge is used in the design of the materials.

5.5.7 Active learning and teaching approaches are used to engage learners intellectually and practically, and cater for individual needs.

5.5.8 Content is presented in the form of an unfolding argument, rather than discrete bits of information that have no obvious connection.

5.5.9 The various elements of the course materials and different media are integrated, and the integration is clearly sign-posted.

5.5.10 The course materials are designed in an accessible way. Access devices (such as contents pages, headings), graphic presentation of information, and layout facilitate use by the target learners.

5.5.11 The overall technical quality of the materials facilitates learner use.

5.6 In web-based/online courses, the following additional criteria apply:

5.6.1 The service is speedy and reliable: it is easy to connect to the site, and the site loads quickly with a minimum number of crashed sessions.

5.6.2 Pages and text are designed for consistency, readability and attractiveness.

5.6.3 The site is easily navigable, has a sitemap with clearly marked links, and the different elements integrate seamlessly with each other.

5.6.4 The site is up-to-date, with minimum technical faults, and continuously under development.

5.6.5 The site clearly displays its institutional links and acknowledges sources of material used.

5.6.6 Support in the use of various functions on the site is provided both in the site itself and from external technical assistance.

5.6.7 The site encourages interactions with other learners as well as with the tutor/mentor.

Quality assurance

5.7 The materials development plan includes provision for evaluation during the developmental process in the form of critical commenting, developmental testing, or piloting.

5.8 The materials are periodically reviewed in the light of ongoing feedback from learners and tutors and advances in knowledge and research.

6. Assessment

Assessment is an essential feature of the teaching and learning process, is properly managed, and meets the requirements of accreditation bodies and employers.

Elements of the Criterion

Assessment design

6.1 Assessment is recognized as a key motivator of learning and an integral part of the teaching and learning process. It is used to inform teaching practice and improve the curriculum.

6.2 Assessment information (including learning outcomes, assessment criteria as well as assessment procedures and dates) is provided in all courses, modules or topics.

6.3 The level of challenge of the assessment in a programme is appropriate for the level of the qualification to which it leads.

6.4 There is a range of formative and summative assessment tasks and methods which ensure that all learning outcomes are validly assessed.

6.5 Assessment, especially of experiential or workplace learning, is designed in terms of predetermined outcomes and criteria.

6.6 A range of parties is involved in assessment of learners: for example, there might be self-assessment, peer assessment, tutor assessment and/or assessment by workplace mentors.

6.7 For each programme, there is at least one integrated assessment procedure which is a valid test of the key purposes of the programme.

6.8 There are effective procedures for recognizing prior learning and for assessing current competence.

6.9 In distance education delivery between countries, care is taken that the assessment activities are designed and administered in ways that do not disadvantage learners in a range of contexts.

Quality assurance of assessment

6.10 Staff involved in assessment are assessment-literate and competent to assess learning at the level required by the programme.

6.11 Where part-time tutors are involved in assessment, they are trained for the task, and academic staff monitor and moderate both formative and summative assessment to promote reliability and fairness.

6.12 The assessment strategy includes systems for internal and external moderation that meet the requirements of the accreditation body.

Assessment management

6.13 Marking procedures for both formative and summative assessment promote consistency and accuracy of marking, grading, and provision of feedback to learners.

6.14 There are clear procedures to receive, record, process, and turn around assignments within a timeframe that allows learners to benefit from formative feedback prior to the submission of further assessment tasks.

6.15 An appeal system is in place for when learners have a complaint about the fairness of the assessment.

Security

6.16 Arrangements for locally-administered summative assessments are secure.

6.17 Particularly when electronic methods are used, there are adequate systems to ensure security of personal information and security of identity during assessment processes. However, the security solutions are flexible enough to accommodate different programmes and styles of teaching and learning.

6.18 Documented procedures assure that security of personal information is protected in the conduct of assessments and evaluations and in the dissemination of results.

6.19 Assessment results are recorded securely and reliably and are available to all stakeholders including learners (as is appropriate).

6.20 Clear and efficient arrangements are in place to ensure that the integrity of certification processes is not compromised.

7. Learner Support

Learners are provided with a range of opportunities for real two-way communication through the use of various forms of technology for tutoring at a distance, contact tutoring, assignment tutoring, mentoring where appropriate, counselling (both remote and face-to-face), and the stimulation of peer support structures. The need of learners for physical facilities and study resources and participation in decision-making is also taken into account.

Elements of the Criterion

Academic support

7.1 Learners are encouraged to create and participate in 'communities of learning' in which the individual learner thinks and solves problems with others engaged in similar tasks. This is facilitated through a range of learner support mechanisms – peer support sessions, tutorials/contact sessions, teaching on assignments, support in the workplace (mentoring), email and Internet communications, for example.

7.2 Academic support is built into the design of the course materials.

7.3 Learners are carefully oriented to the teaching and learning methods on the programme, particularly if electronic learning methods are used.

7.4 Where appropriate, the development of competence in the use of information and communication technologies is built into the learning outcomes of the programme.

7.5 In selection of venues and times for contact sessions, travel time and expense for learners are considered. Care is taken to place suitable sites of learning close to where learners live/work.

7.6 Tutors are selected and trained for their crucial role in encouraging active engagement of each learner in the course/programme through:

- establishing and maintaining a supportive relationship with each learner in their group;
- mediating learning from the course materials;
- teaching on assignments by give constructive feedback.

7.7 Tutor training places particular emphasis on equipping tutors to analyze and assist learners with language and learning difficulties.

7.8 The tutor/learner ratio is sufficiently small to enable tutors to know their learners as individuals, be able to support them in their studies and monitor their progress.

7.9 There are sufficient contact sessions to ensure that the learners are able to achieve the outcomes of the course.

7.10 Contact sessions are integrated into the course design, rather than being an add-on extra.

7.11 The teaching and learning activities at contact sessions acknowledge learners' existing knowledge and experience, and provide opportunities for guided integration of the new knowledge and skills as contained in the course materials.

7.12 There are opportunities for individual academic support for learners either by telephone, by appointment, or online.

Counselling support

7.13 Learners have access to counselling for personal difficulties/advice related to their study before and during their course or programme, as well as after its completion.

Administrative support

7.14 Administrative staff are trained to be helpful, clear and consultative in the way they relate to and make arrangements for learners.

7.15 The obligations and responsibilities of learners and the educational provider are made clear at registration. It is clear what resources and equipment the provider will supply, and what the learner will have to supply personally.

7.16 Where possible, arrangements are made to meet learners' needs for physical facilities for study, tutorial, and resource space.

7.17 Learners have access to facilities (for example, libraries) and equipment that are necessary for their successful learning.

7.18 Learners are provided with technical support for educational technology hardware, software, and delivery system required in a programme.

Learning centres as part of learner support

7.19 Both academic and administrative functions of learning centres are taken care of in the way that learning centres are managed.

7.20 Learning centres, to the extent that they become fixed structures, and particularly fixed structures with technological equipment, are accessible to the broader community, rather than merely to a provider offering a formal programme.

Monitoring/quality assurance

7.21 Before each critical phase of a course/programme (for example, before the first assignment, contact session, examination), each learner is contacted and encouraged to participate.

7.22 Learner performance is monitored and learners at risk identified. Timeous educational intervention is provided for such learners.

7.23 Performance of tutors and attendance of both tutors and learners at contact sessions is monitored regularly. The work of mentors in supporting and assessing learners in the workplace is also monitored by the provider. Monitoring data is analysed and acted upon.

7.24 Feedback is sought from tutors/mentors as well as from learners for the review of courses and programmes.

7.25 Learner structures, such as learner/student representative councils and faculty associations, are established, recognized and empowered to represent learners on structures of institutional governance.

8. Human Resource Strategy

The staff structure as well as the experience, qualifications, responsibilities and job descriptions of staff are appropriate for the education and training services provided; staff development programmes equip staff to perform their roles and tasks effectively.

Elements of the Criterion

Staff complement

8.1 Distance education teaching tasks are distributed among separate functional responsibilities; for example, course design, instructional design/course materials development, electronic media use, editing, tutorial support for learners, monitoring of tutors, counselling, assessment, and management of the distance education learning system.

8.2 The main responsibility for programme development, course design and monitoring of programme delivery is that of qualified academic staff.

8.3 Course design/development staff are suitably qualified (at least two levels above the level of the course).

8.4 The number of full-time academic staff in the educational provider is as small as possible, but the number of tutors (mostly employed on a part-time basis) is sufficient to provide for individual needs of learners.

8.5 The educational provider employs sufficient administrative and technical staff to handle specialized tasks of registry, despatch, management of assignments, administrative support, as well as technical IT support to learners and staff.

Staff development

8.6 Staff are trained, monitored, and supported for the specialized roles and tasks they perform, including design, management and delivery of electronically-offered programmes.

8.7 Staff engaged in online tutoring and moderation of online discussions are qualified and trained for the intensive engagement and direction which is required.

8.8 Staff development is regarded as the responsibility not only of the individual, but also of the particular department and educational provider in which the individual works.

8.9 There are systems for the dissemination of newly acquired skills and information.

Workload

8.10 Academic workload is measured in terms of the following:

- course design;
- preparation of course materials;
- piloting of courses;
- devising and participating in assessment strategies;
- tutoring, particularly online tutoring;
- supervision of tutors/markers/other staff;
- management of courses;
- monitoring the success of the course;
- research and evaluation;
- contact hours with learners.

8.11 In planning workloads, it is recognized that more time is needed for research and development of electronically-offered programmes because of the complexity and expense of virtual education.

8.12 The workload of staff involved in online support for learners is carefully monitored.

HR systems

8.13 Arrangements are in place for the proper recruitment, training, monitoring and payment of necessary part-time and contract staff.

8.14 Staff selection and promotion criteria give priority to quality of performance in course development, teaching, and management of learning.

8.15 There is an effective performance management and appraisal system for all staff.

9. Management and Administration

There is effective and accountable management of communication and information as well as human and material resources; democratic governance structures are in place; efficient administrative systems support the activities of the educational provider; the educational provider is financially sound and can make reliable educational provision.

Elements of the Criterion

Accountability and governance

9.1 There are clear lines of accountability within the educational provider, between the educational provider and its governing structures, and between governing structures and the community.

9.2 Proper accountability structures and mandates for responsible officers are in place.

9.3 Staff and learners and external stakeholders are represented on governance structures.

9.4 Mechanisms are in place to prevent staff from using their position of power within the institution to generate extra revenue for personal benefit or double payment for the same work.

Management of communication

9.5 There are effective systems for communication with current and potential learners, with key outside bodies, with governance structures, and with all staff and tutors involved in courses.

9.6 Enquiries, applications and complaints are dealt with quickly and clearly within a structured administration system.

9.7 Learners' questions are answered quickly, clearly, and supportively.

Management of the curriculum

9.8 Appropriate schedules are developed for all activities forming part of the distance education system, with due attention given to lead times needed to meet deadlines.

9.9 Enrolment practices include provision of accurate, helpful information to prospective learners, as well as efficient handling of money and registration information.

9.10 Production and delivery of course materials is fast, accurate, and reliable. Where existing systems prove inefficient, creative alternatives are found.

9.11 There are systems to organize decentralized support for remote learners – grouping of learners, allocation of tutors, location of suitable sites of learning.

9.12 There are clear procedures to receive, record, process, and turn around assignments.

9.13 The turnaround time on assignments is kept to a minimum.

9.14 The examination system, where it is necessary, is reliable and valid.

Management of information

9.15 Learner records (for example, contact details, assessment results) are detailed, up-to-date, and accessible to tutors, academic and administrative staff.

9.16 Tutor records (for example, qualifications and experience of tutors) are detailed for each tutor and available to tutor-monitors.

9.17 Records of course results and other management information can be analyzed to:
- give completion rates for each group of learners;
- identify at risk learners;
- identify inactive learners.

9.18 Pass, throughput and retention rates are monitored.

Management of facilities and equipment

9.19 Facilities and equipment support the learner and are appropriate for the education and training services provided.

9.20 In the case of electronically-offered programmes, the provider ensures the reliability and predictability of a 'fit-for-purpose' teaching and learning delivery platform, and there is a budget for regular upgrading.

9.21 Equipment and facilities are well-managed and maintained and secure against damage or theft.

9.22 There are emergency methods of communication for use in the event of a failure of the primary channel of communication, and these are fail-safe.

9.23 Staff and learners are trained in the use of the equipment, facilities, and communication and information systems.

Management of finances

9.24 Proper budgetary processes are in place to ensure that allocation of resources reflects the goals, values and principles of the educational provider.

9.25 Financial procedures (for example, handling of fees, orders, accounts, receipt of external funds, and part-time and full-time salaries) are known and adhered to.

9.26 Budgeting procedures are in place to deal with allocation of resources and monitoring of expenditure. Budgeting procedures are flexible enough to promote and enable constructive experimentation in design and delivery methods.

9.27 Proper evaluation systems are in place to compare estimated goals and budgets with actual achievements.

9.28 Clear decision-making structures exist for seeking and receiving funds and allocation and control of resources.

9.29 Financial aid and information about criteria for its allocation are provided for learners, external funding and donations permitting. Information about financial aid is clear to all learners.

10. Collaborative Relationships

In the interests of cost-effective provision of education and training, collaborative relationships are formed and collaborative projects are undertaken wherever possible.

Elements of the Criterion

10.1 Wherever possible, collaborative relationships (involving public and private institutions, governmental and non-governmental educational providers, stakeholders and/or community structures as well as agencies or providers outside of the country) are formed for:

- sharing developed courses;
- jointly developing new courses;
- sharing facilities such as libraries and learning centres;
- sharing regional centres for learner registration, distribution of study material, and examinations;
- jointly delivering programmes;
- collaborating in research.

10.2 Membership of relevant associations and forums is encouraged.

10.3 The programme plan includes criteria for selecting partners and contractors and the means to monitor and evaluate their work.

10.4 To facilitate workplace learning, partnerships are built with employers that enable productive experiential learning opportunities for learners.

10.5 In the organization of consortia for programme development or delivery, structured contractual relationships are formed to protect the interests of all parties including learners. Performance expectations are defined in contracts and agreements.

10.6 In cases in which providers offer programmes developed externally (either by an e-university or other external sponsoring agencies), there are clear procedures for programme approval in which quality assurance requirements of both provider and the external body are dovetailed.

10.7 In programmes delivered collaboratively, responsibility for performance remains with the provider that certificates learners.

10.8 In the case of public-private partnerships, the public partner takes full academic and quality management responsibility, and ensures that learner rights are protected.

11. Quality Assurance

There is an integrated framework at a policy and practice level that informs a clear cycle of planning, implementing, monitoring, reflection and action to ensure that learners' and staff needs as well as the needs of other clients are met.

Elements of the Criterion

11.1 The provider ensures that day-to-day activities are aligned with its mission, goals, principles and policies in relation to national and/or regional priorities.

11.2 Internal quality assurance processes are articulated with external processes as laid down by the relevant quality assurance bodies.

11.3 There is a clear cycle of planning, development, documentation, reporting, action, and review of policy and procedures.

11.4 In the case of electronically-offered programmes, mechanisms for monitoring learner participation and performance are designed into the technical platforms used in electronically-delivered programmes. For example, systems may be designed to track:

- the time spent by different learners on components of the materials;
- the sequence of choices made by learners in accessing web-based files; or
- learner participation in online discussions.

11.5 The provider engages in benchmarking and uses appropriate monitoring and evaluation techniques to gather and analyze data to use as a basis for setting priorities and planning for quality improvement.

11.6 There are demonstrable processes and ongoing efforts to improve the quality of teaching and learning according to priorities identified through monitoring and evaluation processes.

11.7 Staff development is a fundamental strategy to promote quality service provision.

11.8 Staff, learners, and other clients are involved in the process of quality assurance and quality review.

11.9 There are clear routines and systems for quality assurance, and staff are familiar with those that relate to their work.

11.10 Quality management mechanisms are in place to ensure that exported programmes are of equivalent quality to those offered in South Africa, and that there is compliance with the national quality criteria and other requirements of the importing country.

12. Information Dissemination

Education and training services of the educational provider are effectively and accurately promoted in a variety of ways.

Elements of the criterion

12.1 The publicity provided for each programme is accurate and sufficiently detailed to enable applicants to make an informed choice. (The following is a suggested list of such information: target learners, entry requirements, aims and learning outcomes, content, learning material, teaching and learning activities, scope of programme, learner support services, assessment and accreditation procedures, price, payment conditions, right to return course materials, recommended time limits for completion).

12.2 In the case of programmes using electronic methods, the learner is informed regarding access to technologies used in the programme, technical competence required, and the nature and potential challenges of learning in the programme's technology-based environment.

12.3 Employers and others who enter into collective agreements regarding education or training have received sufficient and correct information about the content and outcomes, entry requirements, implementation and aims of the programme.

12.4 The provider's advertisements are truthful, objective and informative and meet the clients' needs.

12.5 In the case of public private partnerships, public partners monitor the advertisements of private partners to ensure alignment.

12.6 Information about programmes reaches as many as possible of those who can be expected to have a need or use for these programmes, given limitations imposed by resources and available information channels.

12.7 The institution uses effective learner recruitment, selection, support and development procedures to ensure that sufficient numbers of adequately-prepared learners enter and succeed in the programmes.

12.8 These strategies form part of the institution's management of information system and are subjected to institutional cyclical reviews.

13. Results

The educational provider fulfils its mission and individual programmes achieve valid teaching and learning goals in cost-effective ways that have a positive impact on society and meet the needs of clients and national priorities.

Elements of the Criterion

13.1 The educational provider is fulfilling its mission and attaining its transformation goals.

13.2 Learners are attaining the intended outcomes specified by the provider in the design of the programme.

13.3 Expert peers/professional bodies are satisfied with the relevance and quality of learning achieved by learners on the programme.

13.4 Learners and recent graduates are generally satisfied with the programme (in particular its learner support and assessment practices) and its staff.

13.5 Employers/ the professions/ the community (as appropriate) are satisfied with the quality of the graduates from the programme.

13.6 The programme team is satisfied with the leadership and management of the programme, as well as the resources and facilities allocated to them to run the programme.

13.7 Staff are all involved in a co-ordinated way in continuous improvement of the programmes, courses, course materials, administration, and support services.

13.8 Sufficient numbers of learners complete individual programmes and courses successfully to justify the cost in time and person-power of designing programmes, courses, and the learner support system. Pass, throughput and retention rates are monitored.

13.9 The provider has financial results that afford the learners a reasonable prospect of completing their studies, and sufficient surpluses to ensure future development of products and services.

13.10 Programmes are achieving equity in access, retention and success rates for graduates in terms of requirements of relevant authorities.

13.11 Feedback and results of the programme review/evaluation are used to effect improvements in the programme's design and delivery and to develop further educational expertise of academic staff.

addendum to section two

A selection of criteria that address current concerns in South African distance education

For ease of reference, the current concerns in distance education have been organized into the following categories:

- Staffing;
- Programme development;
- Course design and course materials development;
- Assessment;
- Course delivery and learner support;
- Programme monitoring and evaluation;
- Finances/planning.

Under each of these categories, the relevant quality criterion has been quoted and the current concern explained.

Staffing

1. Workload of course co-ordinators

Relevant quality criterion

3.17 Numbers of learners enrolled on a programme do not exceed the capacity of the staff and the administrative infrastructure to provide for learner support and assessment needs in terms of the criteria in this document.

Reason for concern

There is an underestimation of the amount of work that is involved for academic/course co-ordinators in supervising materials development, assessment design, tutor training, monitoring and support, quality management of assessment, response to learner queries, and processes for monitoring and review. At some distance education institutions, academic staff are responsible for the coordination of between five and ten courses. This means that their time is spent almost entirely on writing tutorial letters, and they have no time to engage tutors, train and support them, and ensure that their work is up to standard. This effectively means that, although learning centres may be in place, and facilities exist to employ tutors, time constraints make academic/course co-ordinators fall back primarily on correspondence methods.

There is also too little recognition of how the workload increases for the numbers of learners registered on the programme. If there is to be a tutor: learner ratio of 1:30, a course of 1000 learners will need about 30 tutors. To train, monitor, and moderate the assessment of these 30 tutors, supervise monitoring and review, and sign off payment requires considerable management. Moderation alone would involve looking at about 500 assignments/ examinations over a year, which involves 125 hours or 16 days of work. Tutor training would involve five days (including preparation), supervision of marking procedures another five days, monitoring and review about 15 days, development of tutorial and assessment material about 15 days, administration for tutors about 10 days, and response to learner queries, about 30 days (15 minutes per learner per annum). This is a total of 101 days. If, in addition, course co-ordinators are required to tutor learners on the programme themselves, then a further 40 days could be added. Presumably the academic staff member needs some time for his or her own research, participation in faculty affairs, and participation in the wider educational community. If about 30 days are allocated for this, then coordination of one course is a full-time job of about 170 days per annum.

These realities need to be taken into consideration in planning. There need to be strategies for scaling up and down the number of course co-ordinators when numbers of learners increase or decrease.

2. Systems for appointment/payment of part-time tutors

Relevant quality criterion

> **8.13 Arrangements are in place for the proper recruitment, training, monitoring and payment of the necessary part-time and contract staff.**

Reason for concern

In many predominantly face-to-face institutions, systems are lacking to appoint and pay short-term, part-time staff. This creates problems for programmes that require the hiring and payment of tutors for weekend contact sessions and/or marking of scripts. A decentralized learner support system is impossible without the ability to appoint such tutors in flexible ways, and if tutors are not paid promptly, the provider will not be able to retain them. This usually means that programme staff, rather than the human resources department of the institution, need to manage contracts and payments.

3. Administrative support

Relevant quality criterion

> **8.5 The educational provider employs sufficient administrative and technical staff to handle specialized tasks of registry, despatch, management of assignments, administrative support, as well as technical IT support to learners and staff.**

Reason for concern

Distance education programmes typically require more administrative support than face-to-face systems. Staff are needed, for example, for decentralized registration of learners; materials production and despatch; maintenance of information management systems; administration of decentralized contact sessions; and assignment management (receiving, opening, sorting, distributing for marking, entering marks, returning). The international norm for dedicated distance education institutions is one administrative staff member for each full-time academic staff member. In South Africa, this may be over-ambitious. But there is a need for increased administrative support. This could be in the form of full-time appointments, but part-time or sub-contracted support can be brought in to scale-up capacity at critical times – for example, when assignments need to be sorted or materials despatched.

Programme development

4. Information on target audience

Relevant quality criteria

2.1 The provider has developed a learner profile that identifies the characteristics and situation of distance education learners. This profile should include:

- demographic factors – for example, age, gender, geographic location, and occupation/employment;
- language profiles – including language ability in main language of teaching and learning, language background, and multilingual language ability;
- motivation for learning – for example, for career purposes or personal interest;
- educational background/learning experience – for example, prior learning and experience, prior qualifications, experience of distance learning, learning skills and styles, and language background;
- special needs – for example, barriers to learning, physical disabilities or learning difficulties;
- resource factors – for example, financial resources, place of learning, times available for learning, access to electricity, access to media and technologies;
- experience and knowledge of technology; and
- success rates of past and present learners.

4.1 The course is designed with national needs as well as the needs of prospective learners and employers in mind.

Reason for concern

Analysis of the needs of the target audience and collection, maintenance and use of learner information is critical in distance education. Because learners are not very often met face-to-face, an extra effort needs to be made to understand the varying contexts and needs of learners. If learner profiles are not known, the course cannot be designed with needs, knowledge and experience of the learners in mind, which may result in unnecessary drop-out.

5. Credit rating of programmes

Relevant quality criterion

4.7 The amount and complexity of work required to complete the course merits the credits which it has been allocated. This also applies to assessment for recognition of prior learning and experience.

Reason for concern

For qualifications registered on the South African National Qualifications Framework (NQF), learning is measured in notional learning hours, rather than chronological duration. It has been agreed that 10 notional learning hours is equivalent to one credit. This means that what was formerly documented as a one year qualification, is now registered as a 120 credit qualification – because it is assumed that one year of full-time study requires 1 200 notional learning hours.

Because of the fact that it is credits rather than the duration of the programme that determines whether or not a qualification can be awarded, some providers have been claiming that part-time learners can be awarded qualifications in periods that are exactly the same as if the learners were studying full-time; for example, a 360 credit first degree in three years part-time[1] . The NQF rule of thumb that each credit is equivalent to 10 notional learning hours is often ignored – more learners will generally be attracted to programmes that appear to offer more for less time and money. In addition, if the provider offers a programme in less time, delivery costs will be reduced considerably.

There are norms for the number of credits that can, under normal circumstances, be earned in a single year of part-time distance education study. International norms state that a part-time distance education learner can be expected to study 12 to 15 hours a week on a distance education programme for approximately 40 weeks per year – a total of 600 notional learning hours. This includes time for independent study from course materials, time spent participating in contact sessions or practicals, and time spent on assessment. If learners are expected to do more than this in a single year, then either the course is overloaded, or the amount of work required is insufficient to merit the credits awarded. A possible exception to this is in programmes in which there is work-integrated learning; for example, in-service teacher development, in which lesson preparation may be part of the daily work of an employed teacher as well as a requirement of the in-service programme.

6. Academic level of programme

Relevant quality criterion

> **6.3 The level of challenge of the assessment in a programme is appropriate for the level of the qualification to which it leads.**

Reason for concern

In a number of programmes, good pass rates are achieved not because the teaching and support is good, but because the learning and assessment demands are low; for example, an Honours level programme requiring mainly rote learning or the mastery of a single textbook. If courses in a programme have good pass rates because learning and assessment

[1] There are increasing numbers of full-time distance education learners at dedicated distance education institutions such as UNISA, and so of course this issue will not apply to them.

demands are below the acceptable level for the qualification to which the programme leads, there is clearly a problem. Currently, the only evidence that is regularly available to judge level is external moderator reports. There should also be reports from benchmarking processes. Levels need to be assessed by peer experts in the relevant discipline/field.

Course design and course materials development

7. Course information for learners

Relevant quality criterion

4.3 For each course, there is a publicly accessible and learner-friendly description of aims and learning outcomes; entry level skills, knowledge and experience; credit rating and/or notional hours of learning; target learners; teaching and learning strategies; content outline; items in the learning package (including elements such as study guides, textbooks, tutorial letters, audiotapes and videotapes); assessment strategy; and a year plan containing key dates for learners.

Reason for concern

In many courses, there is little attempt to explain different elements of the course and provide learners with a guide to different components of the course material. Learners are not advised even about the sequence in which they should study courses in the programme. Sometimes learners receive incomplete sets of course materials, receive them in the incorrect order, or too late to make use of them for assessment purposes.

8. Lead time for course materials development

Relevant quality criterion

5.1 The development of course material is based on a project plan which describes, for example, finances and other resources, delegation of responsibility among those involved, and an adequate time schedule for the work.

Reason for concern

Since materials need to be ready at the beginning of a course/programme, lead time and upfront financing are needed not only for developing and evaluating course materials, but also for producing and distributing them. Internationally, norms for materials development are between 10 and 100 hours for every hour of learner learning. In South Africa, most course writers (often without any staff development) are expected to produce materials at a rate of below one hour for every hour of learner learning. International experience illustrates unequivocally that it is impossible to produce materials of a reasonable educational quality with such a small investment of time. It is not only the materials writing person hours that should be considered in course materials development. Planning, writing, critical reading, developmental testing, layout, editing, proofing and production need to be taken into consideration – these processes cannot be done simultaneously.

9. Materials review

Relevant quality criterion

> **5.8 The materials are periodically reviewed in the light of ongoing feedback from learners and tutors and advances in knowledge and research.**

Reason for concern

Because of the difficulties of revision of printed/published course materials, often distance education courses are used for too long and are not updated. They often have reference lists where the most recent references are15 to 20 years out of date. Aside from changes in the discipline/field, the courses often do not even reflect changes in the world (for example, there are Geography textbooks that still refer to East and West Berlin). There need to be standardized procedures or timelines for curriculum and course review.

Assessment

10. Formative assessment

Relevant quality criteria

> **6.1 Assessment is recognized as a key motivator of learning and an integral part of the teaching and learning process. It is used to inform teaching practice and improve the curriculum.**
>
> **6.4 There is a range of formative and summative assessment tasks and methods which ensure that all learning outcomes are validly assessed.**
>
> **6.14 There are clear procedures to receive, record, process, and turn around assignments within a timeframe that allows learners to benefit from formative feedback prior to submission of further assessment tasks.**

Reason for concern

Although it is key to any educational programme, formative assessment is crucial in distance education. This is because learners with limited time engage with materials primarily in relation to tasks set for assessment. However, many distance education courses do not provide opportunities for formative assessment. Absence of formative assessment denies learners what is often the only opportunity to receive individualized feedback on their work. Furthermore, if formative assessment does not contribute to the final mark, then the motivation for learners to do the tasks diminishes – it must be remembered that distance education learners are usually fitting their study into already full lives, and if an activity is not compulsory, there is the tendency to overlook it. The following indicates some of the varieties of less than satisfactory assessment practice in South African programmes at the moment:

- There are assignments, but they are not compulsory and do not count for the year mark. Only the examination mark counts.
- There are assignments, which though compulsory, are not marked individually. Learners mark their own assignment against generic tutorial letters/answer sheets. However, it is only if learners submit the assignment that they are given entry to the examination.
- There is one assignment, and it is marked and feedback provided to the learner, but the assignment does not count towards the final mark. Only the examination counts.

11. Quality assurance of tutor marking

Relevant quality criteria

6.11 Where part-time tutors are involved in assessment, they are trained for the task, and academic staff monitor and moderate both formative and summative assessment to promote reliability and fairness.

6.13 Marking procedures for both formative and summative assessment promote consistency and accuracy of marking, grading, and provision of feedback to learners.

Reason for concern

Because of the large numbers of learners in some distance education programmes, academic staff often delegate marking of assignments to tutors, and do not maintain sufficient control of standards. Even with experienced staff, there is great variability in the approach to marking, but with large numbers of learners, and part-time staff, there is an even greater chance of variability. Best practice in standardization of tutor marking characteristically involves organizing marking sessions for each assignment in which course co-ordinators assist groups of tutors to work collectively through a number of assignments in order to work out a common approach to grading and to ways of responding to common problems. These marking sessions also provide an opportunity for internal moderation, usually by course co-ordinators. Marking sessions also tend to improve turnaround time as much of the marking is done in the sessions, and it is easier to control how long the rest of the marking takes.

Course delivery and learner support

12. Materials delivery systems

Relevant quality criteria

9.10 Production and delivery of course materials is fast, accurate, and reliable. Where existing systems prove inefficient, creative alternatives are found.

9.22 **There are emergency methods of communication for use in the event of a failure of the primary channel of communication, and these are fail-safe.**

Reason for concern

In a distance education programme in which the main means of communication of the curriculum is the course materials, it is only when learners receive the materials that they can start learning. Failure to produce and despatch materials on time is non-delivery of the programme.

If programmes use sophisticated technology (such as satellite broadcasts, video-conferencing, or the Internet for online discussions) the teaching and learning is dependent on ensuring connectivity. This means that the technical infrastructure (for example, ISDN lines, electricity, Internet service provider connections) that facilitates the delivery is functional. If there are technical problems, the teaching and learning does not happen - it is just the same as if no course materials had been delivered.

13. Integration of contact sessions into course design

Relevant quality criteria

7.9 There are sufficient contact sessions to ensure that learners are able to achieve the outcomes of the course.

7.10 Contact sessions are integrated into the course design, rather than being an add-on extra.

Reason for concern

There appears to be a lack of understanding of the particular character of learner support in distance education programmes. In distance education, learner support is not simply individual counselling or administrative support or support for particular learners who may be struggling. It is support for every learner, it directly affects the success of the learner on the course, and is part of teaching and learning on the course. It is more like the official lecture programme at face-to-face institutions – a recognized element of the curriculum. However, in many distance education programmes in the country, this kind of learner support is not built into the design of a course. Instead learner support is an optional extra, very often for an additional fee. What should happen is that whatever is needed to help learners achieve the outcomes of the course is included in the course fee and integrated into the course design. Contact sessions/tutorials can, of course, be conducted using various forms of technology, rather than requiring tutors to meet learners face-to-face. They can be individual tutorials or group tutorials. Academic learner support should be initiated by the provider, rather than by the learner and it should be integrated into course design.

14. Size of contact sessions or tutorials

Relevant quality criteria

7.1 Learners are encouraged to create and participate in 'communities of learning' in which the individual learner thinks and solves problems with others engaged in similar tasks. This is facilitated through a range of learner support mechanisms – peer support sessions, tutorials/contact sessions, teaching on assignments, support in the workplace (mentoring), email and Internet communications, for example.

7.9 The tutor/learner ratio is sufficiently small to enable tutors to know their learners as individuals, be able to support them in their study and monitor their progress.

Reason for concern

In a number of distance education programmes in the country, contact sessions take the form of lectures to large numbers of learners at a central venue. Typically in this approach, lecturers from the central campus go on a tour of main learning centres around the country and have one or two hours at each centre with 50 to 100 learners. The two hours are usually focused on 'examination preparation'. In these kinds of sessions, although learners can ask questions, there is very little opportunity for real interaction. In such a large group learners do not get to know each other or the lecturer, and learners are faceless and nameless to the lecturer. Clearly in such a situation, the main aim of learner support – the development of communities of learning in which the individual learner thinks and solves problems with others engaged in similar tasks – cannot be achieved.

15. Telephone support

Relevant quality criterion

7.13 There are opportunities for individual academic support for learners either by telephone, by appointment, or online.

Reason for concern

Individual academic support, even if not extensive, should be available if particular learners need more guidance than is provided in contact sessions, tutorials, or tutorial letters. Although providers may claim that they offer such support, the mechanisms for offering it should be interrogated. For example, often, although providers claim that they offer telephone support for learners, it is clear on further investigation that the times at which it is offered make it almost impossible for the target learners to access it. For example, in many in-service teacher education programmes, telephone consultation times are 8h00 to 15h00 on weekdays. This is exactly the time that teachers are occupied at school and cannot take advantage of the service. This is particularly problematic if the telephone support is the only way in which learners can contact the provider.

Programme monitoring and evaluation

16. Means to determine inactive or at risk learners

Relevant quality criterion

9.17 Records of course results and other management information can be analyzed to:

- **give completion rates for each group of learners**
- **identify at risk learners**
- **identify inactive learners.**

Reason for concern

It is relatively easy to present inflated learner numbers for distance education programmes, if it is only registration information that is used. Learners can be registered but dormant in every other way and not costing the provider any money to service. There need to be ways to determine whether or not learners are active; for example, by submission of assignments or participation in contact sessions. Otherwise, accepting a subsidy for these learners, or using the numbers to advertise the popularity of the programme, is dishonest.

17. Acting on monitoring information

Relevant quality criteria

11.5 The provider engages in benchmarking and uses appropriate monitoring and evaluation techniques to gather and analyse data to use as a basis for setting priorities and planning for quality improvement.

11.6 There are demonstrable processes and ongoing efforts to improve quality of teaching and learning according to priorities identified through monitoring and evaluation processes.

Reason for concern

There is far too little investment of either time or resources in monitoring of programmes. This is an issue for all programmes, whether face-to-face or distance. But it is more critical in distance education: increased complexity of systems and remoteness of learners from the centre mean that it is difficult to pick up informally when things are not happening. Formal monitoring systems have to be developed to provide information to management at the centre, so that action can be taken before it is too late. There are customarily three problems with monitoring systems:

- plans for monitoring are over-ambitious – too much information is collected, and the nature of the information is difficult to analyze;
- data is collected but never analysed and reported on;
- no action is taken on the basis of the reports.

18. Throughput rates

Relevant quality criterion

> **13.8 Sufficient numbers of learners complete individual programmes and courses successfully to justify the cost in time and person-power of designing programmes, courses, and the learner support system. Pass, throughput and retention rates are monitored.**

Reason for concern

Although pass rates on individual courses are generally relatively unproblematic, throughput (number of originally-enrolled learners that complete the whole programme successfully) in distance education programmes is generally low. Low throughput rates in distance education are predominantly, but not exclusively, in longer programmes (360 credit degrees or diplomas), and in 'difficult' programmes, such as a Bachelor of Science. There is an argument for being lenient on distance education programmes with regard to throughput rate – opportunities for flexibility, taking individual courses rather than the whole programme, for 'interest', and the strains of part-time study could account for higher drop-out rates than are customary in full-time study.

However, a number of other factors could also be responsible for low throughput, including:

- inadequate learner support;
- admissions policies that are too open, allowing access to programmes to learners without the necessary background to succeed in them;
- course materials that do not teach properly;
- insufficient formative assessment and/or little feedback on assessment.

It is the responsibility of programme staff to ensure that appropriate learners are admitted to programmes, and that teaching, learning, assessment and support systems are good enough to provide those learners with a reasonable chance of success.

This is important, not only from the point of view of the learners, but also from the point of view of cost-effectiveness of the programme. To take a hypothetical example: if the purpose of the programme is to add to the pool of Science graduates in the country, and R2 million is budgeted for the delivery of a programme to achieve this purpose for 200 potential graduates, then R10 000 is being spent on each graduate. If only 5% of the initial intake of learners graduate, then the cost per successful learner rises to R100 000, which is clearly unaffordable.

Finances/planning

19 . Programme planning, budgeting and financial reporting

Relevant quality criteria

3.8 Programme planning and budgeting are aligned, with potential income clearly identified, and appropriate levels of resource set aside for course design and development, for administrative systems and for supporting learners.

9.27 Proper evaluation systems are in place to compare estimated goals and budgets with actual achievements.

Reason for concern

Research into the costing of large-scale distance education programmes indicates that when learner numbers are 500 or above, it begins to be possible to run such programmes on learner fees alone, combined with reduced subsidies from government, even where there is substantial learner support provided. This makes it possible for these programmes to cross-subsidize other programmes. Although some cross-subsidization across programmes may be necessary in order to achieve the provider's mission, often the provider makes no investment at all in the improvement of quality of large scale programmes. This is problematic because learners paying the fees do not get the benefit of their investment. There is a need for programme-based budgeting with regular financial reporting so that resources can be tracked and a reasonable proportion used for quality improvement for learners whose fees are paying for the programme.

3 Section THREE
c ase studies

Introduction to the case studies

Selection of case studies

In this section, we present fourteen case studies that are intended to illustrate the criteria in Section Two and apply them to practice.

The case studies were not selected from a thorough examination of available good practice in distance education in South Africa - there are numerous other South African examples of good distance education practice. Nor were they the result of a process of external evaluation.

The case studies were selected by a task team set up by NADEOSA in response to a request that the Quality Criteria should be published.

The task team sent out an invitation to all NADEOSA members to submit case studies of good practice that illustrate or exemplify one or more of the criteria. Eight case studies were submitted from the University of South Africa (UNISA), two from Technikon South Africa (TSA) (now part of the new UNISA), three from the University of Pretoria, one from the University of the Witwatersrand (Wits), and two from the University of KwaZulu-Natal in Pietermaritzburg.

In the majority of instances, the case studies are based on self-reported data. Practices, as reported by the writers, illustrate the quality criteria well, but the editors have not verified the information in a triangulated research process, as this was not the aim of the project. The purpose of this set of case studies is to use accounts of practice to exemplify the criteria, and assist providers in applying the criteria to their own work.

In the initial reading of the case studies, the task team made a selection based on the following criteria:

- Whether or not the case studies show innovative attempts to address distance education challenges;
- How representative the case studies are of the range of South African distance education programmes;
- How comprehensively the quality criteria can be illustrated through the case studies.

After the initial reading, the decision was made not to include five of the case studies because they did not represent a sufficiently substantial attempt at successful innovation. A number of gaps were also identified. Firstly, it was noted that there had been no submissions from private providers. Secondly, there was an under-representation of case studies of distance education courses/programmes using Information and Communication Technologies (ICT). Thirdly, there was an under-representation of postgraduate programmes using distance education methods. Finally, fairly late in the process, it was realized that none of the case studies focused specifically on quality issues related to course materials - a key dimension of distance provision.

Unfortunately, although approached, private providers did not submit any case studies. With regard to postgraduate programmes, the gap was filled through the adaptation of a case study on the Master of Law programme from Stellenbosch University, originally prepared as background research for the Council on Higher Education report, *Enhancing the Contribution of Distance Higher Education in South Africa*: *Report of an investigation led by the South African Institute for Distance Education* (Pretoria: Council on Higher Education, 2004). A late submission of a case study from the University of the Witwatersrand on an online Masters course provided a second postgraduate example. Both these case studies also contribute to discussion on the use of technologies other than print for distance education. Finally, with permission of the provider, a case study was written by one of the editors on the approach to the development of course materials for the teacher upgrading degree offered by the University of Fort Hare's Distance Education Project.

The role of the editors in the preparation of these case studies was threefold:

- To edit the work for readability, focus and unnecessary repetition;
- To prepare an introduction to each case study indicating the focus;
- To annotate the case study with the insertion of relevant elements from the quality criteria.

However, as far as possible, the style of the original author has been retained.

Applying the criteria to the case studies

The criteria in Section Two are applied to the case studies in this section in a particular way for particular reasons.

Firstly, although the criteria in Section Two are communicated through lists for ease of reference and represent one way of categorizing the components of good distance education practice, it is not intended that when applied to practice, they should be seen as operating in isolation from each other. An attempt to try to apply criteria discretely could mean, for example, that the necessary relationship between assessment, learner support and management (through, for example, carefully scaffolded assignments, individual feedback on assignments, and an assignment management system that allows students to receive comment on one assignment before the next is due) is lost. As a result, though the focus in each of the case studies in this section may be on one or two criteria, relevant elements from other criteria are also included.

Secondly, the criteria are an updated description of the understanding of good practice in distance education in South Africa. However, they should not be regarded as definitive. There should be space to allow good practice to show the limitations of the criteria. In a number of the case studies in this section, the practice described goes beyond the criteria. In addition, it became clear to the editors as the criteria were applied to the case studies, that though sound pedagogical approaches (based on an understanding of how learning happens and the kinds of teaching that promote learning) underpin all quality practice, pedagogical issues are implicit rather than explicit in the criteria. The criteria, like any attempt to describe good practice succinctly, have their limitations.

The spirit in which the criteria are applied to practice in this book is highlighted in the University of KwaZulu-Natal case study on *Leadership and Management for Change*. The case study uses the Freirian notion of 'dialogue' and describes a quality course as 'dialogic space'. In this section of the book, we adopt this notion of dialogue and attempt to model the two-way process of dialogue between criteria and practice. The criteria are applied to practice not as a checklist of questions is applied to a product in the process of quality control. It is understood that quality arises not from merely applying criteria, but from interpreting criteria in the light of experience, and experience in the light of criteria. And we hope, though we cannot insist, that through this dialogue, those who read the book will be given insights that will inform better practice. This is the reason for the way the case studies have been formatted - relevant criteria are placed in the margins so that practice and criteria are juxtaposed and can 'speak' to each other.

The case studies

What types of distance education practice do the case studies represent?

Provision by both dedicated distance education institutions and predominantly face-to-face providers

Some case studies illustrate clearly how the demands for quality distance education delivery are creating the need for dedicated distance education providers to look to methods used by face-to-face providers, particularly in the area of learner support, as well as to refine the art of creating course material that supports independent learning. Conversely, other case studies illustrate how face-to-face providers take on the challenge of developing not only the systems and human resources to deal with large-scale distance delivery, but also learner support for the more diverse group of learners that is attracted when access and reach are increased.

A spectrum from small scale courses and programmes to large scale programmes reaching thousands of students

If distance education is going to fulfil its potential of increasing access, then it must take on the challenge of providing cost effective education to large numbers of diverse students. However, it is critical that when programmes enrol large numbers of students, they have the systems and the personnel to provide students with the necessary support to be successful. The case studies include programmes such as the *Leadership and Management for Change* course offered by the University of KwaZulu-Natal with as few as 13 students (tutored by three lecturers), as well as programmes such as the teacher upgrading programme offered by UNISA with an intake of 2 318 students in the first cohort. The case studies show how the criteria are applicable to large and small programmes alike.

A spectrum from traditional paper-based provision to state-of-the art technological provision

Some of the case studies in this collection are traditional paper-based programmes, but others make use of state-of-the-art technology appropriately deployed for the target audience and demand of the curriculum. Principles behind choice of media and technology are the same for distance education provision as for all education. What this collection shows, is that, as Mary Thorpe says:[1]

> The future does not consist of focusing on what makes distance education different, but on ensuring that it cannot be ignored, because it continues to work with the latest and the best ideas, about both pedagogy and technology.

Much discussion of distance education focuses on the description of systems that make distance education different from other provision. This is for good reason, because systems required for large-scale delivery are much more complex than those required for small-scale provision in which frequent no-cost adjustments can be made in response to interactions with learners. However, although quality distance education does depend on good systems, these need to support quality teaching and learning. What Mary Thorpe is referring to above is the frequent observation that the degree of planning required for distance education to function at all often means that distance education works with 'the latest and best ideas' in order to achieve what seems impossible.

A spectrum from provision for under-prepared learners who would not normally qualify for tertiary studies, to provision for learners in upper-postgraduate studies

At one end of the spectrum is a case study on an upgrading programme for teachers, some of whom may not even have a senior certificate. At the other end is a postgraduate Masters in International Trade Law offered to learners not only in South Africa, but also abroad, and a critical language awareness course for a Masters in Education delivered by three universities on different continents. There are case studies of programmes/courses for technical, vocational and professional career paths (such as animal health, court interpreting and teaching), as well as case studies of courses on purely academic subjects (such as linguistics and theology). The case studies illustrate how distance education methods can be used for courses at varying levels across education and training.

What criteria are the focus for each of the case studies?

As has been mentioned, an attempt has been made to select case studies which exemplify aspects of all thirteen quality criteria.

An under-represented criterion is that on Information Dissemination or Marketing. This might be a result of the fact that there are no case studies from private providers. Public providers of distance education do not yet have very systematic ways of working with or reporting on marketing/information dissemination.

There is also a weakness in the representation of the criterion on Policy and Planning. This is because there are no case studies included that describe distance education at an institutional or broader systemic level. Comment on the criteria from the Distance Education Association of Southern Africa (DEASA) revealed that a major critical success factor for distance education programmes is a national understanding of and commitment to institutions in their policy and planning for distance education. South Africa is better off in this respect than many of its fellow Southern African Development Community (SADC) countries. Section One of this book indicates that, as far as national commitment to open learning and distance education is concerned, South Africa does not have the kind of problems experienced by such countries as Lesotho and Botswana. In the last ten years, statements about distance education and open learning thread through policy and policy implementation documents. Furthermore the recent research of the Council on Higher Education[2] indicates that, at least in higher education, institutions have a high degree of awareness of the need for policy in respect of distance education. Increasingly, the Higher Education Quality Committee's audit process will insist that this translates into systems and processes for quality distance education delivery.

What is interesting however, is not only the under-representation of two of the criteria, but the space given to the discussion of one particular criterion in all the case studies - the criterion on learner support. Given the contexts from which learners come in South and Southern Africa, it is unsurprising that a strong emphasis on learner support is essential in distance programmes even at upper-postgraduate levels. This is because most South African learners:

- Are working in an additional language;
- Come from disadvantaged educational backgrounds; and
- Are in environments that are not conducive to independent study, either in terms of access to study resources or in terms of the daily social difficulties that beset particularly those that distance education is seeking to reach.

In the South African context, learner support is not only for the learners for whom the programmes are designed. In large-scale provision of distance education programmes, numbers of tutors need to be employed to support learners in remote areas. But these tutors cannot support learners effectively unless they themselves are trained, monitored and supported. In technical and vocational programmes, where there are many sites of learning, the need for learner support expands still more. It is not only learners and tutors that need support, but mentors in the workplace.

The table below lists, next to each criterion, the case study that focuses most closely on it as well as other criteria to which the case study refers in a substantial way.

Table 1: Case studies and the quality criteria they illustrate

Criterion	Case study with this criterion as the main focus	Other criteria referred to
1. Policy and planning	Some reference to this criterion can be found in the case study from the University of Pretoria (see no 9 below) and from the University of Stellenbosch (see no 13).	
2. Learners	*Accommodating diversity: supporting learning in an in-service teacher education programme offered by the University of the Witwatersrand.* This case study focuses on the importance of obtaining and using learner information as a basis for the design of a layered system of learner support that deals with not only the academic needs of diverse learners but also their personal needs.	Learner support Quality assurance Assessment
3. Programme development	*Addressing the needs of learners and addressing the needs of the nation: a module in UNISA's BA in Court Interpreting* This case study focuses on needs analysis as a basis for programme development.	Course design Assessment
4. Course design	*Engaging students online: a module in an international M Ed in Language and Literacy Education* This case study describes the pedagogical design of online discussions in an M Ed course in critical language awareness offered collaboratively by the University of the Witwatersrand, the University of South Australia, and the Mount Saint Vincent University (Canada).It shows how course materials design, learner support and assessment are very closely related in the design of online learning courses.	Course materials Learner support Assessment
	Learner support from a 'pilgrim companion' and student journals as a form of summative assessment in a UNISA religious studies module. This case study is an example of innovative course design, particularly with respect to learner support and assessment.	Learner support Assessment
5. Course materials	*Something new and different: the key roles of 'imithamo' and 'abakhwezeli' in the University of Fort Hare's B Prim Ed programme.* The contextualization of course materials and the need to use active learning and teaching approaches is the focus of this case study.	Learner support Assessment
6. Assessment	*Assessment in the Diploma in Animal Health Practice at the former Technikon Southern Africa* This case study illustrates how flexibility in terms of entry and exit points as well as in the provision of various sites of learning can be achieved in a single programme through the careful design of assessment.	Programme development

Criterion	Case study with this criterion as the main focus	Other criteria referred to
7. Learner support	*Student support in the first two years of a teacher upgrading programme offered by UNISA* It is not easy to design and manage a decentralized learner support system for a large-scale teacher development programme. This case study reflects honestly on the achievements and difficulties.	Assessment
	Peer Collaborative Learning at the former Technikon Southern Africa This case study shows an effort to respond to low retention and pass rates through the introduction of a cost effective learner support system additional to that already in place for the institution.	Results Human resources strategy
8. Human resource strategy	*Tutor learning, student learning: the B Ed Honours programme at the University of KwaZulu-Natal* In this case study, learner support is about designing ways to select, train, monitor and support the tutors who are responsible for supporting the learners.	Learner support Assessment
9. Management and administration	*The establishment of a unit for distance education in a face-to-face institution: the University of Pretoria* The decision to offer distance education programmes for teachers resulted in the need to design systems for the management of large numbers of learners across the country.	Programme planning Learners Human resources strategy Collaboration Information dissemination
10. Collaboration	*The Leadership and Management for Change course at the University of KwaZulu-Natal: quality criteria and dialogic space* The case study illustrates the benefits of collaboration between an organization with expertise in electronic media and distance education and a university department with strengths in adult education, materials development and organizational development.	Course design Course materials Learner support Assessment Quality assurance
11.Quality assurance	*Self-evaluation in the e-learning unit at the University of Pretoria* This case study is of interest both to readers wanting to study instruments and methods of analysis of self-evaluation data and readers who are interested in what questions to ask about the quality assurance of web-based and online courses.	Human resource strategy Learner support Management
	The quality assurance process for undergraduate courses in the Department of Linguistics at UNISA This case study focuses on an easy-to-implement but comprehensive course level quality assurance process.	Course design Course materials
12. Information dissemination	Some reference to this criterion is to be found in the case study from the University of Pretoria (see no 9) as well as that from the University of KwaZulu-Natal (see no 8).	

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Criterion	Case study with this criterion as the main focus	Other criteria referred to
13. Results	*The Masters programme in International Trade Law offered by the Faculty of Law, University of Stellenbosch* This case study, while focusing on the use of satellite broadcasts as part of the course design, also discusses thoroughly issues related to pass and throughput rates in distance education programmes.	Course design Collaboration Learner support

In conclusion, it must be said that while the case studies represent good practice, they do not show perfect practice. They represent providers using their initiative to improve learning using available resources. Quality provision is achievable if providers use the range of resources at their disposal - such as human resources, available technologies, existing materials, and partnerships - sensibly and creatively.

Endnotes

[1] Thorpe, M. (2003).'Continual Reinvention: The future for open and distance learning'. Keynote presentation at the 10th Cambridge International Conference on Open and Distance Education, September 26th, 2003.

[2] Council on Higher Education. (2004). *Enhancing the Contribution of Distance Higher Education in South Africa: Report of an investigation led by the South African Institute for Distance Education*. Pretoria: Council on Higher Education

Case One: Accommodating diversity: supporting learning in an in-service teacher education programme offered by the University of the Witwatersrand

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Editor's introduction

The Advanced Certificate in Education (ACE) programme at the University of the Witwatersrand (commonly known as 'Wits') illustrates the following criterion well:

> **11.6** There are demonstrable processes and ongoing efforts to improve the quality of teaching and learning according to priorities identified through monitoring and evaluation processes.

Despite the fact that the forerunner of the ACE programme (the Further Diploma in Education) was favourably evaluated as part of the President's Education Initiative research in 1998, that the materials won the NADEOSA Courseware Awards in 2002, and that a book on research into the programme (Adler and Reed, 2002) has received wide acclaim, the programme team was still concerned that aspects needed improvement.

This case study focuses on the improvements to **learner support** introduced during 2003. The programme staff have made an effort not only to gather information about **learners**, but to use this information to understand these learners and design learner support which meets their diverse needs:

> **2.4** Learner information is used to design programmes, courses, materials, learner support, and counselling services that are flexible and learner-centred.

The depth and care of support offered in this programme goes way beyond what is required in the quality criteria, and in significant areas (such as learner support for the Deaf, and the use of contact sessions for modelling and drawing attention to good teaching and learning practices) indicates how the quality criteria should be extended.

The ACE goals and structure

In 2003 the School of Education at the University of the Witwatersrand (Wits) introduced several Advanced Certificates in Education (ACE) (Upgrade). These ACE qualifications followed on from the Further Diplomas in Education that Wits has been offering since 1996.

The goals of the Further Diploma in Education (FDE) programmes were:

- To broaden and deepen teachers' subject knowledge, pedagogic subject knowledge and educational knowledge;
- To extend teachers' reflective abilities;
- To facilitate professional growth;
- To enable access to further education (Adler et al, 2002: 11).

The FDE thus aimed to ensure both professional and academic growth and combined the best aspects of university and NGO teacher in-service programmes on offer at the time: it was a formal programme leading to recognized certification, yet it was also school-focused, with many of the activities requiring reflection or research on school and classroom issues. The materials were written with depth and clarity - in 2000 the FDE in English won the NADEOSA Courseware Award.

Quality Criterion **5.8** The materials are periodically reviewed in the light of ongoing feedback from learners and tutors and advances in knowledge and research.

In constructing the ACE, we followed the tradition of the FDE, yet took the opportunity to adjust the programme structure, as well as rework and update the learning materials. Our aim was to provide improved support structures within learning materials and to ensure that our various modules were in line with current educational policies.

Quality Criterion **4.10** Various forms of learner support are built into the design of the course.

The format of the ACE is mixed-mode: teacher-students engage with interactive learning materials, as well as attend contact sessions. The learning materials present knowledge and activities, enabling teacher-students to work through them systematically on their own. For three of the education modules we use books from the SAIDE teacher education series,[1] while the fourth education module and all specialization modules use materials written by Wits staff. Contact sessions involve a weekend in February and a week each during the school holidays in April, July and September. The programme places emphasis on students working together in study groups.

Quality Criterion **3.15** To facilitate access, entry requirements for the programme are as open as possible, and include recognition of prior learning and experience.

In South Africa, where 20% of all teachers within the school sector are regarded as under-qualified, it is obviously important for higher education institutions to create access for teacher-students[2] who were formerly not eligible. The ACE has achieved this by relaxing entry requirements to allow for a senior certificate (not matriculation exemption) and a three-year teacher's diploma (not a degree) from any college (not just accredited ones).

Attendance requirements are adapted to fit into week-long contact sessions during school holidays. But, as Bertram reflects, 'open access does not necessarily mean equal opportunity for success' (2003:80). Having opened up access, we now see it as our responsibility to enable success - by which we mean providing learning experiences that promote deep learning, improved classroom practices and a more confident sense of professional identity. Our focus therefore is on developing competence, not merely on ensuring a pass mark.

Quality Criterion	**3.16**	Where entry is open, care is taken to provide sufficient academic support to learners who may be under-prepared.

In this case study we reflect on the different forms of support underpinning our practices across the ACE. There are compulsory Education modules and a choice of subject specializations in education for Learners with Special Education Needs (LSEN), Deaf Education or Science. We found that the types of support we offer are surprisingly specialization-specific. Education modules are concerned with academic development and focus on instilling the skills and habits of intellectual work, while the Science specialization is concerned primarily with professional development. The LSEN specialization is experimenting with and modelling ways of including learners that rely on the creativity of the teacher rather than on an increase in material resources. By contrast, Deaf Education is insisting that specialized people be employed and time be invested in the effort to include the formerly marginalized population of Deaf students. All of us pull together for the counselling service and cultural activities during contact sessions. Our main contention is that for teacher-students to achieve success, we need to provide them with support structures and practices specifically geared to meeting their needs.

The ACE students

Wits has between 200 to 260 teacher-students enrolled over the two years across various ACE specializations. Through the use of autobiographical questionnaires and introductory projects we get to know the students at the beginning of the academic year, and have found a wide diversity among them:

- **Geographical diversity**. Teacher-students enrolled in Deaf Education and LSEN are based in various provinces, with a large proportion from rural areas in Limpopo and KwaZulu-Natal, some even from as far as Swaziland. By contrast, teacher-students enrolled for the Science specialization are located in Gauteng.
- **Diversity of professional practice.** Teachers work in all phases: Foundation, Intermediate and Senior Phase. Still others work in areas of early childhood development or adult education. A substantial number of teacher-students work in 'special schools' for the blind or deaf. A few district support specialists have enrolled for LSEN and a few teacher-students are heads of departments and principals. Some teacher-students have been teaching for decades, others have limited teaching experience. A few work in relatively well-resourced conditions, while others work in schools with limited access to even basic amenities such as water and electricity, never mind learning materials.
- **Diversity of academic experience and knowledge.** While a few educators have academic experience - one even with a Master's degree, most have enrolled in a university for the first time. They received their pre-service education in rural teacher

training colleges, which placed little emphasis on subject knowledge and a high value on the educational perspectives of fundamental pedagogics and behaviourism. Thus many arrive with the expectation of receiving an educational 'quick fix' or 'tips for teachers', or are motivated by the prospect of a prestigious certificate and salary increase. Others, though dedicated and committed to improving their classroom practice, do not always have a clear understanding of the demands that studying at a university places on them, so are unprepared for the intensive academic and time input required.

- **Diversity of access regarding technological and educational resources.** While a few teacher-students have access to computers, telephones, photocopying machines, libraries, book shops and cars, the majority do not. Some even struggle to find paper on which to write their assignments. This diversity requires specific support as it relates directly to basic needs required for student success.
- **Linguistic diversity.** Students have diverse home languages covering most of the official languages of South Africa, including South African Sign Language. Many use English as a second, third and sometimes even fourth language. This directly affects how successfully a student can interact with learning materials written in English or take part in discussions.
- **Emotional and motivational diversity.** Within the current climate of rapid and confusing change in educational policies and practices, many teacher-students exhibit symptoms of high stress, demoralization, depression and confusion. They are overwhelmed by the pace of change and feel their role as professional practitioners has been eroded and undermined. As a student wrote in a portfolio activity:

> As a Curriculum 2005 student, I paid a visit to some of my colleagues. That is where I observed the following: they are very dishonest when coming to honour time because of their hesitance towards their lesson introduction. They feel unsure. They feel empty. They would rather give learners instructions for how to find learning for themselves. And thus the noisy scenarios (as described by Jansen) are created.

Quality Criterion	**2.1**	The provider has developed a learner profile that identifies the characteristics and situation of distance education learners.

Accommodating and supporting the needs of a diverse student population as promoted in current inclusive education policy is complex enough in a contact programme. When done at a distance, there are additional complications. Although students have the freedom to study at the pace that is most suitable to them, they may not necessarily have the skills to manage their learning situation. As Bertram argues (2003: 75), on the one hand, 'responsibility for turning public information in the Learning Guide into private knowledge lies firmly with the students'. But on the other hand, 'students who have previously been denied access (because of apartheid laws, lack of qualifications, lack of finances or because they were living in areas remote from a university) are the very students who would most benefit from strong support from lecturers and fellow students' (2003:76).

We have thus instituted a range of support mechanisms so that we can promote real learning and success for our students, both academically and professionally.

Socialization into academic practice

Quality Criterion	**7.7**	Tutor training places particular emphasis on equipping tutors to analyze and assist learners with language and learning difficulties.

The core of the academic challenge is the large number of students who are 'under-prepared for specific tasks' (Craig, 2001:50). This under-preparedness for academic work manifests in several interconnected ways. Teacher-students struggle with the level of academic literacy in English required by the learning materials. When reading, they find it difficult to recognize different opinions or arguments and counter arguments in a text. They understand assignment writing as summarizing or paraphrasing the learning materials, and they do not plan for the time it takes to re-read texts or write several drafts. So the Wits ACE takes on the challenge of developing the skills needed for access to higher education.

Academic Support at a Distance

Quality Criterion	**5.**	The content, assessment, and teaching and learning approaches in the course materials support the aims and learning outcomes; the materials are accessibly presented; they teach in a coherent way that engages the learners.

The starting point for any distance education programme is the quality of the learning materials. There is no space in this case-study to describe the materials we use in detail, but it has been said that the SAIDE and Wits learning materials are comprehensive, accessibly written, clearly structured, interactive, and encourage reflection on the text as well as reflection on teaching experience in the light of the text. Without this baseline, our academic support work would not be able to focus on mediation and extension in the way that it does.

We provide a framework for developing habits of study

Quality Criterion	**9.8**	Appropriate schedules are developed for all activities forming part of the distance education system, with due attention given to lead times needed to meet deadlines.

All modules provide a study plan that structures the timing and sequence of students' educational progress. Students who manage their time in accordance with this plan spend about fourteen hours studying per week (seven hours per module) and spread their studies evenly over the year. The study plan provides for a coherent encounter with the materials, with a steady build-up of knowledge and sufficient time dedicated to assignments and examination preparation. The introductory booklet gives examples for how these hours could be spread throughout the week for people with high energy in the mornings or for women who can only study after their children are in bed, and also includes group study time. This enables many students to manage their time and develop regular study habits. Of course there are always a few students frantically finishing off their assignments at lunchtime on the first day of the contact session, but because the norm is set by the study plan and late assignments are penalized, they are in the minority.

Quality Criterion	**6.1**	Assessment is recognized as a key motivator of learning and an integral part of the teaching and learning process.

In accordance with the study plan, students write weekly portfolio activities, two assignments and an examination or examination -equivalent project. The portfolio activities require students to give a written response to what they are reading, developing a habit of writing that explores ideas. The portfolios also serve as drafts for assignments. Students receive formative feedback, but no marks. The assignments are marked and count 50% towards the module mark.

We provide scaffolded assignments

Assignment tasks have detailed instructions and clear assessment criteria. Instructions provide not only the essay topic, but also a possible structure for the essay, a reason for why that structure is useful, and notes about what is part of the task and what is not. This scaffolding makes explicit the academic skills that are required. For example, a note in the second education assignment reads:

> Whenever you have a complex essay topic like this, you need to work out for yourself what the sub-questions are that need to be answered. In order to 'critically analyze' the topic, you need to first describe, explain, compare and demonstrate understanding of the topic. Then you can go on to make the links with other readings and your experience, analyze the implications and state your evaluations. So, as this is your first essay assignment, here are some sub-questions that might help you to think about the topic and to structure your essay. Please integrate them into your essay - they are not a list of questions to answer.

Notes like this one clearly state the academic processes and conventions that are often assumed and hidden. Assignments also contain assessment criteria we use for marking, in the format of a grid or rubric. Students are required to assess themselves in the light of these criteria before handing in the assignment, so that they are pushed into engaging with the criteria and encouraged to reflect on their own writing. In particular, the criteria give them a sense of what they are striving towards, of what counts as good practice in academic writing. The criteria are separated by content and form (Craig 2001: 47), spelling out what is required for a qualitatively better piece of work in each category.

We have found a tendency for weak students to overestimate and strong students to underestimate the quality of their work in relation to the criteria. Nevertheless, as the students come to understand the criteria from the inside over two years of study, they grow towards an increasingly realistic self-assessment. The ability to take a step back and reflect on their work rather than just handing it over to the marker is a valuable aspect of metacognition.

We provide dialogical feedback

We consider written feedback for each student a non-negotiable aspect of the marker's work. In addition, for each assignment, we send out general feedback letters that engage with common issues. The feedback has several components: it clarifies common misconceptions in relation to the assignment topic; it comments on what students have achieved in the light of the criteria; and it emphasizes aspects of academic literacy that we think students are now ready to understand. Of course we also encourage students, but our first purpose is to give cognitive feedback.

We are experimenting with different forms of individual feedback, so that it is less onerous on us and there is more reliability between markers. For example, for portfolio activities we have devised individual feedback sheets which allow markers simply to tick whether a student has understood the core content of an answer fully, partially or not at all. Then students can review their answers against the learning materials or a general feedback letter. This also gives us insight into patterns of answers, which in turn feeds into an ongoing adjustment of our materials and teaching.

Feedback is an influential aspect of dialogue between old timers and newcomers in a community of practice. Students have told us that their writing improved simply because for the first time in their lives they knew their work was being read properly.

Quality Criterion

6.13 Marking procedures for both formative and summative assessment ensure consistency and accuracy of marking, grading, and the provision of feedback to learners.

Academic Support during Contact Sessions

The contact sessions aim to introduce new ideas, clarify students' misconceptions and model the processes of academic learning. There are lectures to introduce and highlight important aspects of new topic areas, videos to ground theoretical ideas in teachers' practice, and tutorials for guided discussions.

Quality Criterion

7.10 Contact sessions are integrated into the course design, rather than being an add-on extra.

Students reflect on content knowledge

Lectures and tutorials during contact sessions are not a repetition or summary of the learning materials. Instead, work done is premised on the expectation that students have done their reading. In other words, students cannot come to the residential, take notes and get everything they need for the examination. Instead, they need to engage in activities, discuss problems, reflect on their practice and work with what they have read.

Quality Criterion

4.11 Teaching, learning and assessment activities encourage critical thinking and independent learning.

One way in which we encourage reflection, is to work a great deal with questions. The tutor and learning tasks use questions to stimulate reflections. In addition, there is a focus on questions asked by the students. At the beginning of each residential there is time allocated for students to ask questions of clarification or exploration about what they have read in the learning materials. Without these questions, no input is given. In this way, even when the tutor is present and working with students, it is clear that students take responsibility for their share of the learning.

Another way we encourage reflection is through structured group tasks that require making connection between the readings and classroom practice. For example, students act out and analyze lesson transcripts or videos of lesson extracts. They plan a possible sequence of assessment tasks. They discuss manifestations of the hidden curriculum in their own schools. One source of heated argumentation is always Curriculum 2005, with students veering from

Quality Criterion	4.12	The teaching and learning strategies of the course acknowledge learners' existing knowledge and experience, and provide opportunities for guided integration of new knowledge.

adamant advocacy to endless complaint. So discussions of Curriculum 2005 offer ideal opportunities to show the complexity of educational issues and how theory can illuminate practice. As much as possible, activities during contact sessions model the reflective cycle of theory and practice. Tutors work with students to bridge the gap between experiential anecdotes on the one hand and sophisticated sounding educational jargon on the other.

A third way we encourage reflection is to 'unpack' the language of policy documents and current political discourse. We achieve this through examples and activities provided in the learning materials as well as through case studies, practical examples, and teaching of specific skills within a problem-solving framework. For example, we discuss what it might mean to provide 'support to overcome barriers to learning.' The term 'support' has become an educational buzzword. Policy documents talk about '*School/Site-Based Support Teams*' and '*District Support Teams*', '*learners in need of support*' and at school-level, teachers are constantly being told to '*support*' their learners and need to complete forms where they explain the *type of support the learner needs*, the *support provision already offered*, and the *effects of the support* that have been provided. We explore the concept of different types of support through the eco-systemic approach to understanding learning differences and types of support that would be appropriate for, and appreciated by different learners in different circumstances. We also model a 'culture of support', by offering teacher-students individualized support depending on their needs and the stressful life events facing them.

Students practise academic literacy

During contact sessions we also focus specifically on explaining and giving students practise in academic skills. For example, students are shown techniques for approaching articles or how to ask themselves questions while they are reading. They practise recognizing an author's argument and making links to what other authors are saying. They learn about qualities of academic argument and practise rewriting paragraphs to make claims more logical or substantiated by evidence. They discuss how to acquire specialized academic language without falling into the trap of plagiarism. They learn how to write-up classroom research projects and how to present their work in well-ordered files. With all these activities, our intention is to gradually make academic conventions explicit, thus providing a conscious process for acquiring the cognitive skills needed to cope in a world of written knowledge.

Making resources of a university available

Quality Criterion	7.17	Learners have access to the facilities (for example, libraries) and equipment that are necessary for their successful learning.

During contact sessions there is often little time or energy left for students to explore the broader aspects of the university. Nevertheless, we fit in at least one session per year that requires research in the library. We draw on the Writing Centre to offer individual support to students whose writing is weak. The Science specialization introduces students to computers and the Internet. We lift the heaviness of intellectual work by organizing a visit to the planetarium, distributing information about shows at the Wits Theatre and inviting jazz musicians to perform during lunchtime.

Modelling educational practice

We believe that students learn at least as much, if not more, from what we do rather than from what we say. So during the contact sessions, we consciously model the kinds of practices that we hope to inculcate in our teacher-students.

For example, we deliberately face the challenge of managing diversity. We know that teachers have to teach learners with diverse abilities and backgrounds in their classrooms, yet modelling how to do this in an overcrowded classroom provides us with a challenge. On the one hand, we know it is in the best interest of students to have smaller tutorial groups with greater individualized support. On the other hand, our concern is that small group teaching is often not an option for teachers in their own classrooms. So we have opted for teaching several of the sessions with all the students together in an 'overcrowded classroom' and have then modelled group work methods, innovative tasks and classroom management strategies that can be implemented in school classrooms.

This approach has confronted us with disturbing social and moral issues that also occur in overcrowded school classrooms. For example, academic theory informs us that learners from deprived backgrounds are more likely to fear failure and take steps to ensure their success through non-conventional methods than those who come from more privileged backgrounds. We experienced this when a textbook on loan to a particular study group was stolen during a tutorial session. Instead of showing our dismay at this act and 'punishing' the entire class by taking away all textbooks on loan, we used this example as a means of demonstrating how a teacher could deal with this behaviour in a classroom setting. We discussed the incident in detail and linked theory to actions and feelings to practice (praxis). In so doing we managed to diffuse a volatile situation and discover more about our teacher-students' perceived needs and motivations. While we never did discover who had taken the book and it was never returned, this incident and the way it was managed was exciting and we have experienced no further thefts since then.

Our modelling approach also requires that we take time to develop students' cognitive and meta-cognitive awareness. We need to make explicit the theoretical thinking behind the carefully-developed and sometimes unconventional strategies we use. Activities that have worked well in developing links between knowledge and practice include a 'salad activity', during which students make a fresh salad as an illustration of the diversity and unity envisaged in the policy of inclusion and a 'bridge-building activity' in which students assist each other verbally on how to build a bridge with straws, thus illustrating the concept of mediation. This has led to laughter, heated discussions, and numerous revisions of strategy and planning.

Taking care to model good teaching practice is based on the understanding that what *we do and how we succeed* will have important implications for how teachers in classrooms around the country make use of limited resources to provide their own learners with support aimed at accommodating diversity.

Encouraging communities of learning

Collegiality, collaboration and supportive communities are increasingly acknowledged as critical elements in teacher development. Collaborative support can encourage innovation, boost teacher confidence, foster professional enthusiasm and more importantly, reduce the teacher's isolation. The ACE students are not only learners at university, they are also life-long learners in their jobs and professional communities. So we make an effort to link studies and professional development.

Quality Criterion	7.1	Learners are encouraged to create and participate in 'communities of learning' in which the individual learner thinks and solves problems with others engaged in similar tasks. This is facilitated through a range of learner support mechanisms - peer support sessions, tutorials/contact sessions, teaching on assignments, support in the workplace (mentoring), email and Internet communications, for example.

Firstly, we ensure that all students have one or more study partners. We encourage them to meet regularly, show them how to prepare for study meetings and accept the occasional jointly written portfolio activity. Many teacher-students have expressed frustrations related to lack of support and, in some cases, sabotage from their colleagues and seniors in their schools. So the peer support provided by fellow students is crucial for their morale.

Secondly, we try to build a support base for the teachers in their identity as professionals, mainly through cluster workshops and affiliation to Science/ Mathematics associations.

During 2003 we ran three one-day cluster workshops for Science teachers from the same school districts. The teachers worked together on different Science themes using micro-science kits. With assistance from tutors they used the new curriculum statements, micro-science activities and Science textbooks to develop two-week learning and teaching programmes. Teachers from each cluster nominated a leader teacher, were allocated a budget and committed themselves to organizing and running a workshop for other teachers in order to present their learning and teaching programmes. Due to budgetary constraints, these teacher-led workshops have not yet happened, but they are still in the pipeline.

In 2004, it was proposed that the Mathematics teachers become affiliated to the Association for Mathematics Education of South Africa (AMESA) to ensure their continual engagement with professional learning. But efforts to identify a Science educators' association are proving to be difficult, as most of the science associations do not cater for primary school teachers.

Enabling access and success for a particular group of students - the Deaf

The National Commission on Special Needs in Education and Training (NCSNET) and the National Committee for Education Support Services (NCESS) state that learners with special needs can be provided for in an inclusion model by designing an inclusive context or setting in such a way that the barriers to the students' education are removed.

The Wits ACE is catering for Deaf students by taking a bilingual approach to meeting their communicative needs. Including Deaf students into a mainstream class requires the inclusion of South African sign language and we thus provide sign language interpreters for Deaf students and Deaf teaching staff. Sign language interpreters are essential if Deaf students are to have full access to the knowledge provided and thus an equal chance of success.

The role of a sign language interpreter

Using sign language interpreters has involved a learning process for teaching staff on the ACE. We have learned about the role of the interpreter, the process of interpretation and we have needed to change some of our teaching practices to accommodate Deaf students.

Interpreting is a profession and sign language interpreters are qualified for different contexts, such as church, court, social functions, schools and institutions of higher learning. The Deaf Federation of South Africa has a pool of sign language interpreters available for different situations. The role of a sign language interpreter is to facilitate communication between individuals who do not share a common language. The interpreter neither speaks for, nor in place of, Deaf people, but serves only as a conduit for message transmission.

Message transmission through the use of sign language takes longer than direct verbal communication between hearing teaching staff and learners. Sign language occurs in the visual-gestural modality, while spoken languages occur in the aural-oral modality. There is an interpreting process between the two languages in the minds of Deaf teacher-students that needs to be accommodated.

Let us see how the process works:

- The lecturer speaks;
- The South African sign language interpreter hears words;
- She internalizes and understand the meaning;
- She picks the appropriate way to say the message in sign language;
- She signs;
- The Deaf student sees the signs;
- The Deaf student makes sense of the sentence and understands the meaning.

Then:

- The Deaf student signs;
- The interpreter sees his/her signs;
- The interpreter internalizes and understands the meaning;
- The interpreter picks the appropriate way to say the message in spoken language;
- She speaks;
- The lecturer hears the words;
- The lecturer makes sense out of the sentence and understands the meaning.

From this brief description of the role of a sign language interpreter, we have begun to understand that:

1. The process of interpreting can be very tiring. Research has indicated that at a fast pace the interpreter can process about 20,000 words per hour, that interpreting is a cognitively challenging process, and that interpreters and Deaf teacher-students or Deaf teaching staff need 'mental breaks' at 45 minute intervals. Research has also revealed that for whole day intensive teaching and learning situations there is a need for more than one interpreter.
2. Due to mental processing, there is a slight delay as the message is passed from one language to another and it is important that teaching staff and teacher-students understand and respect the role of an interpreter as both use the service to facilitate communication between them.

This has meant that teaching staff need to bear in mind the following:

- An interpreter should not be used as a teacher, tutor, editor, mentor or classroom assistant;
- Staff should address Deaf students directly - not the interpreter;
- Interpreters should not be involved in discussions;
- Allow the interpreter to finish the message;
- Pause while the Deaf students look at visual aids.

In addition, staff need to learn how to make use of an interpreter during class discussions. As an interpreter can only interpret one message at time, staff must ensure that only one student speaks at a time. Physical positioning is crucial: the interpreter needs to stand close to any visual aids so that deaf students can refer to both quickly and easily. When videos are shown, it often requires two interpreters so that voice-over communication can be distinguished from the people seen on the screen.

Note-takers and additional time

Additional support structures that we have not yet managed to put in place are, for example, note-takers for Deaf student-teachers. The speed at which lectures are conducted and the fact that Deaf students cannot look down to write because they have to look at the interpreter all the time makes it impossible for them to write their own notes. This problem is compounded when lecturers use overhead projectors. During discussions we may use a slower pace to allow for deaf students to participate, but it becomes difficult to ask hearing students to wait while deaf students write notes, highlighting the value that this support could contribute to the learning experience.

In addition, Deaf students often require extra time during examinations or tests, once again as a result of the translation process and the difference between spoken/written language and sign language. Deaf students do not have natural exposure to the written language and thus find understanding and responding to written text a time-consuming process.

Organizing a counselling service for personal support

A prevalent special educational need among students at higher education institutions is coping with stress and stress-related difficulties. In particular, adult students are faced with stressful situations in their personal and work lives. Once they add the pressure of studying to their lives, it creates new stresses, often magnifying existing stresses and allowing less time in their lives to deal with problems. It is generally accepted that stress has an inhibitory effect on thought processing, which results in inability to think clearly or the avoidance of thinking at all. So if we want our students to experience academic success, we need to provide a service to relieve some of the stress.

Quality Criterion	**7.13**	Learners have access to counselling for personal difficulties/advice related to their study before and during their course or programme, as well as after its completion.

The Wits Counselling and Careers Development Unit, staffed by professional psychologists and student-peer counsellors, is unable to support the distance students because its service is on a different campus, has a long waiting list and does not operate during the holidays. So we have organized a counselling service that relies on full-time students studying for a Masters Degree in Educational Psychology (M Ed). As they require 30 hours of counselling experience as part of their Masters programme, they can accumulate these hours by offering counselling to the distance students. Masters students are not yet professionals in their own right, so they receive support from their lecturers who provide debriefing and supervision after each counselling session. The Masters students are trained to listen, to identify problem areas needing immediate attention and to support the counsellee in their problem-solving. This allows the person seeking help to think aloud, and during that process, movement in thought is stimulated or asserted. Our experience is that most counselled students end the session in a problem-solving phase, which indicates unlocking of thought inhibition, which is the primary goal of our counselling service.

During 2003, 20 to 30 students came for counselling during each contact session. Not all students could be accommodated, so priority was given to students coming from rural and semi-rural areas where there are no counselling services, while those from areas with services were referred to appropriate centres. 95 % were women, which reflects the nature of the student population. A breakdown of the nature of problems presented in counselling revealed that 30% were cases of abuse by husbands, 20% were marital, family and relationship problems, 20% bereavement and illness, 10% academic difficulties, 10% financial problems and 10% depression emanating from childhood abuse and neglect.

Traditionally counselling is viewed as a process that involves consultation over a number of successive sessions. This view of counselling does not consider the one-off counselling sessions as offered to distance students to be an effective form of counselling. Nevertheless, we have noticed a positive impact and improvement in students who were exposed to the service. As one student wrote:

> To the organizers. Thank you for organizing therapy sessions for students, really we can see that you care for your students. You are not only interested in keeping more students in your university to keep it going, but you also have shown care and support for us through your personal lives. From RRRR

We therefore operate from the premise that although several successive counselling sessions might be the ideal, one session within a hectic contact session is still effective.

Conclusion

In writing this case study as a collaborative effort, we were struck by the diversity of approaches across subject specializations and by the complexity of what we are trying to achieve. This diversity of support structures makes up the richness and value of what it means to have access and, hopefully, also success in studying for an ACE at Wits.

Secondly, we noticed how much of the support takes place during the short contact sessions. It seems that in order to ensure success we are skewing the mixed-mode of delivery more towards contact than towards distance. It might be useful to use Bernstein's concept of classification to explore this idea more deeply. It seems that what we are doing on the Wits ACE is to weaken the boundaries of the classification between distance and contact modes of teaching. Bernstein describes classification as the relations between educational categories and states that 'the stronger the insulation between categories, the stronger the boundary between one category and another and the more defined the space that any category occupies and to which it is specialized' (1996:23). Modes of distance and contact teaching are often strongly classified in South Africa - they are considered to be different modes of teaching and learning, receive very different levels of subsidy from the state and are explicitly assigned to different institutions. The pre-conception is that distance mode depends on input from and interaction with learning materials, while contact mode depends on input from and interaction with the educator and student peers. Distance is pre-set, rigid and structured, while contact is flexible and adaptable to student needs. Distance is low-quality, while contact is high-quality education. But it seems to us that on the Wits ACE we are weakening the boundaries between this classification by using high-quality aspects of both modes. Students' prime sources of information are clear and interactive learning materials, but tutors and lecturers work in the classroom to make knowledge in those materials accessible and meaningful to particular groups of students.

In the process though, our conceptions of what counts as teaching are changing. We are adjusting our classroom interactions so as to focus more on strengthening the skills of learning and reflection. We take care to model and create spaces for professional development. We put in place support structures like counselling and interpreters that create the inner and outer possibilities for students to learn.

Thirdly, we acknowledge the fragile state of student success on the ACE programme. Without creative effort and constant adjustment of means of support put in by the teaching staff, and their insistence on utilizing the resources of the university in new ways to satisfy needs of these non-traditional students, the students would find it far more difficult to achieve success. Translating the promise of access into success depends not only on the willingness of students to sacrifice an easier life in order to commit to their studies, but also depends on the willingness of university staff and structures to find appropriate mechanisms of support.

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Endnotes

[1] Curriculum: From Plans to Practices, Creating People-Centred Schools, Learners and Learning

[2] We are using the term 'teacher-students' to indicate that our students are all practising teachers who have decided to study part-time at the university. We are not using the term 'educator' as we agree with the Ministerial Committee on Teacher Education that it is a more precise use of language to refer to 'teachers' when talking about classroom-based teachers and 'educators' when referring to everybody involved in education. http://education.pwv.gov.za/DoE_Sites/Curriculum/Ne... language_and_terminology.ht)

Case Two: Addressing the needs of learners and addressing the needs of the nation: a module in UNISA's BA in Court Interpreting

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Editor's introduction

This case study describes a module which addresses the needs of a 'non-traditional' learner constituency: court interpreters with limited academic background but substantial work experience. The module and larger qualification of which it is a part, respond to quality criterion 3 on **programme development**:

> Programmes are flexible and designed with national needs as well as the needs of prospective learners and employers in mind.

An unusual feature of the module, in a distance learning context, is the teaching and **assessment** of oral interpreting skills from one language to another. This is done through extensive use of audiocassettes for both teaching and assessment purposes. Examples of assessment criteria developed for the assessment of module outcomes are included in the final section of the case.

Background to the development of the module *Liaison and Consecutive Interpreting*

In many countries, while a range of languages might be used in a courtroom, interpreting is likely to be needed in only a very small number of court cases. South Africa is unusual in that the *majority* of court cases require interpreting. In magistrates' courts, where the majority of criminal cases are heard, about 90% of court cases require interpreting, at least in Gauteng, the most multilingual province. Even in post-apartheid South Africa, English and Afrikaans still function as the *de facto* official languages of court proceedings, and English is the official language of record, which means that those who do not speak English and/or Afrikaans are compelled to make use of interpreting services in exercising their right to be tried in their own language. The Department of Justice therefore employs around 2 500 court interpreters (mostly male) on a full-time basis, and a number of part-time interpreters, mainly for foreign languages. Most interpreters are assigned to particular courtrooms, where they interpret every case brought before that court. In a normal day, the South African court interpreter might be required to interpret in five African languages plus English and Afrikaans.

Given the enormous challenges facing the court interpreter in South Africa, and sheer numbers of interpreters employed full-time by the Department of Justice, the Commission for Conciliation, Mediation and Arbitration, and South African National Defence Force, one would expect training of court interpreters to be given a high priority. Unfortunately, this has not been the case. Historically, court interpreters had a low standard of education, at best a poor Grade 12 qualification and at worst, only a Grade 10 qualification. After selection and appointment as court interpreters, they were (and still are) provided with a six-week training course by the Justice College, a division of the Department of Justice. This training course is supposed to take place before the court interpreter is assigned to a particular court, but in some instances, court interpreters wait for up to five years before attending the course, and therefore must acquire any interpreting expertise through self-training. With the advent of learnerships through SETAs, it is to be hoped that this situation will change. In the past, prospects for professionalization, career advancement, recognition for excellent services or opportunities for following extra training courses in court interpreting were negligible. The only avenue upwards was to study law, and thereby leave the court interpreting service. This clearly unacceptable situation prompted court interpreter unions and representatives of the Department of Justice to consult with a number of academic institutions regarding the possibility of a more comprehensive training programme. In response to this, in 2000 the University of South Africa (UNISA) introduced a Bachelor of Arts degree with specialization in Court Interpreting (BACT), in line with the tenets of outcomes-based education. Roughly one third of the modules for the programme are devoted to interpreting, one third to language and one third to law modules. The latter are offered through the Faculty of Law and provide students with some credits towards an LLB degree. The Department of Justice issues bursaries to any full-time employees who wish to enrol for the degree.

The module, *Liasion and Consecutive Interpreting*, and indeed the BA with Specialization in Court Interpreting, has been designed to meet very specific needs of society. It is vital that this module and others in the specialization be offered in distance learning mode because South African court interpreters, who are employed full-time in courts throughout the country, cannot easily travel to attend courses at residential universities in the cities. It is equally relevant for other countries in Africa, with similar requirements related to court interpreting. This BA programme is currently the **only avenue of training** for court interpreters in South Africa, since a number of South African universities, which used to offer such training, have now ceased to do so.

Quality Criterion		
	3.1	The programme is developed in terms of a needs analysis based on an audit of existing courses and programmes, market research, liaison (where appropriate) with industry and professions, national and regional priorities, and the needs of the learners.

Learner profile and learner needs

Most of the students currently registered for the BA in Court Interpreting are practising court interpreters, who require theoretical and practical skills to reinforce their existing practical experience in court, and who also need to be exposed to practical interpreting situations outside the courtroom so as to open up other avenues in terms of freelance job opportunities in interpreting. (Full-time court interpreters are currently not well-paid.) Students with no previous professional exposure to interpreting, but with experience in less formal settings such as church, health, tourism or other liaison contexts, are in the minority. These students need to learn both practical interpreting skills as well as certain theoretical aspects of interpreting. As mentioned earlier, court interpreters do not receive training in interpreting skills, so this module addresses a very important need.

Currently, 88 students are registered for the degree. For the module outlined in this case study, there were 11 students in 2001 when the course was first offered, 23 in 2002, 17 in 2003 and there are 15 in 2004. To date, all of the students except one have been additional language speakers of English. The majority are full-time employees of the Department of Justice, aged over 35 years. Some students gained access to UNISA via the Senate over-23 years of age discretionary clause. Most come from disadvantaged backgrounds, but have passed language tests in order to be employed in the courts, and therefore are generally able to articulate coherently their ideas orally and in writing in their first language and additional language(s) (English and/or another language). They are generally adequately prepared for the module, although very few have ever studied at tertiary level. A minority of students are additional language speakers of English, but with foreign languages (French, Spanish, Italian, Chinese) as their first language.

Quality Criterion	**2.** There is up-to-date information about past, present and potential learners.

The module

Principles of Interpreting II: Liaison and Consecutive Interpreting (PIN201-U) is a second year module, National Qualifications Framework (NQF) Level 6, offered by the Linguistics Department in the Faculty of Humanities and Social Sciences at UNISA. The duration is one semester and is part of the BA (with Specialization in Court Interpreting). It can also be taken as an elective by BA (Languages & Literature) students.

The word liaison means 'link' in French, and thus the term refers to the type of interpreting that takes place in a number of different settings where two or more interlocutors do not share a language and where the interpreter must be present in order to bridge the communication gap. Gentile *et al* (1996: 1) support the use of this term as follows:

> We use the term 'liaison interpreting' to refer to a growing area of interpreting throughout the world: in business settings, where executives from different cultures and languages meet each other; in meetings between a society's legal, medical, educational and welfare institutions and its immigrants who speak a different language; in relations between a dominant society and indigenous peoples speaking different languages; in a whole host of less formal situations in tourism, education and cultural contexts.

While the module is part of a learning programme for court interpreters, it teaches practical interpreting skills independently of setting; therefore learners who are not court interpreters, but are involved in other kinds of liaison interpreting can register for it for non-degree purposes. What makes this module unusual in a distance learning context is the fact that oral interpreting skills from one language to another are taught and tested.

Given the fact that most students registering for the programme are already working in courts as interpreters, one aim of the programme is to increase their awareness of tasks they are faced with every day and to improve their ability to reflect upon the realities of court interpreting. A purely theoretical course which deals with the standard do's and don't's in interpreting and which produces students who can only parrot idealized rules without being able to solve problems and real-life situations themselves, would be of very little use. In court, interpreters are constantly faced with contradictions between ideal conditions and actual conditions, between idealized notions of performance and actual constraints. It is also hoped that some of the most motivated graduates of the programme might study further to become inspectors or managers of interpreters in the future.

As most students do not have access to a computer, the module makes use of print-based materials and audio cassettes. It has been designed so that learning of concepts is reinforced through the completion of written activities and tasks contained in a workbook. With guidance, learners are expected to analyze and think critically about the liaison interpreting process and be able to apply this knowledge to given texts which typify specific liaison interpreting situations and/or to their own practical experience. Learners must be able to structure their answers in the form of paragraphs and/ or short essays. As they work through the module, all learners receive in-text support as in the form of detailed feedback on all activities. In addition, two optional five hour workshops are held in Pretoria and in 2003, one such workshop was also held in Polokwane. The Pretoria workshops have been well-attended, but the first Polokwane workshop was not.

As regards the oral practical interpreting skills, this is a skills-based module, so extensive use is made of audio-cassettes for oral tasks. Learners are required to listen to an interview or monologue in English recorded on a UNISA cassette and interpret it into their first language onto their own cassette (which is assessed and returned to the student).

Successful learners are able to demonstrate practical interpreting skills and apply these skills professionally to liaison interpreting settings in the legal, health and business contexts. With limited guidance, learners are expected to be able to interpret competently in the short consecutive mode *without notes* (two to three sentences at a time for approximately 15 minutes in total) as well as being able to competently interpret a narrative/descriptive text of approximately 500 words at sight (i.e. from written text to oral mode) from second language into first language. With guidance, learners are expected to be able to interpret in the short consecutive mode *with notes* (three to four sentences at a time for approximately 15 minutes in total) and interpret a basic narrative/ descriptive text of approximately 500 words in the long consecutive mode *with notes* from second language into first language.

Quality Criterion	11.6	There are demonstrable processes and ongoing efforts to improve the quality of teaching and learning according to priorities identified through monitoring and staff evaluation.

In 2003 the tutorial letter for the module was quality assured to assess its suitability for transformation into a study guide. Participants in this quality assurance process were a representative from UNISA's Bureau for Learning Development, the course leader, members of the Linguistics Department and an external critical reader. As a result, the layout of the tutorial letter was revised and the content of the course more closely aligned with the intended module outcomes. The two audio-cassettes that accompany the module were also revised, with greater inclusion of relevant topics (health, education, legal matters for example) and more interviews or dialogues.The language used on the tape is extemporaneous speech as far as possible, since this is easier to interpret than prepared speeches which are denser in terms of terminology and are delivered at a faster pace.

Formative and summative assessment

UNISA staff members assess all theoretical work plus Afrikaans-English, English-Afrikaans, French-English and German-English interpreting work and a number of outside markers assess the practical interpreting work in other language combinations (Spanish, Italian, isiZulu, XiTsonga, Sepedi, Setswana, Sesotho, Arabic, Portuguese, isiXhosa, Tshivenda, for example).

Because the module aims at teaching practical skills as well as theoretical principles, it is vital that the students work consistently throughout the semester. For this reason, there is a structured programme of self-assessment (Assignment 1), consisting of activities in the workbook (both oral and written) which learners can work through at their own pace.

In addition, **written assessment** (which counts 50% of the final mark for the module) consists of a written examination plus a written assignment (Assignment 2) which tests learners' ability to critically reflect on the liaison interpreting process and to express themselves in an academically appropriate way. They are required to read the material critically, synthesize information and express their answers in the form of paragraph-type questions.

Quality Criterion	6.4	There is a range of formative and summative assessment tasks and methods which ensure that all learning outcomes are validly assessed.

Assessment of oral skills (which counts 50% of the final mark for the module) consists of an oral, taped assignment (Assignment 3) and an oral, taped take-home examination (Assignment 4) which tests learners' ability to interpret consecutively with and without note-taking. Assignments 2 and 3 together count 20% towards the final examination mark for the module.

Quality Criterion	6.13	Marking procedures for both formative and summative assessment ensure consistency and accuracy of marking, grading, and provision of feedback to learners.

Learners are provided with detailed feedback for both the self-assessment assignment (Assignment 1) in the form of model answers and for the marked assignments (Assignments 2 and 3). Assessors use an outcomes-based assessment grid for both written and oral tasks. The emphasis in marking oral tasks is not on marking learners' interpretations as simply good or bad, but in helping learners to identify their strengths and weaknesses in particular areas.

This system is based on four criteria, namely:

1. Accuracy - the correct transfer of information and evidence of complete understanding;
2. Absence of misinterpretations - where the meaning of the source language (SL) is lost;
3. Appropriate choice of vocabulary, idiom, terminology and register;
4. Grammar and coherence of the target language (TL) message;
5. Interpreting technique and performance.

The following is an example of the marking system used for undergraduate interpreting tasks.

Outcome 1: Accuracy of message

(Transfer of information, including dates, names, figures etc.)

Outcome not achieved (0)	Outcome achieved (+1)	Outcome exceeded (+2)	Distinction (+3)
Inadequate. Some understanding of message. But a number of minor errors and occasional major errors lead to false transfer of information.	**Adequate.** No major errors. Some minor errors may be present.	**Good.** No major errors.Less than 2 minor errors.	**Excellent.** No major or minor errors. Totally accurate transfer of information.

Outcome 2: Vocabulary, Idiom, Register, Purity in target language (TL)

Outcome not achieved (0)	Outcome achieved (+1)	Outcome exceeded (+2)	Distinction (+3)
Inadequate. Number of clumsy or inappropriate renderings which seriously impair/ distort the message. Little/ no sense of register.	**Adequate.** Some peculiarities but will not impair overall acceptability of message. Some incorrect choice of register and idiom.	**Good.** Vocabulary, terminology and idiom are appropriate throughout. Register is mostly appropriate	**Excellent.** Language and register entirely appropriate to subject matter and intention of original.

Outcome 3: Grammar and Cohererence in TL

Outcome not achieved (0)	Outcome achieved (+1)	Outcome exceeded (+2)	Distinction (+3)
Inadequate. Blatant grammar errors. Inappropriate structural features. Does not read as original. Stilted/ incoherent; far too literal rendering of structure of SL.	**Adequate.** Some grammar errors present. Structure is sound, but there may be some awkwardness or lack of coherence which makes the translation stilted in some parts.	**Good.** Near-perfect grammar. Structure and organization are sound; coherent links between ideas.	**Excellent.** Grammar perfect. Fluent and natural expression in target language. Sounds like an original message. Structure, links and discourse organization are all entirely appropriate to TL.

Outcome 4: Interpreting technique and performance (presentation, confidence, fluency of delivery, hesitations, backtracking, irritating habits, etc)

Outcome not achieved (0)	Outcome achieved (+1)	Outcome exceeded (+2)	Distinction (+3)
Inadequate. Some major faults in technique, making interpretation unacceptable in professional terms.	**Adequate.** Correct in major technical elements but more than 2 faults in technique.	**Good.** Good public speaking skills; Less than 2 minor faults in technique.	**Excellent.** Faultless public speaking skills. No hesitations or irritating habits; absolutely fluent and confident delivery.

Ticks are made against the quality category achieved for each outcome, ranging from outcome not achieved to a distinction. Pass marks are awarded to those who achieve all four outcomes and distinctions to those who achieve distinctions for at least three outcomes. Marks are calculated as follows: each student starts off with seven marks out of 20 marks, and then the marks for outcomes 1, 2, 3 and 4 are added.

Quality Criterion	6.2	Assessment information (including learning outcomes, assessment criteria as well as assessment procedures and dates) is provided in all courses, modules or topics.

For example: 7/20 plus:

1 mark for Outcome Achieved (accuracy of message),

3 marks for Distinction (vocabulary, idiom, register, purity in TL),

2 marks for Outcome Exceeded (grammar and coherence in TL),

0 marks for Outcome Not Achieved (interpreting technique and performance).

Total: 7+1+3+2+0=13/20 = 65%

The detailed assessment procedure is helpful in promoting reliability across a range of markers, and is also helpful to the learners who have a good chance of understanding the reason for their mark, as well as in which areas they may need to improve.

Case Three: Engaging students online: a module in an international M Ed in Language and Literacy Education

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Editor's introduction

In the first part of this case study of an on-line M Ed module the author describes two forms of **collaborative relationship**: (i) among universities in South Africa, Australia and Canada and (ii) between a writer-teacher and specialists in web-based language. It illustrates Criterion 10:

> In the interests of cost-effective provision of education and training, collaborative relationships are formed and collaborative projects undertaken wherever possible.

The author then describes how interactive pedagogy, which has evolved through her many years of experience in face-to-face teaching, could be transferred productively to an on-line environment in which asynchronous discussion is central to learning for both students and their teacher. In particular, this description addresses element 5.5.7 of the criteria for course materials:

> Active learning and teaching approaches are used to engage learners intellectually and practically, and cater for individual needs.

The case study illustrates the integration of **course materials, learner support** and **assessment** in **course design** for online learning.

It still amazes me that I can sit in my study at home in Johannesburg, South Africa and teach my critical literacy course for the University of South Australia (UniSA[1]) in Adelaide, South Australia, to students registered for a Masters degree at Mount Saint Vincent University (MSVU) in Halifax, Nova Scotia, Canada, particularly as these Canadian students might live anywhere in Canada, or indeed in Saudi Arabia or Korea. The richness that is achieved by developing understanding across diverse contexts with students who are themselves diverse, enables exploration of local knowledges and practices in relation to global perspectives.

MSVU has a long tradition of work in the area of education and social justice, as has the Centre for Studies in Literacy, Policy and Learning Cultures (LPLC) at the University of South Australia

(UniSA). MSVU has sought to broaden the experience of its students by putting them in touch with academics with expertise in different aspects of literacy from across the world. To that end it has involved staff from the LPLC who teach at UniSA, one of the premier distance education institutions in Australia. In addition, the Centre collaborates with academics at other institutions in Australia and elsewhere to provide a rich menu of options in their Masters in Education in Language and Literacy Education. This programme for in-service teachers which uses a socio-cultural orientation to literacy, places emphasis on critical literacy - literacy education with a focus on issues of identity, power and social justice across different modalities of meaning-making (verbal, visual, gestural, spatial) using a range of media (including new digital media).

UniSA has invested in software needed for online teaching, developing its own programme that is user friendly for both teachers and learners. All a teacher has to do is to write the course and teach it. The teacher writes the course in MS Word based on knowledge of what the design of the website makes possible. The website is divided into

- Areas of input from the teacher: an introduction to the course, course information, course topics, resources;
- Live areas for interaction during the course: a noticeboard, a discussion area for each course topic and an area for pooling and sharing material.Each of these separate areas on the site has a hot-button on the home page and more than one area can be open at a time. Different software on the market (including the UniSA) software has different strengths and weaknesses. What matters is that specialists, who know the necessary web-based language, upload courses, leaving academic staff free to concentrate on the academic content and pedagogy. The only computer skills I need are MS Word, Internet and e-mail.

Quality Criterion	**5.6.6**	Support in the use of the various functions on the site is provided both in the site itself and from external technical assistance.

My course, *A Critical Language Awareness (CLA) Approach to Literacy Education*, is divided into three topics: The history of CLA; CLA in practice; Critical text analysis, and Critical discourse analysis. In writing the course I tried to strike a balance between providing information, guiding students' reading, and activities. I have tried to use my face-to-face experience to design activities that develop and scaffold students' understanding (Bruner, 1985) by using interactive activities and keeping information and definitions to a minimum. Additional input is provided online on the discussion sites if the students need it and only after students have had a chance to develop their understanding through the reading or the activities. The way this works in practice is that students are given activities to do and are required to post their work, their ideas or their findings on the discussion site for all to read. This forms the basis of an online discussion in which I participate as the teacher. Other activities require students to respond to other people's postings. This generates online discussion, which, by the end of the course, is established as an expected participative practice. In teaching the course I also generate further questions or ideas to encourage further discussion online.

The online discussion is at the heart of the pedagogy. This is much like any classroom discussion with some important differences:

- Every student has to contribute to the discussion and respond to fellow students.

- Responses are written, so tend to be more thoughtful than off-the-cuff oral contributions to discussions in face-to-face classes.
- Responses are more permanent (students are taught how to save discussion sites) and both students and the teacher can read postings on the site, think about them and return to re-read them. One activity asks students to review discussion on a topic and to list everything that they think has been learnt.
- The teacher can keep track of each individual's development as well as the class's progress.
- Students are disembodied, so that judgements about them are formed only on the basis of their work.
- Teachers can time their interventions more carefully and can vary between responding to individual postings or collectively to the class as a whole. All responses to all postings are available to everybody and everyone is expected to read everything that is posted. Everyone is encouraged to respond to any posting at any time.
- Responses can be threaded. There are two ways of posting on the site. You can start a new message at any time or you can reply to a posting. If you reply then the response appears as indented under the response you have replied to. In this way, all responses to one message or one idea can be kept together. This is called threading.

Quality Criterion	
5.5.8	Content is presented in the form of an unfolding argument, rather than discrete bits of information that have no obvious connection.

- It is possible to cut comments from a posting and paste them into your own posting so that you can comment specifically on what someone else has said, without having to re-type it.
- All discussion is asynchronous. I can go onto the site at any time to post new responses or to reply to existing responses. This means that everyone can work at a time of the day or week that suits them. Not only is this flexibility essential for mature students who have jobs and/or domestic responsibilities, but it also caters for time differences between Australia, South Africa, Canada and wherever else students might be located.

Course resources, such as academic articles that we have copyright permission to use online, appear in the resources section of the site; other such material, including prescribed texts, are sent to students by post. With each course, students receive a printed reading pack. They also receive a disc with software they need such as an Internet browser, a word processing programme and an e-mail package. Students are also encouraged to post additional resources - scanned texts, academic articles, classroom materials they develop as part of a course assignment, photographs, course essays, interesting URLs - onto the 'pool and share' part of the site. I often add material to the course here.

Quality Criterion	
5.5.4	The content of the course is accurate and up-to-date.

This enables me to keep the course current and to add resources in relation to students' needs and interests and in relation to how discussion develops, making the course organic rather than static.

Quality Criterion

5.5.10 Course materials are designed in an accessible way. Access devices (such as contents pages, headings), graphic presentation of information and layout facilitate use by the target learners.

Passwords control access to the site. Teachers and students have differential access. In addition to the topics, course information, discussion and resource sites that the students have access to, teachers can also post messages on the notice board, which is used to manage the course with, for example, instructions pertaining to assignments, procedures, and so on. Teachers also have access to course statistics which at the push of the button will, for example, count the number of responses from each student. Teachers have the power to delete postings from the site should the need arise.

Having provided some idea of how the course content and readings are delivered and how online teaching enables students to interact with each other and the teacher, what follows is an example of students' engagement with the meaning of the word 'critical'. In designing this course, I was conscious that the word 'critical' has different meanings in different discourses and that for most teachers the word 'critical' relates to critical thinking - the ability to provide a reasoned position based on evidence and argument. Most teachers do not make any link between the word 'critical' and oppressive relations of domination and subordination, which is how 'critical' is tied to questions of power in Marxist and neo-Marxist discourses (Fairclough, 1989; Thompson, 1984; Eagleton, 1991). Nor are they familiar with Foucauldian theories of disciplinary power and subjectivity (Foucault, 1975). The course activities are therefore designed to help teachers, who are students on the course, to acquire these new meanings, which are embedded in socio-cultural theories of literacy.

I have designed a sequence of activities that takes students from what they know already to a different understanding, that takes them from the every day meanings of the word 'critical' to specialist meanings of the word, what Vygotsky describes as the move from a spontaneous to a scientific concept (Vygotsky, 1962:117). The activities occur in the following order:

1. I ask students to list all meanings of the word 'critical' they can think of. To help them, I suggest that they think of words that collocate with the word 'critical' such as 'critical condition', 'critical thinking' etc.
2. I refer students to the British national corpus web site: http://sara.natcorp.ox.ac.uk/lookup.html. The web site explains how the database taken from British sources, was created. On this site when you enter a word, the programme generates 50 random uses of the word you have entered. If you look up the same word again, you will get a different random sample of 50. Students have to enter the word 'critical' and classify data according to the different uses of 'critical' that they find in the data.
3. Next students have to look at educational documents in their own context: (textbooks, policy documents, national curricula) and find five examples of the word 'critical' used in context.
4. Finally students are asked to examine work by Comber (1992) and Janks (1993a and 1993b) to work out what 'critical' means in relation to 'critical literacy' and 'critical language awareness', located in the specialist field that is the subject of the course.

With each activity, the meaning of 'critical' shifts or one of its different meanings is privileged. After each activity students are asked to post their findings on the discussion site and to compare their findings with their own previous findings and with the findings of other students.

Instructions such as:

> Post to the online discussion some of the examples you found, with a comment on any patterns you see in the way the word is used in educational contexts. (University of South Australia, 2002).
>
> Post your list of meanings to the online discussion with a comment on what you learned from this activity. (University of South Australia, 2002).
>
> Respond in the online discussion to at least one other student's list of meanings commenting on any differences, similarities or surprises you find. (University of South Australia, 2002).

invite students to enter into discussion online and to compare and contrast their answers. Finally at the end of the whole of Topic One students are asked to comment on how their understanding of the word 'critical' has developed during this part of the course. This is demonstrated by extracts from the online discussion.

Quality Criterion	**4.12**	The teaching and learning strategies of the course acknowledge learners' existing knowledge and experience, and provide opportunities for guided integration of new knowledge.

The following two extracts are typical of students' responses to Activity Two, at the beginning of the sequence.

1. Some of the meanings of the word 'critical' that I found after working through activity #2 include:
   - inclined to judge severely and find fault
   - characterized by careful, exact evaluation and judgement
   - being in or verging on a state of crisis or emerging
   - fraught with danger
   - indispensable, essential, of utmost importance, urgent
   - in dire need.

   Throughout this activity I have learned that one word can have many definitions. It is the way in which we use it verbally or in written text that gives it meaning. It is important for us to choose our words carefully so that others can interpret the context of a sentence correctly. A reader needs to understand what we are trying to say and for that to happen each reader needs to be able to choose the appropriate definition of our words based on the contexts we use them in.

2. To discriminate between good and not so good; To view discriminately; To analyze; To judge with disdain or disfavour; An adjective of something serious ie critical illness critical condition; To evaluate with thought; To be serious, to look at all angles; To highlight the errors of something or someone; Look beyond the surface; To digest, think, contemplate, reflect on something before providing an answer or opinion; To observe with intelligence and thought; To be negative; Of importance, more important than something else.To view all sides of something before making a decision; To weigh the positive and negatives

of something: (You're so critical of me - Negative; You did a fine job of critiquing that assignment. - Positive; Teaching children (and adults) to critically analyze text is a life skill that will be required throughout their lives - Positive). This little activity highlights how one word can mean so many different things. Yes, we want to be critical in our thinking and observing and be opened to critical assessment and critical dialogue but no one wants another to be overly critical of what they do and yet positive criticism helps a person to grow in whatever area of life. Criticism of a child's work can be done in a very positive, nurturing way or can be just plain and simple negative criticism.

The examples students found in education texts, Activity Three, were all similar.

1. After looking very carefully at my textbooks and documents I came up with a few examples where the word 'critical' is used directly in the outcomes. The following are two Language Arts outcomes:
   - Students will be expected to respond critically to a range of texts, applying their understanding of language, form and genre.
   - Students will be able to communicate information and ideas effectively and clearly, and to respond personally and critically.

   In both of these examples I take the word 'critical' to mean by careful evaluation and judgement. In my observation the way the word 'critical' is used in educational contexts directs the focus on students analyzing information carefully and thoroughly and developing a response based on this analysis. Let me know what you think.

2. 'Its goal is to create critical media consumers who can, and will, bring critical analysis to their use of the media'. 'Major studies are being carried out in the areas of critical thinking, literacy, cognitive studies, and career counselling.'In examples from educational documents, I have found the use of the word 'critical' has a positive connotation and has one of two general meanings; either clear/concise/judged objectively or essential/crucial.

By the time students have worked with texts in the field of critical literacy, they understand that 'critical' has a specialist meaning that is not reflected at all in the British corpus and that is rare in educational materials. Here are the responses of two students to Activity Four

1. Meaning of 'critical' in 'Critical Language Awareness' & 'critical literacy'. Critical in these two instances means:
   - to carefully and thoroughly analyze texts, both spoken and written, from a perspective that can challenge and question the choices that the author/speaker has made about what/who to include/represent or omit/silence.
   - to exert one's right to challenge the relationship between power and language and how this relationship privileges certain users of language over others.
   - to approach language in a way that questions the unnatural and unfair positioning of one group over another.
   - to exert power so that topdogs are challenged and the underdogs are empowered.
   - to question the status quo, how language meanings are maintained, to raise consciousness, to explore and challenge language use in different social contexts, to not always accept texts as truths, and to bring about change.

The onus is on us as teachers to provide opportunities for our students whereby they can question the author's intended meaning and to accept or reject these meanings when making comparisons to their own experiences, beliefs, morals, and values. Teachers have to provide opportunities that stimulate and encourage students to question more so the 'why' of texts than to explain the 'what' of texts. By providing a classroom environment that is inviting, encouraging, and welcoming of different ideas and views, students, when shown how, will be better able to question the intentions of authors and to challenge injustices of the status quo.

2. Critical Language Awareness explains how dominant belief systems are maintained. In the traditional classroom, children were/are expected to sit quietly, answer questions posed by the teacher, and accept meanings of texts as they are 'supposed' to be. The teacher is in power and this is not to be shaken by children thinking and questioning the teacher's or author's viewpoint.

   The word 'critical' in critical language awareness means challenging the status quo. Being able to challenge and possibly effect change comes from an understanding of the relationship between language and power. It also comes from an accepting and encouraging atmosphere in the classroom, where there is a balance of power and a respect of differing opinions. As a critical reader, the child understands that a producer of text makes choices that empower some and disempower others. The critical reader reads with awareness and weighs what they know and value against what is being said. They question what they read and decide if they can incorporate that view into their belief-system; they do not blindly accept text as fact or as being 'right' just because it is published. They have a clear awareness that the person that created the text had a purpose for writing it and made choices in what would be included, emphasized, or excluded. As a critical learner, they have a clear vantage point for scrutinizing text and being able to discern who and what is maintaining power through the production of the text. They realize that writers have a right to make decisions, but critical readers can question these decisions and consider other ways the text could have been written. Critical readers are aware of the power of language, but realize that they too have power - they can approach text with awareness and choose to accept.

Only once students have understood the meaning of 'critical' in the field of critical literacy, does it make sense to ask them to design critical literacy activities. Students need to understand that critical thinking is an important part of reading texts but that critical analysis, as used in the field of 'critical literacy', 'critical language awareness' and 'critical discourse analysis', requires that readers also ask whose interests are served by the texts, who benefits and who is disadvantaged? Do the texts work to maintain or challenge unequal relations of power? How does the way the texts are constructed work to position readers? The focus shifts from what texts mean to how they mean and *what work they do*. Students are asked to think about effects rather than intentions.

In addition, in the process of working on these four activities, the students, all teachers with a great deal of classroom experience, raise other issues that are of interest to them and that arise in relation to the online discussion.

Quality Criterion	**5.6.7** The site encourages interactions with other learners as well as with the tutor / mentor.

In 2004, the following ideas were discussed:

- Cross-cultural confusion in relation to what words mean, particularly in English Second Language (ESL) and English First Language (EFL) classes;
- Similarities and differences between teaching English and French in the Canadian context;
- Critical awareness of environmental issues;
- Supporting one another with technical issues relating to accessing parts of the site;
- Critical literacy and ESL;
- Possibilities and challenges in teaching critical literacy in the early years of schooling;
- Ways of criticizing their own students' work that are positive and nurturing;
- Canadian geography and weather;
- Equity in relation to gender and indigenous populations;
- Critical literacy across the curriculum;
- Marginalization of Newfoundland in Canada and negative attitudes to Newfoundland English;
- Production of a Newfoundland English variety dictionary and pleasurable exchanges about the meaning of dialect-specific words;
- Denotation and connotation.

Quality Criterion	7.1	Learners are encouraged to create and participate in 'communities of learning' in which the individual learner thinks and solves problems with others engaged in similar tasks. This is facilitated through a range of learner support mechanisms - peer support sessions, tutorials / contact sessions, teaching on assignments, support in the workplace (mentoring), email and Internet communications, for example.

Online discussion provides a space for students to make sense of new ideas in their own time and in relation to their own classrooms. Although written, the style of their online postings is often conversational and students tend to be both supportive and questioning of one another.

Students also use online discussion to voice their doubts and disagreements with the whole critical literacy enterprise and they work together to tackle these issues. The questions they raise are important and defy easy answers; they provide salutary cautions and help to nuance their pedagogies in relation to conditions of possibility in the contexts in which they actually work. Here are some of the students' concerns:

- How can children think about things that they aren't aware of yet, due to their age? Are we taking away their innocence?
- I am wondering if we teach this to our students in class will we lose some of our control? I don't mean control over learning, but control over the class with rules and regulations? If we encourage them to always question and criticize, they will do this with rules we live by! Parents will lose control too. 'Why do I have to go to bed at 8:00!' I can see some negative impacts here.
- I am also still concerned with taking the pleasure out of reading by picking it apart with too many questions!!

- So, now comes the issue facing us. Society has a set of values and norms that we are expected to adhere to. School systems and individual schools have certain expectations of their teachers. And as a part of that staff, you are expected to 'follow' whether you agree or disagree. I have taught in schools where teachers have been taken aside (in private) and verbally reprimanded. Why? Well, because they asked some 'critical' questions regarding assessments that were being done only within our own school. These teachers were told that they were having a 'negative' impact on the other staff members. So, I asked how do we teach critical language awareness to our students if we are discouraged from being critical question askers? I realize that to destroy the pleasure one experiences in any story is not what critical language awareness is all about. I think that children need to experience the magic and excitement in fairy tales like 'Snow White' and cartoons like 'Bugs Bunny'. Yet, at the same time they need to be critical readers. Maybe, with very young children, more emphasis should be placed on the enjoyment of such texts, rather than on the critical reading of it. Just a thought.
- Over half of my 21 kids are from ESL backgrounds and just getting some to write proper sentences is hard going at times. I realize it is not an over night nor a one year stint in my class that will get their English up to snuff but perhaps if we get the message along with teaching 'proper' sentence structures [and] the importance the two have in relation to their lives at even an early age we will be getting somewhere.

One of the miracles of online teaching is that every word is saved. It is possible to trace students' learning, to discover which activities are generative and which are not and to analyze how the teacher interacts with students and the effects of these interventions. It is clear from this overview of the online 'classroom' data that by the end of the first topic students have been actively involved in the activities and that their understanding has developed; they have been able to spin off these tightly scaffolded tasks into other issues that interest them in relation to their teaching contexts; and they have been able to offer critical readings of the course itself. If South African institutions of higher education are not to be left behind in the age of digital communication and a global higher education market, they need to take seriously the opportunities provided by virtual classrooms to extend their reach. It is clear that online pedagogies have the power to engage students cognitively, socially, and professionally and to connect them with academics and fellow professionals from whom they would otherwise be separated by time and space.

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Endnote

[1] The acronym UniSA for the University of South Australia should not be confused with the acronym UNISA for the University of South Africa.

Case Four: Learner support from a 'pilgrim companion' and student journals as a form of summative assessment in a UNISA religious studies module

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Editor's introduction

This case study is an example of innovative **course design** in terms of both **learner support and assessment practice**s.

In the first part, the author describes a very unusual kind of **learner support** which is provided by people outside the university who participate in 'learning pilgrimages' with UNISA students. The case demonstrates that it is possible to bring together students and non-students for their mutual benefit. In particular, it illustrates the following element of the criterion for learner support:

7.1 Learners are encouraged to create and participate in 'communities of learning' in which the individual learner thinks and solves problems with others engaged in similar tasks.

The second part describes the use of journals throughout the module and as a summative assessment tool. It illustrates the following element of the **assessment** criterion:

6.1 Assessment is recognized as a key motivator of learning and an integral part of the teaching and learning process. It is used to inform teaching practice and improve the curriculum.

In 2004, *Dynamics of Interreligious Encounter* won the NADEOSA Courseware Awards for independently developed material.

Learning in partnership with a pilgrim companion

Quality Criterion	4.9	Content, teaching and learning strategies and assessment are carefully structured to facilitate the achievement of learning outcomes.

In the University of South Africa module *Dynamics of Interreligious Encounter*, learner support is situated in the real life context of the student. The student is encouraged to embark on a 'pilgrimage' in the company of a person of another faith who acts as a 'pilgrim companion'. Throughout the learning pilgrimage the student is involved in on-going dialogue with his or her pilgrim companion, with the novel *The Poisonwood Bible* and with texts in the Course Reader. In addition to completing activities in the study guide, the student is also required to make regular entries in a personal journal.

Quality Criterion	4.13	Where appropriate, experiential learning opportunities are designed into the course. There are suitable methods for recording and assessing this (such as portfolios, logbooks, project reports, learner interviews, or reports from the mentor).

The pilgrimage metaphor challenges the student to approach the module as a journey, a pilgrimage to a sacred space 'inhabited' by his/her pilgrim companion. The student needs to be willing to give hospitality to another person, to new ideas and to new challenges. In this learning experience the relationship that is established with the pilgrim companion is of vital importance. As one student, LM, observed: 'The exchanges with my pilgrim companion helped me to translate in real life what I was learning through reading. At the beginning I was very critical of people of other faiths, but JM taught me never to assume I know something about what others think; so I did learn about her faith, but I also learned to be more open.' This learning happened because the student was willing to let her pilgrim companion into her life. Palmer regards hospitality as a central value in education that seeks the truth. From a Christian perspective he wrote:

> It is a virtue central to the biblical tradition itself, where God is always using the stranger to introduce us to the strangeness of truth. To be inhospitable to strangers or strange ideas, however unsettling they may be, is to be hostile to the possibility of truth; hospitality is not only an ethical virtue but an epistemological one as well (Palmer, 1983:74).

The activities in the module make use of articles in the Reader which provide foundational theological knowledge relevant to interreligious encounters. The second assignment seeks to help transform the perspective of the student about people of other faiths by deepening relational ways of learning (Taylor,2000:306). In collaboration with the pilgrim companion the student is asked to participate in a community service project that is sponsored by the pilgrim companion's religious community. This kind of relational learning enables the student to move beyond the cognitive level of rational discourse to create meaning from experiences. The students' assignments and entries in their journals indicate that this happens as they critically reflect on their experiences with their pilgrim companion. BK noted in her journal that she was changing her mind about how she viewed Muslims because of her interaction with her pilgrim companion and other women. She wrote: 'Over the past several weeks I have worked with TN at the soup kitchen to prepare vegetables for soup for the homeless people. All the women are diligent about their roles in the whole

Quality Criterion	4.12	The teaching and learning strategies of the course acknowledge learners' existing knowledge and experience, and provide opportunities for guided integration of new knowledge.

endeavour. I have learned how important charity as a part of their religious faith is for Muslims. What a different picture I am getting from the one I see on the news. I'm learning to be more open and not prejudge people. I was able to see what was meant by a theology of attention. Now I always try to be attentive whenever I am with my pilgrim companion.'

As the student works through the study guide and its activities and writes in the journal he or she also continues to work with articles from the Reader and to respond to *The Poisonwood Bible*. In this process the student's level of engagement with the module is expected to deepen. He or she must set up meetings with his/her pilgrim companion, integrate foundational knowledge with actual experience and spend time in reflection so as to construct meaning for his/her life. The module concludes with a list of supplementary readings. One student, RM, noted: 'I never consulted the suggested supplementary reading and then one afternoon LW, my pilgrim companion and I started talking about our identity. I then went to the library and took out the book by Barnes and he seemed to be listening in on our conversation. I learned a lot about the importance of knowing who I am as a Christian and respecting the identity of my companion as a Muslim.' Another student, LB, had this to say about supplementary reading: 'My pastor told me that I should not be visiting and talking with people who still practice African Traditional Religion. I explained to him that since I have gotten to know my pilgrim companion I have learned that even if she does not accept Jesus she is a good person and that I don't have to believe the same things as my companion, but we are still sisters and brothers.'

Quality Criterion	**4.11**	Teaching, learning and assessment activities encourage critical thinking and independent learning

Learner support is extended beyond the boundaries of the university as the module locates learning within a community context that is represented by the student's pilgrim companion. Learner support is experienced in the lived reality of the student's interaction with his/her pilgrim companion. In the context of participating in a project in the local community, learning is expanded and applied in ways that help students to develop foundational knowledge and to acquire skills for transferring that knowledge into various situations in society. As the facilitator of this module I have seen that learning in the context of a relationship with a person from the community studied can bridge the possible divide in distance learning between printed texts, the designers and producers of these texts and the 'real life' contexts described in the texts. Such a relationship enhances the relevance and immediacy of the learning process. In short, the distance in distance education can be bridged in this way.

Quality Criterion	**4.10**	Various forms of learner support are built into the design of the course.

Using journals for learning and for summative assessment

In the first year that the module *Dynamics of Interreligious Encounter* was offered, I asked a colleague in the field of missiology to be an external examiner for the journals which were to constitute the summative assessment. He wanted to know why I had chosen this form of assessment because it seemed to be what he called a 'soft option.' I explained that my research had led me to believe that this would not be the case. After assessing the journals according to the criteria outlined in the first tutorial letter for the module, it became clear to my colleague that we had entered into a new learning space and that a pattern was emerging in the learning process.

Huba and Freed (2000:239) give two reasons for using journals for the purpose of assessment: to evaluate learning and to promote learning. Moon (1999:19) maintains that 'journal writing accentuates favourable conditions for learning.' As a result of the experience I have gained from requiring learners to use a journal I have come to agree with the viewpoints of these authors. Through tutorial letters I guide the students in developing their journals and most have produced writing that has far exceeded my expectations.

The entries in the journals reveal a student's ability to enter into a missiological discourse in relation to interreligious encounters and also demonstrate a high level of metacognition. The students are learning about ways that they learn and what strategies are most helpful to them. JN observed: 'As I wrote down my thoughts about going to the temple with my pilgrim companion I suddenly realized that I was doing what I was reading about. I was participating in a common social action with people of another faith and I experienced a sense of common purpose and oneness with them. I was learning by doing something, not just reading about it.' New concepts were being applied by the student and he was checking their validity by putting them into practice. PK noted: 'I used key questions to prepare for my visit to the monk at the Buddhist temple who agreed to be my pilgrim companion. I read about Buddhism in the Reader and I was determined not to have the same approach as that of Pastor Price in the novel (*The Poisonwood Bible*) and all these things helped me to prepare for my visit with RG. Now back at home I realize that I need to know about the context of other people's beliefs. I was so impressed by the discipline of the monks. I have to think about the role of discipline in my own life.' What is clear is that a process of reflective thinking occurs through the use of the journal (Moon 1999:84). Students reinterpret the learning experience from different points of view, they link theory with praxis and the reflection goes on long after an event. The students move between free writing exercises and required writing through which their skills of critical thinking and reflection are developed. But all activities are part of the material for assessment.

Quality Criterion	**6.4**	There is a range of formative and summative assessment tasks and methods which ensure that all learning outcomes are validly assessed.

A fascinating three-phase learning process is revealed in the journals. First, there is often a measure of resistance to meeting with a person of another faith tradition. Sometimes this occurs because of a certain denominational stance, or insecurity about the learner's own faith or for the simple reason that it takes effort to find a person who is willing to share the learning experience at the level of faith.

The second phase begins once the student has established a relationship with his/her pilgrim companion and both have shared together and participated in some common action. When this happens the student becomes fascinated by elements of the other faith tradition as these are manifested by his/her pilgrim companion and his/her colleagues. More questions are recorded in the journals. The momentum of the learning process increases with more meetings and deeper discussions. There are conversations about reading material that are summarized. Engaging in authentic tasks serves to bring together theological discourse and lived experience. Students want to dig deeper as they learn about another faith.

Towards the end of the academic year when journals have to be submitted, students enter into a time of reassessment. They step back from their experience and what tends to emerge is a person more convinced of his/her faith and yet more open to people of other faiths. GB wrote: 'I feel liberated. I have grown stronger in my faith, but I am no longer afraid to meet with people of other faiths. In fact, I want to meet with them. I feel like there is so much more to learn and my SM and I will continue to discuss about our faith and read more. I'm sharing my Reader with him. I thought this would be an easy module, but it wasn't. I learned more than I had ever learned before.' TM recorded his experience: 'At the beginning I was wondering why I should keep a journal. But now I like it so much. I really feel I have been on a pilgrimage. I want to keep up being attentive. Thanks for the good articles. It was hard to keep a journal, but I got something for my life.'

Quality Criterion	**6.3**	The level of challenge of the assessment in a programme is appropriate for the level of the qualification to which it leads.

'I got something for my life.' Is this not what learning is about? Complex thinking skills and reflexive competence are very apparent in the students' comments throughout their journals. The whole process of journal writing helps them to integrate what they learn and when necessary to transfer this 'embodied knowledge' into other areas of their lives. By facing their fears, prejudices and stereotypes they experience a kind of liberation that can serve them well in multi-cultural and multi-religious contexts. The learning outcomes are achieved and some extra benefits are that students are able to deepen their learning and to move at a pace that allows for reflection. Analytical skills are honed through critical thinking about issues and events and the capacity for theological reflection is deepened as are writing and organizing skills. As a summative assessment tool the journal facilitates integrated learning. Free writing exercises enable the learner to become familiar with journal writing and key questions link feelings with cognitive learning processes. Analytical skills are developed through responses to issues raised in the readings and values are deepened through reflexive thinking. The journal as a form of summative assessment is far from a 'soft option'. It represents the best of integrated learning assessment.

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Case Five: Something new and different: the key roles of *imithamo* and *abakhwezeli* in the University of Fort Hare's B Prim Ed programme

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Editor's introduction

While most of the case studies in this book have been written by 'insiders' to the practices described and discussed, this case has been written by an 'outsider' who participated in one of several research projects which have investigated an initiative designed specifically to address local needs in one region in South Africa. The focus of the case is on **course materials** and **learner support**. In particular, the following are foregrounded:

5.5.6 Care is taken to understand the contexts in which learners live and work, as well as their prior knowledge and experience. This knowledge is used in the design of the materials.

5.5.7 Active learning and teaching approaches are used to engage learners intellectually and practically and to cater for individual needs.

7.1 Learners are encouraged to create and participate in 'communities of learning' in which the individual learner thinks and solves problems with others engaged in similar tasks.

In 2004, the materials described and discussed in this case study won the NADEOSA Courseware Award for collaboratively developed material.

Introduction

The first page of the first module in the University of Fort Hare's Bachelor of Primary Education (B Prim Ed) materials begins with the following paragraph:

> Once upon a time, in a new country, there was a new project. And the people in the project were starting something completely new and different and special, something that had never been tried before and they were very excited. But there was a problem. When they used the old names and the old words, like

'modules' and 'tutorials', to describe new things that they were trying to do, it didn't work. Everyone had their own ideas about what these old words meant. And they couldn't shake off these old ideas no matter how hard they tried. (University of Fort Hare, Umthamo 1, 1998:1)

A two page account, written in the genre of a traditional tale or fairy story, describes the process of deciding on new names and new practices for the project of designing and implementing an in-service teacher education programme for primary school teachers in the Eastern Cape.

The project had its origins in a feasibility study undertaken in 1995 by the University of Fort Hare (UFH), the Eastern Cape Education Department and the University of South Australia (UniSA) under the leadership of Basil Moore of UniSA. This study yielded expressions of interest in professional development through distance education programmes from over 5000 teachers.

Quality Criterion	**3.1**	The programme is developed in terms of a needs analysis based on an audit of existing courses and programmes, market research, liaison (where appropriate) with industry and professions, national and regional priorities, and the needs of learners.

In South Africa it was a time of transition in regard to teacher education qualifications and so work on the B Prim Ed curriculum began in earnest only in early 1998 with the first modules offered to teachers in the second half of that year. As has often been the case with distance education initiatives in South Africa, curriculum designers and materials writers did not have time to develop the entire curriculum prior to its delivery to the first cohort of students. Alan Kenyon, the initial academic co-ordinator (the programme is now managed by Liz Botha), described the programme development process in these words: *Invent things as you go. Solve things as they immediately hit you* (SAIDE, 2003: 27). While this description might suggest an 'ad hoc' approach to curriculum design and materials development, this was not the case. The programme had been carefully conceptualized and decisions made that its focus would be on the following:

- Providing award-bearing and accredited courses that are commensurate with South Africa's new curricular thrusts;
- Addressing the scarcity of trained teachers in maths, science and technology education, language teaching and its use across the curriculum, school management and early childhood development;
- Introducing and modelling the training of teachers in multi-grade teaching, a situation that faces many of our province's primary teachers but is mostly not addressed in their development;
- Enhancing the classroom performance of teachers through researching and propagating comparative best practices - generic and learning area specific, determined both locally and internationally;
- Impacting whole school development through teacher learning activities and programmes. (Distance Education Project: Input to Fort Hare Institutional Plan, quoted in SAIDE, 2003: 14)

In terms of the South African National Qualifications Framework (NQF), a B Prim Ed is a four year 480 credits programme. However, as the Fort Hare programme was designed as an in-service initiative, 240 credits are derived from teachers' pre-service qualifications and classroom experience. The programme comprises eight semesters of part time study (i.e. teachers make a four year commitment, accumulating 60 credits per year).

The decision to use *imithamo*

One of the innovative decisions that was made at the outset of the materials development process was that instead of using one lengthy course book or study guide for each module each semester, students would work with a total of eight booklets in each semester. The name *umthamo* (plural *imithamo*) was decided on for each of these 'bite-sized chunks' - 36 to 48 page texts designed to be used for 40 notional learning hours. One of the findings of research on the programme is that there have been several advantages to this decision. Firstly, students have reported that the imithamo are 'user-friendly' - less intimidating than one large book and easier to transport to work and to contact sessions. Secondly, the booklet format has facilitated the introduction of one topic in each of the four key learning areas (Literacy; Numeracy and Mathematics; Natural Sciences; Technology) and one in each area of Core Educational Studies (Learning about Learning; Helping Learners Learn; Schools as Learning Communities; Learning in the World) each semester. The booklets have enabled the offering of an integrated curriculum in which aspects of Literacy or Numeracy or Science or Technology or Learning Theories can be worked on during one semester rather than sequentially in different semesters, as would be the case if a whole course in one of these areas were to be 'delivered' in one text. Writers of one *umthamo* frequently refer readers to content and activities in other *imithamo*.

Quality Criterion

5.5.8 Content is presented in the form of an unfolding argument, rather than discrete bits of information that have no obvious connection.

Thirdly, use of small booklets has made it possible for designers and writers to respond more easily to feedback on early booklets and to introduce some changes to later ones. For example, writers found that additional explanatory or signposting icons needed to be added to the booklets.

Quality Criterion

5.5.9 The various elements of the course materials and different media are integrated, and the integration is clearly signposted.

On the advice of colleagues from UniSA it was decided that in the final year, only eight of the originally envisaged 16 booklets would be produced and that students would be required to re-visit and reflect on earlier imithamo as part of the process of consolidating their learning from the overall programme.

Quality Criterion

5.7 The materials development plan includes provision for evaluation during the developmental process in the form of critical commenting, developmental testing or piloting.

While the logistics of distributing so many separate booklets could be a problem for some distance learning programmes, in general it has not been problematic in the UFH programme because students are required to attend fortnightly Saturday morning contact sessions at which the next booklets in the sequence are given to them. Initially there were occasional difficulties when booklets did not reach a particular contact session venue in time, but it has been possible to address these in various ways.

Designing and producing the *imithamo*

The curriculum development team consulted widely - particularly with academics from UniSA, the Open University (United Kingdom) and the South African Institute for Distance Education (SAIDE). The initial academic co-ordinator, Alan Kenyon summed up advice from the Open University UK which guided the materials development process:

> Write to the target audience. Don't worry about the academics. If you look after your target audience and lead them along, you're going to astound the academics anyway. More of the same isn't going to fix it. (SAIDE, undated: 27)

With this advice in mind, the team decided to do the following:

- Affirm teachers as experienced in the classroom, in community and family life;
- Foreground the local;
- Offer an integrated curriculum with explicit links between one umthamo and another;
- Guide and support a process of change in classroom practices;
- Assist teachers to theorize old and new practices and to become reflective practitioners.

Throughout the programme students are referred to as teacher-learners, a name which is intended to give recognition to their professional experience while indicating that there is learning to be done as they engage with the imithamo. The emphasis in this learning is on pedagogic content knowledge (Shulman, 1986;1987) rather than on subject or learning area content knowledge. In the materials a distinction is made between in-text activities and key activities which must be submitted for assessment.

Quality Criterion	6.1	Assessment is recognized as a key motivator of learning and an integral part of the teaching and learning process.

Both kinds of activities occur at regular intervals in the materials (usually every four to five pages) and are carefully scaffolded. While answers to the in-text activities are not provided, many are followed by related discussion which provides feedback to the student. The majority of both the in-text and key activities are classroom focussed. Some of the in-text activities require teachers to write in **learning journals** which they are to keep for the four years of the programme. Others require the production of evidence of work done by teachers and their learners in the classroom. The latter is to be submitted as part of a **portfolio of evidence** of professional growth which is submitted for assessment at the end of each year.

Quality Criterion	6.4	There is a range of formative and summative assessment tasks and methods which ensure that all learning outcomes are validly assessed.

While all teacher-learners study the same modules, there are often different activities for teachers working in different phases. According to Viv Kenyon, the leader of the Language, Literacy and Communication curriculum team, the activities have been designed along a continuum from relatively straightforward in the first year to much more challenging in the final year. In an interview in 2000 she described the activities as being at four 'levels':

> Year One is about describing what is being done and providing evidence of this. Year Two is about 'unpacking' the above and asking questions such as: Why is it like that? Why did it / did it not work? How could I do it differently? Year Three will require teacher-learners to become more 'critical' and start to bring in more theory. By the end of Year Four, the teacher-learners should be fully able to question, justify and improve their practice using theory as a tool. (SAIDE, 2003: 28)

Another of the innovations in the UFH B Prim Ed materials is the focus on the 'local'. There are frequent references to Eastern Cape place names and to people likely to be known to the teachers. Some of the *imithamo* include articles from Eastern Cape newspapers. Much of the content, especially in regard to explanations of how to plan and execute particular classroom activities, has been trialled in local schools and so there are references to school names and to teachers who participated in the trials. The materials include numerous instances of code-switching from English to isiXhosa - the language assumed to be the home language of the students. This code-switching both affirms the local and provides opportunities for writers to explain complex concepts. The writers also provide glossaries of terms and concepts with which readers may be unfamiliar and write in an accessible, if sometimes very directive, style throughout.

Quality Criterion	**5.5.5**	The language level of the materials is appropriate for the target learners and the materials assist learners with the particular difficulties that learning-through-reading and learning at a distance require.

One of the ways in which the UFH materials differ from many other examples of Southern African distance learning materials is in extensive use of photographs - in colour on front and back covers of the imithamo, in black and white at intervals in each text. Many of these photographs show learners at work in Eastern Cape classrooms. Van der Mescht (2004) makes the following observations on the photographs of learners and their classroom 'world':

> These learners have been photographed showing the kind of distance that teachers usually keep from their pupils as they move around the classroom. This suggests a social distance and level of emotional involvement that teachers are familiar with. Closer would be an invasion of privacy for the learner. These medium shots allow the reader to see the co-operative learning of learners in groups. Teachers would want evidence that all or most of the learners are focusing on their work, and the photographs provide that evidence (2004:93).
>
> This world appears more real as it is a bit battered and poor, with raw brick interiors and old desks and chairs. Some subjects do not have school uniforms. The home-photography, snap-shot quality parallels this sense of unpolished reality: subjects are not posed and black and white reproduction gives surfaces a grainy, rough texture. The combined effect of subject and production is to suggest that lessons promoted in this course will work in the unvarnished poorer schools of the Eastern Cape (2004:95).

Some photographs focus on teachers at work on an activity and demonstrate to teacher-learners how to implement a new practice. In some places line drawings are also used for giving such guidance.

Quality Criterion	**4.13**	Where appropriate, experiential learning opportunities are designed into the course.

In research which investigated the responses of 64 teacher-learners to the UFH materials, they expressed their approval of the photographs both because they valued the guidance offered for activities and because they could identify with the classroom contexts in the photographs (SAIDE, 2003: 47-48). Many of them expressed their appreciation of writers who understand the contexts in which Eastern Cape teachers and learners live and work. Of course this very strength for these teacher-learners could be a weakness if the same materials were to be used in other parts of South Africa as they could be viewed as alienating by students who are not Xhosa-speaking and not from the Eastern Cape.

The role of the *abakhwezeli*

The Xhosa word umkhwezeli means 'someone whose job is to keep the fire burning just right so that the food in the pot cooks well'. This is the word chosen by the UFH curriculum development team to describe the role of tutors who facilitate the fortnightly Saturday morning contact sessions and who mark key activities submitted for assessment. At the Saturday sessions teacher-learners report and reflect on activities which they have tried out in their classrooms and receive guidance from an umkhwezeli for their continued engagement with the current *imithamo* or initial work with new *imithamo*. The majority of the *abakhwezeli* are teachers or principals from schools in the local area or lecturers from former colleges of education in the region. They attend quarterly centralized training sessions and are paid a stipend for their work. In response to questions from a SAIDE researcher about their reasons for taking on this demanding task, the opportunity for professional development was more frequently expressed as the main reason than was the money earned.

Quality Criterion	**7.6**	Tutors are selected and trained for their role of mediating learning from course materials.

Some of the abakhwezeli, together with additional staff from the Eastern Cape Education Department, also visit teacher-learners in their schools to provide support to their classroom and whole school change initiatives.

Data from interviews with 40 teacher-learners indicate that they felt their learning was supported by the ways in which content and activities are presented in the *imithamo*. However, 38 of the 40 believed that they would not be successful in the programme without support of the contact sessions (SAIDE, 2003: 54). Osei-Agyakwa and Botha report a similar finding from their questionnaire-based survey of teacher-learners in the same programme, with 'face-to-face sessions which give teacher-learners an opportunity to share and discuss' placed first in their list of five factors that support learning (2001:13). As almost all the *abakhwezeli* are Xhosa-speaking they can assist teacher-learners who may be struggling with the academic literacy demands of materials written in English (though as indicated above, writers include glossaries of terms which they consider may be new to teacher-learners and write in an accessible style). Important as these contact sessions are, they may have one unintended negative consequence: teacher-learners can often get the 'gist' of what is required to complete the assessed activities without careful and critical reading of an *umthamo*. If they do not do such reading, then they miss out on much of the richness of the materials. Close reading could be encouraged by making it central to some of the assessed assignments and by explicitly guiding teacher-learners in how to further develop their academic literacy.

Conclusion

The enrolment of approximately 1400 teacher-learners in the programme at one time suggests that it is popular with Eastern Cape teachers and that it is meeting a need. The UFH B Prim Ed has succeeded in (i) opening access to professional development for teachers with limited qualifications and (ii) providing opportunities for learning of high quality through carefully developed materials and through learner support in the form of both contact sessions and school visits.

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Case Six: Assessment in the Diploma in Animal Health Practice at the former Technikon Southern Africa

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Editor's introduction

It is important that programmes aimed at building professional competence in the workplace are delivered not only at institutional sites but also in work-based and/or service learning contexts: it is practical application of the theory in authentic contexts that is required, rather than merely theoretical knowledge of how to practise. However, delivery at multiple sites is difficult to manage - what is learnt at one site may contradict or repeat what is learnt at another, resulting in learner confusion or boredom.

Similarly, it is important for programmes such as the Diploma for Animal Health Practitioners to have multiple entry and exit points and arrangements for recognition of prior learning in order to meet the needs of adult learners who have a range of life and work experiences as well as time and study constraints. However, there is a danger that if too much flexibility is built into a programme, it may lose coherence and learners will not achieve the competence required in terms of the purpose of the programme as a whole.

Integrated assessment is a useful strategy for promoting coherence while retaining the advantages of flexibility and multiple sites of learning. This case study illustrates how assessment needs to be designed into the programme at the outset, and how carefully designed assessment can both develop and measure applied competence in terms of the purpose of the programme as a whole.

The case study therefore addresses two main criteria - **programme development**, and **assessment**:

3. Programmes are flexible and designed with national needs as well as the needs of prospective learners and employers in mind; their form and structure encourage access and are responsive to changing environments; learning and assessment methods are appropriate to the purpose and outcomes of the programmes.

6. Assessment is an essential feature of the teaching and learning process, is properly managed, and meets the requirements of accreditation bodies and employers.

The case study shows how responsiveness and access can be managed through a careful assessment strategy.

Introduction

This case study describes the assessment strategy and, in particular, the integrated assessment in a three-year first degree/diploma programme for Animal Health practitioners offered in a distance learning environment at Technikon Southern Africa (TSA) - since 2004, merged with the University of South Africa.[1]

> Quality Criterion **3.19** Wherever possible, programmes allow for flexible exit points.

The diploma is a professional qualification designed as a tiered career-focused qualification leading to a four year Bachelor of Technology (B Tech: Animal Health). It provides easy access and exit points for adult and lifelong learning, creating pathways enabling learners to return to learning at various stages in their lives.

The Animal Health programme aims to qualify the learner as an Animal Health practitioner, competent in applying animal health care, disease control and management techniques in the prevention and control of animal diseases to support animal and human well-being. Graduates of the programme can assume professional responsibilities as animal health practitioners, meat inspectors, feedlot managers, pharmaceutical representatives and stock farm managers.

Such work requires knowledge from a range of disciplines - from veterinary science to rural development and management. Animal Health graduates are required to use this varied knowledge and skills base to contribute to the improvement of South African agriculture and rural development.

In order to equip them for this, the programme has two components:

> Quality Criterion **3.12** In the case of professional and vocational programmes, work-based learning forms an integral part of the curriculum, and, where appropriate, placement in a work-based environment is an essential component of the programme.

- An institution-based distance education component, with theory as well as practicals;
- A context-based component, with opportunities not only for workplace practice, but also for community service in which learners confront social issues and apply their knowledge and skills in needy communities.

The programme not only has a purpose and overall outcomes, but also what is called at Technikon Southern Africa 'statements of graduatedness'. These statements define the requirements at key exit points of the programme (or points at which a learner can graduate). They describe the expected levels of expertise (intellectual knowledge and skills), general and specialized professional roles, professional workplace and community service of graduates of the Animal Health programme. The underpinning philosophy of the 'statements of graduatedness' is that graduates of the College of Agriculture and Environmental Sciences should become knowledge workers and productive citizens. They should not only have the necessary expertise (intellectual knowledge) and professional knowledge (being able to apply what is learnt), but they should also be able to apply their knowledge in a professional situation, taking into account the needs of others (professional ethics). The assessment strategy therefore needs to assess whether or not graduates are knowledgeable, practical, productive and critical citizens striving to improve the quality of life for all.

Quality Criterion	**6.5**	Assessment, especially of experiential or workplace learning, is designed in terms of predetermined outcomes and criteria.

Integrated assessment in the programme as a whole

In most educational programmes in schools and tertiary institutions, different subjects or courses or modules that make up a programme are assessed separately. A pass or fail in the programme as a whole is worked out in varying ways from the collection of assessment results of different modules/courses/subjects. However, there is little attempt to assess more than one module/course/subject together, or to develop an assessment that requires the integration of the knowledge and skills from the other modules. For some programmes (such as a first Bachelor's Degree) this may be appropriate. But for other programmes designed to equip students for a particular vocation or profession, it may be important not only to assess discrete knowledge and skills, but also whether or not students will be able to use the knowledge and skills appropriately in the workplace. This calls for one or more opportunities for integrated and applied assessment. Students should not only have the knowledge, but be able to apply it reflectively in practical situations. In other words, they need to develop 'applied competence', which is understood as:

> the ability to put into practice in the relevant context the learning outcomes acquired in obtaining a qualification. [2]

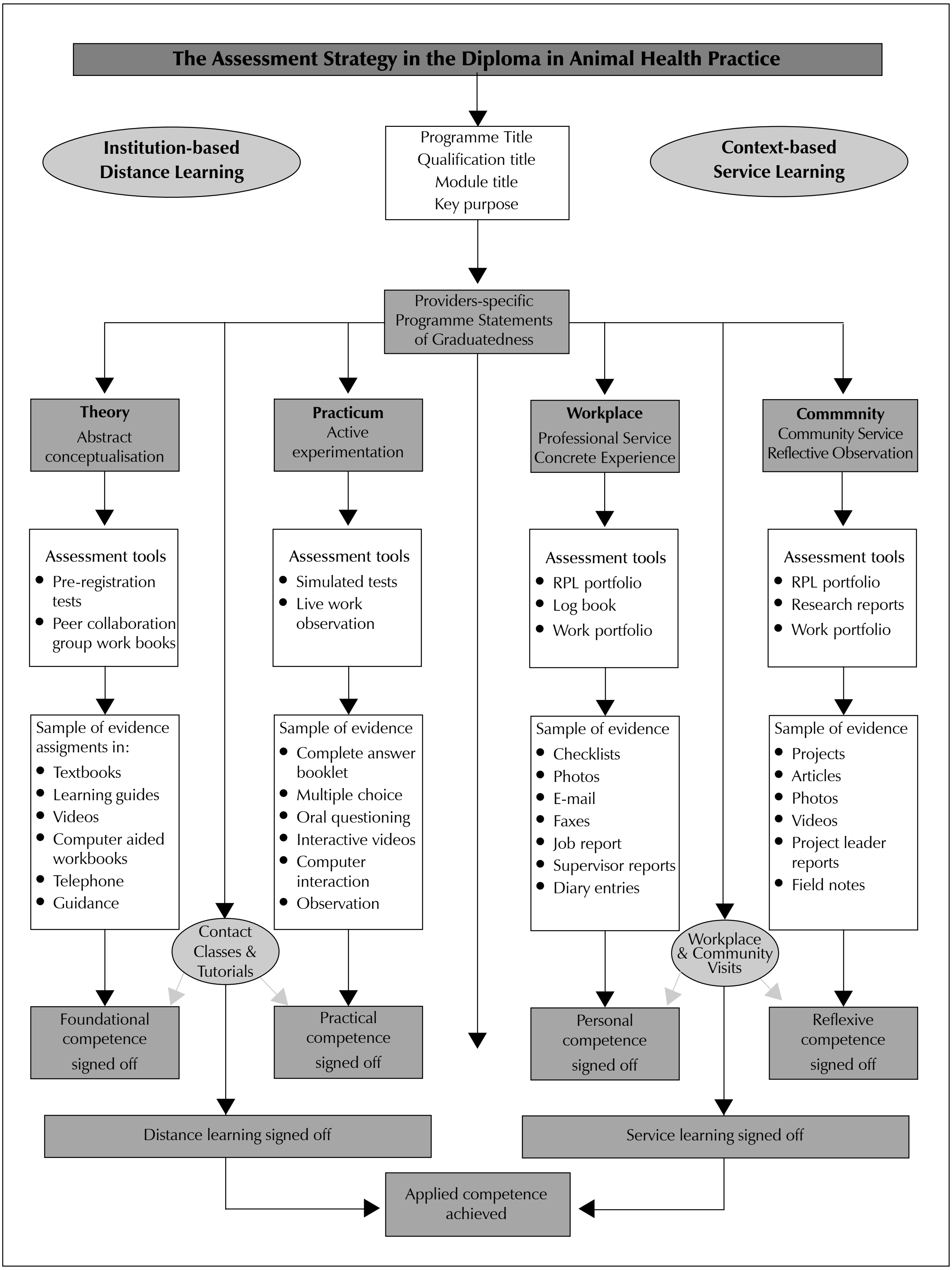
The assessment strategy in the Diploma Programme for Animal Health practitioners contains opportunities for assessment both of discrete knowledge and skills, and of the ability to apply knowledge and skills in an integrated way in the workplace. The ability to integrate and apply knowledge and skills is built cumulatively. The first tasks are relatively simple: self- or peer assessment of two or more outcomes of a single distance learning unit to stimulate comparisons or associations, to explore relationships, or to challenge learners to draw conclusions. However, even at this level, integration is encouraged. The next level of assessment is of the outcomes of an entire module in a written or practical examination. Finally, modules from various disciplines and professional fields are assessed through logbooks and research projects in context. At this level, the exit-level outcomes and critical cross-field outcomes of the qualifications are assessed to ensure that the learner achieves the key purpose/s of the programme.

Quality Criterion	**6.7**	For each programme, there is at least one integrated assessment procedure which is a valid test of the key purposes of the programme.

It is clear from the diagram on the following page that assessment is an integral component of programme and course design, and not something added on afterwards.

Quality Criterion	**6.1**	Assessment is recognized as a key motivator of learning and an integral part of the teaching and learning process.

Figure 1: The Assessment Strategy in the Diploma in Animal Health Practice



The 'openness' of the Animal Health qualification is managed with integrated assessment at each entry and access point - before the programme starts, at the end of the first year, at the end of the second year and at the end of the third year. Access to the Animal Health qualification is informed by pre-registration assessment and Recognition of Prior Learning Assessment (RPL).

Quality Criterion	6.8	There are effective procedures for recognizing prior learning and for assessing current competence.

The results of assessments are used to place prospective learners appropriately in the course and to provide support services to learners with special needs and/or to identify and acknowledge prior learning.

Learners on the programme come from diverse backgrounds including mature learners returning to study, or ill-prepared full-time distance education learners, or learners who are the first in their family to be studying at a higher education institution. Such learners are often worried by the prospect of submitting their work for assessment. The assessment strategy of the Animal Health Programme includes multiple assessment tasks at an early stage of the programme with feedback designed to allay these fears and get learners on the right track. Learners with special needs have access to personalized learner support, including peer -collaboration groups (see the case study on the Peer Collaborative Learning project) and tutorials.

Quality Criterion	7.22	Learner performance is monitored and learners at risk identified. Timeous educational intervention is provided for such learners.

Learners with potential are identified through assessment and offered accelerated and/or enriching modules to keep learning challenging.

Ensuring that applied competence is developed and assessed

In order to ensure that applied competence is developed and assessed, Kolb's Experiential Learning Cycle is applied to the theoretical and practical learning in each year.

This cycle begins with abstract conceptualization provided via distance learning activities and active experimentation offered in five practical contact courses in collaboration with industry and accredited laboratories. Learners are assessed by means of oral, written and practical tests. The following table represents the five practical courses offered in the programme.

Table 1: Practical courses offered in the Diploma in Animal Health Practice

Year 1	Year 2	Year 3
Anatomy & Physiology (5 days)	Laboratory Diagnostics (10 days)	Meat Hygiene (VPH) (2 days)
	Artificial Insemination (10 days)	Tuberculosis/Brucellosis (10 days)

The theory components and practicals (practicums) are followed by concrete experience in the workplace where learners get the opportunity to deliver professional services as animal health practitioners in training which continues with self- and group reflective observation. This leads to the derivation of general rules describing the experience in a logbook, or the application of known theories and the construction of ways to modify the theory or practice through research projects. These learning and assessment processes therefore provide the opportunity to develop foundational competence (understanding of what is being done and why), practical competence (ability to do a particular thing), and reflexive competence (reflect on the action in order to learn from it and adapt to change and unforeseen circumstances).

Foundational and practical competences are predominantly learnt through institution-based teaching interventions while personal and reflexive competences are most commonly achieved through context-based service learning. Theory is assessed through written assignments and a summative examination, while practice is assessed through practical examination complemented with written and oral tests. Workplace learning is assessed by means of logbooks based on quantitative and qualitative assessment of the performance of the learner by his/her workplace mentor(s) and his/her lecturer(s), while community service learning is assessed through a portfolio and integrated research projects adding self, peer and other stakeholder reflections to the assessment procedure.

Quality Criterion	6.4	There is a range of formative and summative assessment tasks and methods which ensure that all learning outcomes are validly assessed.

In the course of the cycle, assessment is used for a variety of purposes - diagnosis, feedback and/or grading. During the cycle, evidence of formal learning is collected as well as naturally occurring evidence of informal learning in the workplace or community. Assessment is conducted by multiple assessors (self, peers, tutors, coaches, line managers, clients, lecturers, markers, RPL assessors, workplace mentors, internal and external assessors/moderators and/or subject specialists).

Quality Criterion	6.6	A range of parties is involved in assessment of learners: for example, there might be self-assessment, peer assessment, tutor assessment and/or assessment by workplace mentors.

An example of the assessment strategy applied to the key service learning module in the programme, Animal Health Practice

Animal Health Practice is an experiential service learning module which uses the key purposes of the whole programme as its benchmarks for assessing performance. Animal health practitioners support veterinarians, biological workers and other animal scientists by performing more routine tasks, freeing them up for the more specialized complex tasks. *Animal Health Practice* is therefore multidisciplinary and draws together knowledge and skills from a range of different modules. It also allows an opportunity for theoretical and practical learning in institutional sites to be applied in a specific service learning context. Through successful completion of the assessment of this module, the learner will demonstrate professional competence as an Animal Health Pracititioner.

The learner who enrols for *Animal Health Practice* is supposed to work and learn for a minimum of six months (120 days) at an approved institution, organization or with a private professional in the field. The learner is responsible for selecting a suitable organization and mentor, and for agreeing with the mentor on the tasks to be performed. The tasks resemble the real life role which learners will assume when they apply for work.

The assessment strategy for the experiential learning component requires learners to compile a logbook of all workplace activities as well as structured service learning projects which are put together in a portfolio. Learners register once for this module and the registration is valid for five years. They are expected to complete six projects over a period of three years.

The role of the logbook in the development and assessment of competence

The learning and assessment opportunities support learners from the stage of working under supervision to taking responsibility for their own work and later for the work of others. In the logbook the learner records on a daily basis the date, place/premises, work done/ activity, remarks, number of animals/samples, signature of the mentor or the person present. The tasks listed in the logbook cover an extremely broad range of activities in large repetitive numbers to ensure the learner develops the necessary skills such as innoculation, fertility investigation, inspections, sample taking, disease testing, clinical procedures, etc. The experiential learning tasks are measured both quantitatively (number of repetitions) and qualitatively (performance level).

People involved in assessment

Formative assessment is undertaken largely by the workplace mentor, but also through occasional monitoring visits by the lecturer as well as personal communication between mentor and lecturer. The experiential learning manual also contains various assessment rubrics which can be used as performance descriptors and/or anchored checklists for feedback from the mentor and peers and most importantly for self-assessment. Thus experiential learning involves the ability of individuals to observe and record their own progress, an important part of becoming a lifelong learner.

Feedback on assessment and the development of reflexive competence

Learning requires frequent feedback if it is to be sustained. Animal Health staff train tutors and mentors to be constructive critics of learners and to provide positive feedback specific to the situation and the critical incident that took place as a tool for learning. Care is taken that the time between the moment of feedback and the occurrence of a critical incident is not too long. It is easier to reconstruct an incident and analyze the learner's professional behaviour if the incident is still vivid in the minds of the actors. The feedback given to the learner is written down in the logbook.

Learners are expected to write down what happened in the critical incident and also the feedback regarding the incident, and analyze the feedback given to them by various stakeholders. Learners are encouraged to write short personal reflective statements regarding what they have learned to test theory against practice and refine theory based on practice and also mention how they will improve their professional behaviour in future. In this way reflexive competence is developed.

Service learning projects for the development and assessment of critical professionalism

To ensure that the Animal Health graduate is a productive and critically engaged citizen and professional in the broader community, learners carry out service learning projects. In the community service research projects, learners can choose to pose their own problems and with the help of the environment, find their own solutions. Learning is grounded in particular contexts and individual experiences. For example, learners may decide to perform research on an animal health related problem they encounter in their work field, analyze their findings and use the results gained from this project to inform and advise farmers involved accordingly. Another project would be to identify the characteristics of a specific animal breed and analyze the suitability of this breed for specific production purposes and financial value for a farmer in a certain area using an animal health related approach.

The assessment guide for service learning projects contains guidelines for research as well as an assessment grid with assessment criteria. There is also space for learners' reflective statements based on feedback from others. For the final integrated assessment learners have to submit a portfolio containing all elements of the professional training assessed (that is, logbook and projects) as well as a CV, reports on in-service training and evidence of practical courses passed. It represents a collection of information gathered to show the learner's achievement of the professional competence over time.

Conclusion

One of the most important lessons from this case study is that learners should not only be assessed in institutional settings on how to apply a single theory to practice. If the purpose is to train practitioners rather than merely technicians, there needs to be assessment in service learning contexts where real problems which require a range of contextually relevant solutions, are located. Through integrated assessment in service learning contexts, learners can demonstrate their professional competence in terms of the key purposes of the programme.

Endnote

1 Since the programme referred to in this case study was developed at Technikon Southern Africa prior to 2004 when the merger with UNISA took place, it is referred to as a case study from TSA.

2 South African Qualifications Authority. (2000). *The NQF and Curriculum Development*. Pretoria: SAQA. p.18

Case Seven: Student support in the first two years of a teacher upgrading programme offered by UNISA

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Editor's introduction

As outlined in this case study, UNISA was faced with the challenge of designing and implementing a new teacher upgrading programme - the National Professional Diploma in Education (NPDE) - in a very short period of time. Given that the majority of students would be full-time teachers who had not participated in academic study for some time and who use English as an additional language, it was clear to UNISA staff that learner support would be a vital part of the programme. Providing such support would be difficult because of the very large numbers of teachers enrolled on the programme - with 2 318 teachers in the first cohort. The author's reflective account of achievements and difficulties in the first two years of implementation addresses quality criterion 7:

> Learners are provided with a range of opportunities for real two-way communication through the use of various forms of technology for tutoring at a distance, contact tutoring, assignment tutoring, mentoring where appropriate, counselling (both remote and face to-face) and the stimulation of peer support structures. The need of learners for physical facilities and study resources and participation in decision-making is also taken into account.

This case study demonstrates that it is possible to meet the criteria for quality distance education even in a programme with very large numbers.

Introduction

The National Professional Diploma in Education (NPDE) is targeted at educators who are already in the classroom but who are not fully qualified in terms of the requirements of the South African Council of Educators.[1] The average age of these educators is around fifty and many have not studied for many years and/or have dropped out of previous upgrading programmes. They may not be well-equipped or motivated for further study and thus are likely to require 'learner support'.

The term 'learner support' has been used very broadly and in relation to a range of diverse activities. The following list (derived from SAIDE, 2000; Mays, 2000; 2003) illustrates the broad range of activities which are offered to distance learners and which are listed under the rubric of learner/student support.

Related to learning and teaching processes/needs:

- Pre-course study skills training;
- Learning and teaching contracts;
- Network of learner support centres;
- Compulsory residential sessions;
- Practical sessions for professional training, e.g. nurses, educators; for artisan training, e.g. access to workshops, etc; for natural scientists, access to laboratories, etc;
- Academic advising, tutoring;
- Tutor marking and feedback and quick turnaround time on assignments;
- Orientation and ongoing training of tutors to ensure provision of quality support;
- Supply of high quality learning materials;
- Pre-examination counselling;
- Administration of examinations;
- Peer support/study groups;
- Technology enhanced learning, e.g.
  - radio broadcasts to promote live discussion of issues and problems
  - audio and/or video tapes
  - telematics
  - newspapers (internal and mass media).

Related to access and information processes/needs:

- Record management;
- Information on admission and registration;
- Information on administrative procedures and regulations;
- Bookshop services;
- Library services;
- Personal timetables;
- Information on fees and financial support;
- Access to information technologies;
- Career guidance.

Related to social and personal needs:

- Pre-course registration counselling;
- Counselling in person and by letter, telephone and e-mail;
- Internet and e-mail support;
- Peer support/study groups;
- Disabilities support;
- Minorities support;
- Adult learners support;
- English as a second or other language (ESOL) and languages teaching unit;
- Multicultural education coordination;
- Social events.

This case study discusses the learner support offered in the UNISA NPDE programme under the three broad categories outlined above. In each part of the discussion, a distinction is made between what was planned and what actually happened with a view to identifying some useful lessons from experience. The case study includes feedback from a student evaluation of the programme as a whole, with a particular emphasis on the effectiveness of the learner support.

Support related to learning and teaching processes/needs

Supporting the development of academic literacy

Many prospective NPDE students will not have been studying for some time and many are Foundation Phase teachers whose main classroom language is one of the indigenous languages rather than English - the language of instruction in the UNISA NPDE. In recognition of their likely need of academic literacy support, at the start of the NPDE programme all students are required to work through a module called *Language and Learning Skills*. On successful completion of the module, it is hoped that students will have extended their language and study skills in English in order to engage effectively with the rest of the programme. In a recent survey of NPDE students, however, only 33/707 students rated *Language and Learning Skills* as the most useful module on the course. This was the lowest rating among the five first-year modules. It may suggest that students have not seen the relevance of the module to their other studies but given the phrasing of the question, it may also be that the module was found useful but not as useful as some others. Responses to the module will need to be explored more fully.

Quality Criterion		
	7.2	Academic support is built into the design of the course materials

Provision of contact sessions as an integral part of programme delivery

One of the biggest differences between the UNISA NPDE programme and other UNISA mainstream offerings is the provision of contact sessions as an integral part of the programme delivery.

Quality Criterion	**7.5**	Care is taken to place suitable sites of learning close to where students live/work.

UNISA promised that it would offer contact sessions wherever there was an average of 30 students studying the same modules and these contact sessions would account for at least 10% of the notional learning hours of the programme i.e. at least 60 hours of direct face-to-face contact in a typical 60 credit academic year.

Quality Criterion	**7.9**	There are sufficient contact sessions to ensure that the learners are able to achieve the outcomes of the course.

Quality Criterion	**7.10**	Contact sessions are integrated into the course design, rather than being an add-on extra.

Quality Criterion	**7.6**	Tutors are selected and trained for their crucial role in encouraging active engagement of each learner in the course/programme.

Learning from the University of Fort Hare programme (SAIDE, 2001), the contact sessions were intended to orientate, maintain and conclude students' study of each module, with the tutors playing a facilitating/motivating role rather than teaching the content of the modules. In addition, the tutors were to mark and give feedback on the two assignments per module which, taken together, counted for 50% of the final mark for each module. It was intended that tutors would complete marking between contact sessions and that in subsequent sessions teachers would have an opportunity for a frank discussion of the assessment feedback and the possibility of challenging the assessment given.

Towards the end of 2003, the 2318 students on the UNISA NPDE programme were invited to participate in an anonymous evaluation of the programme from various perspectives. Of the 707 (30,5%) who submitted an evaluation form, 661 students provided a ranked response to an enquiry about the extent to which the contact sessions had helped them to be successful on the programme. On a scale of 1 to 5, with 5 being the highest rating, the weighted average was 4,84, indicating a high rate of value attached to contact sessions. One student commented that 'Most of us wouldn't have made it without the tutors' and in an open response section at the end of the evaluation form, 58/707 (8,2%) of students indicated that they would have liked more contact sessions.

However, the provision and management of these contact sessions was not unproblematic and the following problems arose from time-to-time:

- Data on where centres would be needed was often not available before such centres needed to be identified and booked. It has proved necessary to start the programme with centres in projected key regions (using not only UNISA learning centres but also booking rooms in technical colleges, teacher centres, schools and sometimes even church halls) and to then expand the number of centres as viable new groupings become clear.

- With at one time more than 25 centres operating in five different provinces, it was not possible to visit all the centres for quality assurance purposes. In the second year of the programme, some tutors were asked to assume an additional co-ordinating role as centre managers in larger centres. This proved to be a useful approach in most cases (albeit at an added cost for the extra hours and responsibility) but a complete disaster in one centre where the wrong person was chosen as centre manager and managed to single-handedly confuse and alienate the students, the other tutors and the people whose centre was being used.
- Occasionally, tutors failed to arrive for a planned session. However, tutors were required to submit attendance registers with their claims and this ensured that unexplained tutor absences were rare.
- Tutors were often good facilitators but not necessarily good assessors or administrators. Although tutors were required to submit mark-sheets by certain deadlines in order to claim for marking, and were also required to submit copies of marked assignments for moderation, many tutors failed to meet the agreed deadlines and as a result students did not always receive assessment feedback timeously. In addition, there have been a number of irregularities where students have apparently marked their own assignments or pressured tutors to accept and mark assignments long after the deadline had elapsed. For 2004, the roles of tutor and assessor have been de-linked and students have been required to post all assignments to UNISA for centralized marking.
- In addition to weaknesses in the administration of the assignments, a review of marked assignments (SAIDE, 2002) indicated that tutors had not been able to make full use of assignment feedback as a supportive learning strategy.

Clearly, some if not all of the problems outlined above could be addressed by more intensive tutor training. In general, UNISA tutors receive 2.5 days of training a year. In 2002, the programme manager met with tutors at the beginning of the year to orientate them to the programme, to their roles as tutors and to the first year modules; in the middle of the year, to reflect on observations of contact sessions, examples of marked assignments and challenges that had arisen; and then again towards the end of the year, to prepare tutors for guided marking of examination scripts. With some 60 tutors all offering the same module, it proved quite cost-effective for the programme manager to conduct such sessions in three main locations, namely. Pretoria, Nelspruit and Durban. In the second year, the number of different modules on the programme had grown to 39 and the number of tutors to 90, and it was necessary to add an additional training session for portfolio development for integrated assessment and assessment for recognition of prior learning (RPL). With so many different requirements, it was necessary to establish a programme team and either bring all the tutors to a central location or have the team travel to regional centres. The latter was chosen. In order to contain costs, it was not possible to do this twice in the year. A two-day workshop was offered prior to the start of the programme, and a half-day workshop for Gauteng-based tutors involved in examination marking was held in October/November 2003. Whilst it is clear that tutors required more training and support, it should be noted that UNISA had been requested to offer an NPDE programme that was as affordable as possible, and accordingly did so at a student fee that was less than half that of most other providers. Thus the UNISA NPDE has been offered under severely constrained budget limitations.

Attempts to offer school and classroom based support

In its original proposal, UNISA indicated that whilst classroom and school-based support was desirable, it would not be affordable at UNISA's standard fees as charged for the NPDE and that therefore additional funding would be required for classroom- and school-based support. However, no additional funding was made available. Offering a decentralized model of provision meant that UNISA needed to make use of tutors for this purpose. Given that on average a suitably qualified tutor costs R2 500 a day for time and transport, the extent to which any form of school visit could be accommodated was severely constrained. However, in order to provide some feedback on the impact of the programme it was planned that each tutor would visit one volunteer from their tutorial group on three occasions during the course of the year to observe, discuss and evaluate the cumulative impact of the programme on classroom practice. In the event, most tutors were unable to organize this since they were also teaching at the same time, and of those who were able to make such arrangements few were able to produce reports of any significant value. In future, it is planned that academic co-ordinators will conduct these longitudinal studies with 10 students. Attempts to involve district officials in a school-based assessment and/or mentorship role for the NPDE, have so far proved unsuccessful.

Provision of high quality study materials

Crucial to students' successful completion of the programme is that they receive study materials that are appropriate and accessible. The NPDE was launched in the same period that UNISA had to incorporate SACTE (South African College of Teacher Education) and SACOL (South African College for Open Learning), and accreditation for UNISA's NPDE proposal was received in September 2001 for a programme start in 2002. Thus for 2002 and 2003, UNISA chose to make use of the best available UNISA, SACTE and SACOL materials or materials published elsewhere and to develop in 2002 for 2003 only those materials for which no suitable source material could be found. During 2003, as a complementary process to the national NPDE evaluation process, UNISA embarked on its own internal review of the NPDE study materials. As a result of this process, three of the five first year modules have been replaced for 2004, about 50% of specialist modules have been substantially revised and eight new modules have been developed so that the UNISA NPDE now caters for all three primary school phases and all eight learning areas in the senior phase. In the student evaluation cited earlier, 15,8% (112/707) of students said that they had found **all** of their NPDE modules helpful in improving their practice and an astonishing 42,4% (300/707) indicated that **none** of their modules could be classified as 'least' helpful. As one student commented, 'All the modules were useful and brought a great change in my career. The modules are not separable because all of them they built a teacher in totality (in all aspects of teaching).' (sic).

Quality Criterion	**5.7**	The materials development plan includes provision for evaluation during the developmental process in the form of critical commenting, developmental testing or piloting.

Provision of formative and summative assessment

At UNISA, examinations are managed separately by specialized staff in the Examinations Department. For the UNISA NPDE programme, examinations are open-book since this seems a more appropriate way to examine applied competence. The examinations count for 50% of the final module mark with the other 50% coming from assignments (thus reinforcing the programme's message of finding a balance between formative, continuous assessment and summative assessment for reporting purposes). There were a few problems in 2002, when some invigilators were not familiar with the process of the open book nature of the NPDE examinations, when NPDE students found that a two hour examination did not give them sufficient time (subsequently it was changed to three hours) and when some very mature NPDE students felt offended when asked to be quiet in and when leaving the examination room. However, since the January 2003 supplementary examinations there have been no further problems in this regard. Students are required to get a final mark of at least 45% to qualify for a supplementary examination and most final results that are not good are due either to the fact that students performed poorly in both assignments and examinations or that not all assignments were submitted. The UNISA NPDE team has an open-door policy with regard to querying of final marks. Any assignment can be submitted for re-marking and any examination paper can be re-marked for a fee.

Running parallel to the standard process of assignments and examinations, UNISA NPDE teacher-learners are also engaged in the development of professional portfolios for integrated assessment and RPL purposes. The focus of these portfolios is lessons that are planned, taught and reflected upon and which are subjected to self-, peer- and tutor assessment. For some students, the development of a professional portfolio has been a particularly enriching experience, both personally and professionally, with one student commenting in her evaluation report: 'Apart from the structure of assignments which were so challenging and interesting, compiling the integrated assessment portfolio was very interesting to me. At first I thought it would be simple to do it, but I found it very challenging and it was really an eye-opener. It was as if I were a new teacher entering the profession. I would look at the learners' portfolios and selecting their best work was always fascinating. It inspired them and they would all try their best to write neatly and correctly.'(sic)

Quality Criterion	6.4	There is a range of formative and summative assessment tasks and methods which ensures that all learning outcomes are validly assessed.

Reflections on the support provided

The designers and producers of UNISA's NPDE predicted that the majority of teacher-learners would be under-prepared for independent study at tertiary level and, in general, this prediction has been confirmed. In 2004, tutors have been expected to make more use of the guidelines provided in the Language and Learning Skills module to help teacher-learners to engage meaningfully with their study material. They have also provided much more guidance and support to teachers in managing their study time. The general tutorial letters for the NPDE programme are integral to this process. At the same time, however, it is necessary to guard against spoon-feeding of content since one of the purposes of the NPDE is to provide teacher-learners with a pathway to studies at a higher level. Whilst continuing to provide motivational support and offering more systematic academic study skills development, the programme needs to retain an explicit agenda of fostering independent studying by empowering individual teacher-learners and their peer study groups to engage 'reflexively' with the materials provided.

Support related to access and information processes/needs

In general, UNISA's systems are predicated on an individual adult learner, who registers and pays for him/her self and who is highly self-motivated. Generally, students are required to pay half their study fee on enrolment and the balance in August, and students in arrears may be barred from their final examinations and/or may have their results blocked. In most UNISA programmes, submission of a number of assignments is a pre-requisite for examination entry and the final mark for a module is the examination mark. An increasing number of UNISA programmes offer some form of contact support and UNISA does have a Department of Student Support which offers general guidance and counselling services and can organize contact classes where significant numbers of students request them and are willing to pay an additional fee. However, the NPDE - with help of the Departments of Computer Services, Student Affairs, Assignments and Examinations - needed to establish new systems and procedures for dealing with extensive decentralized support and assessment and for reporting on groups of students. For 2002 and 2003, students were registered under three different account codes for Gauteng and Mpumalanga bursary holders and for self-financed students. Reports which summarized information on individual assignment submission and performance in examinations were generated on a quarterly basis.

The vast majority of students were able to progress through the programme with few problems, but there were some anomalies, such as:

- Students whose results were withheld because their application process was non-standard or their registration forms were incomplete so that they were not allocated to the bursary cohort and their accounts appeared to be in arrears;
- Bursary students who registered for the second year programme before getting their supplementary results and whose accounts were accordingly reported as in arrears and whose results were withheld even after they had paid their supplementary examination fees;
- Students who did not understand that their bursary did not cover repetitions of any kind and accordingly left it till very late to pay the outstanding supplementary examination fee and so access their results;
- Students who assumed that payment of the supplementary examination fee meant that if they were not successful that they would automatically be registered to repeat the module(s).

To accommodate these kinds of problems, the registration deadline for the NPDE was officially extended until the end of March (the registration period at UNISA usually closes at the end of the first week of February) and students who worked through the NPDE office directly were able to be helped back into the programme until the end of May. After the end of May 2003 it was no longer possible to accommodate late registrations because the student system needed to be closed for auditing purposes.

In their study packages, UNISA students receive a booklet entitled 'Policies and Procedures' which outlines what to do and whom to contact with respect to issues such as changing an examination centre. In addition, the general NPDE letters contain contact details for all NPDE staff (including cell phone numbers in most cases) as well as for the support service departments of registration, assignments and examinations. Unfortunately, it has been the UNISA NPDE experience that many students do not consult these resources and become frustrated, telephoning the general UNISA number for queries that could be better handled by contacting the relevant department or authority. Although the first contact session each year includes a session which focuses on these issues, some 30% of registered students each year choose not to attend the contact sessions.

Quality Criterion	**9.5**	There are effective systems of communication with current and potential learners.

In recognition of the fact that most NPDE students are likely to be teachers working in rural areas with limited access to information resources, UNISA has tried to make its NPDE programme as self-contained as possible. All resources required for assessment are supplied as part of the study package and no NPDE students are required to purchase additional study material. However, like all other UNISA students, NPDE students have full access to the UNISA library and services.

In the general tutorial letters, NPDE students are provided with a timetable of contact sessions for the year, whilst the module specific tutorial letters contain assignment deadlines. Each student also receives an individualized examination timetable.

All UNISA registration points provide information on fees and Edu-Loan financial support services.

Students who visit the main campus or one of the main satellite campuses have access to information technologies. (In Pretoria there are regular free training sessions for registered students on how to use these facilities).

In the NPDE programme, career planning is built into a compulsory first year module which deals with the new qualifications framework for educators and guides teacher-learners through the developmental appraisal process.

Support related to social and personal needs

Support available to all students

UNISA mainly relies on its calendars which are updated annually, to convey information about its programmes. In addition, there are staff at all UNISA regional offices and learning centres who have been trained to offer general guidance on UNISA programmes. There is a call centre for general enquiries and contact numbers for the NPDE office are freely available. Within the NPDE offices, there is always at least one person available for students who arrive to make enquiries without an appointment. If the junior programme administrator is unable to assist them, s/he can facilitate making an appointment to speak to the programme

Quality Criterion	7.14	Administrative staff are trained to be helpful, clear and consultative in the way they relate to and make arrangements for learners.

administrator or co-ordinator or one of the academic co-ordinators. Unfortunately, students very often refuse to speak to any one other than the person whose name they know.

Once students are registered on the NPDE programme they have the option, as noted above, of attending contact sessions and receiving the guidance of a tutor. Students also receive contact details of all the academic co-ordinators with whom they can discuss issues that they were not able to address locally with their tutor. Since most staff have also provided their personal cell-phone numbers, there should be no problem with contacting NPDE staff and, if necessary, setting up an appointment for an individual consultation. In addition NPDE staff respond to individual letters and enquiries that have been posted, faxed or emailed.

Quality Criterion	7.12	There are opportunities for individual academic support for learners either by telephone, by appointment or online.

A review of the contact details of UNISA NPDE students reveals that only two to three students a year have an e-mail address and, possibly, easy access to the Internet. Nonetheless, for 2004 all tutorial letters are available online as is some additional support material for the Intermediate Phase module ,Numeracy 1. Because the UNISA NPDE programme uses a wide variety of venues for contact sessions, the programme has been designed primarily as a print-based learning experience. However, for 2004, the first year study package has included a video, which is supplied to tutors who are responsible for either making arrangements for the video to be shown during a contact session or to manage a process of circulating the video among study groups at the centre.

One of the purposes of contact sessions is to help students to form peer support or study groups. The programme has found that these groups rarely continue outside the contact sessions, though there are some exceptions. The main difficulties appear to relate to finding common free-time and having access to reliable transport. These issues could be addressed if groups of teachers from each school could be encouraged to register for the NPDE. In the student evaluation cited earlier, several students said that they valued the engagement with their peers. As one student noted, 'I liked and enjoyed the contact session period, whereby our self-esteem were enhanced when we were together sharing ideas in different groups as old didactic educators.'

Support available to students with special needs

UNISA has a special unit devoted to promoting ease of access for students who need to overcome various barriers to learning. In 2003, for example, the NPDE had one student who was blind and was teaching both blind and partially-sighted learners in the Foundation Phase. For such a learner it is intended that study materials be supplied either on audio-cassette or typed into Braille. Although this process was started, the student concerned did not receive her converted study materials timeously and indeed, with the help of her colleagues, did much of the work of the conversion herself. Despite the challenges she nevertheless managed to: complete nine of the ten first year assignments, to submit both integrated assessment and RPL portfolios, and to pass three of the five first-year modules. In recognition of the particular challenges faced by this student, she was invited to Pretoria for a week and offered the opportunity of an oral examination for the two modules she had not been able to complete successfully on her first attempt due to inadequacies in the materials supplied. Similar alternative assessment arrangements were made for other students who had a good case to make for not having been able to meet the normal requirements of the programme. The UNISA NPDE has demonstrated that even in a large-scale distance programme, it is still possible to cater for individual needs when the programme is offered by people who share a common commitment and in which learners and staff are willing to meet each other half-way. As noted previously, however, a minority of students will attempt to exploit what they see as loopholes in a very flexible programme and so each case needs to be carefully scrutinized before any departures from the norm are sanctioned and create a precedent for subsequent engagements.

Conclusion

In general, the NPDE has been designed with the understanding that the target audience are mature people, with many years of practical classroom experience but probably limited academic study skills, that most will be studying in a language that is not their first language and that they represent a diverse range of cultures and contexts. In seeking to address these issues, the UNISA NPDE curriculum has an overt academic language skills development programme incorporated into the main stream course. In selecting tutors, preference is given to mature people who are able to code-switch when it is useful to do so. Contact sessions emphasize the use of small group discussion (which can be conducted in students' home language). Case studies and scenarios included in the materials try to be broadly representative and assessment emphasizes reflection on the teacher-learners' own classroom and context.

In the UNISA NPDE programme, teacher-learners are required to pass three or more of the five first year modules before entering the second year of the programme. This is to ensure that they meet the University's general requirements for a minimum number of credits passed in a particular period, to ensure that there is sufficient general groundwork done on which to build the second year specialist programme and to ensure that they do not carry so many modules that they become overburdened with academic commitments during their second year, which has the added workload of finalizing one or more portfolios.

Some 67% of the 2052 NPDE teacher-learners who registered for their first year in 2002 successfully met the requirements for entry into the second year programme in 2003 - a pleasing result in a distance learning programme for students who are in full-time employment. At the end of their second year many of these students still have one or two modules or some compulsory portfolio work to complete, but should graduate in 2004. 39% of the first cohort completed the two year programme in minimum time.

The breakdown of this throughput in minimum time is as follows:Gauteng Department of Education registered 910 students in 2002.

- 720 (79%) qualified and registered for year two in 2003.
- 499 (69% of those registered) completed in 2003.
- Overall throughput rate for Gauteng students in minimum time is 499/910 = 55%.

Mpumalanga Department of Education registered 1056 students in 2002.

- 566 (54%) qualified and registered for year two in 2003.
- 188 (33%) of those registered completed in 2003.
- Overall throughput rate for Mpumalanga students in minimum time is 188/1056=18%.

The equivalent pass rate among self-financed students is 199/286 = 69.6%.

These figures suggest that UNISA needs to find more effective strategies for motivating and supporting bursary holders in general and, in particular, for supporting students in more rural contexts.

From the experience of the first two years of the UNISA NPDE, it is clear that in future more attention will need to be given to the selection, training and monitoring of tutors; the development of teacher-learners' academic study skills and time management; the selection and management of centres; the quality of feedback on assessment. Further attention will also need to be given to strengthening the partnership with the Department of Education so that there is increasing synergy between what the Department expects and what the programme delivers and so that learner support functions can be optimized.

The last word is left for one of the 707 2003 NPDE students who submitted an anonymous evaluation form:

> 'What I learned is correlated with what I am teaching. I've changed totally and I feel great.'

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Endnote

1 The South African Council of Educators requires teachers to have the equivalent of a three year qualification after a senior certificate - commonly known as M+3 or REQV 13.

Case Eight: Peer Collaborative Learning at the former Technikon Southern Africa

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Editor's introduction

The peer collaborative learning project which this case study describes was motivated by a concern to improve overall institutional retention and pass rates at Technikon Southern Africa (TSA) - a concern captured in the 'Results' section of the quality criteria:

> **13.8** Sufficient numbers of learners complete the individual programmes and courses successfully to justify the cost in time and person power for the design of the programmes, courses and learner support system.

The case study is interesting because it attributes part of the reason for low retention rates to insufficient learner support, and reports on a project to improve **learner support** in cost-effective ways.

The quality criteria refer to peer support structures specifically - see quality criterion no 7:

> Learners are provided with a range of opportunities for real two-way communication through the use of various forms of technology for tutoring at a distance, contact tutoring, assignment tutoring, mentoring where appropriate, counselling (both remote and face-to-face), and the stimulation of peer support structures.

However, as the case study illustrates, the TSA peer collaborative learning project does more than simply 'stimulate' peer support structures. It aims to resource, organize, and maintain structures for peer support in subjects in which retention rates are particularly low.

Introduction

One of the greatest challenges for TSA, is the need to improve pass and retention rates of learners. Institutional research at TSA over the last few years indicates that current strategies are not adequately addressing this matter.

Various factors that could possibly contribute to lack of effective retention strategies at TSA have been identified as the following:

- Diminishing resources (funds and human capital);
- Lack of generic life skills and competencies amongst higher education learners;
- Dwindling number of learners;
- Entry level of learners registered;
- General absence of truly mature learners (‘adult learners’);
- Current teaching practice being more lecturer-centred than learner-centred;
- Lack of understanding among decision-makers regarding appropriate learner support in distance education;
- Lack of planning, co-ordination, integration and monitoring of current support strategies.

The transformation of higher education, lack of resources and the need for effective learner support strategies resulted in the adoption of peer collaborative learning (PCL) at TSA as just one possible intervention measure. Before considering PCL in any detail, a brief background to TSA is provided.

Technikon SA is a higher education and training institute consisting of four academic divisions (Economic and Management Sciences, Community Sciences, Public Safety and Criminal Justice and Applied Natural Sciences and Engineering) which offer formal courses ranging from certificate to doctoral level, reinforced by unique learner support technology.

In 2002 there were 58 170 learners registered at TSA. There was a staff complement of over 1 000 and more than 70 learning programmes. TSA also has 26 regional and branch offices throughout South Africa. Most of TSA’s learners are from South Africa, but there are also registered learners in Namibia, Botswana, Zimbabwe, Lesotho and elsewhere in Africa.

Over the years, and following the adoption of the integrated learner-centred distance education model, TSA has developed from a traditional correspondence institution into an educational institution aimed primarily at providing its learners with decentralized support wherever they might be.

Learners have a wide choice in terms of different staff to consult (advisors, lecturers, counsellors, tutors, markers, assessors, moderators, etc.); multiple learning sites (for example. at home, local libraries, learning centres, Internet cafes, the regional offices); and access to either face-to-face tutoring, or tutoring through use of various media (telephone and e-mail).

However, as a result of rapid changes in learner profiles, learner needs, curriculum design, subject content and technological developments, the well-established tutor system at TSA, intended as a means of academic support, has become somewhat less effective than was initially envisaged. In addition, retention and throughput rates on certain of the programmes are less than satisfactory. This has led to an investigation into alternative means of decentralized academic support at TSA. Peer Collaborative Learning is one of the interventions that has been explored.

Background of Peer Collaborative Learning

PCL is an academic support strategy aimed at assisting learners to understand the subject and improve their performance. It targets 'high-risk' subjects, or academic subjects that have generally proved to be difficult over the last three years.

Quality Criterion	7.22	Learner performance is monitored and learners at risk identified. Timeous educational intervention is provided for such learners.

According to Rochelle (1992:20), peer collaborative learning is a process of learning whereby a small group, together with a facilitator (peer) as an active participant, manages the learning session in such a way that there is a construction of shared meaning. Talking through concepts and experiences improves understanding of the subject for academic success and simultaneously enhances the intellectual, social and cognitive skills of the individuals involved.

Quality Criterion	7.1	Learners are encouraged to create and participate in 'communities of learning' in which the individual learner thinks and solves problems with others engaged in similar tasks.

Peer facilitators are usually senior learners who have performed well in the subject, and who can now help new learners. The kinds of support which peer facilitators give differ in a number of ways from tutorials offered as part of the learner support system across TSA as a whole. Apart from the obvious difference that PCL tutorials are run by peers who have themselves passed through the course rather than tutors/lecturers who are regarded as experts, the methodology in PCL tutorials differs from conventional tutorials in being oriented towards study skills and ways of tackling the subject in which participants are central to the learning process, asking and answering questions instead of waiting for questions from a tutor. One of the reasons for using peer collaborative learning is that it is based on a co-operative learning model, rather than a competitive one.

Since the first research study conducted as far back as 1898, there have been nearly 600 experimental and over 100 correlation studies conducted on co-operative, competitive and individualistic efforts (Johnson & Johnson, 1992:6). Based on research findings, it appears that co-operation, as opposed to competitive and individualistic efforts, typically results in:

- Higher achievement and greater productivity;
- More caring, supportive and committed relationships;
- Greater psychological health, social competence and self-esteem.

The idea of co-operative learning and collaborative teaching is supported by three theoretical perspectives. According to the first, the cognitive approach, which focuses on strategies of information processing, learning is maximized when learners 'act on information in ways that make it more meaningful', such as organizing it, making their own connections with it and applying it to new contexts (Svinicki, 1991:30). This active learning can be more easily achieved in small groups in which, in the absence of an 'expert', group members engage to help each other make meaning. The second perspective, motivational theory, is concerned with how learning is 'initiated and sustained'. It advocates giving 'responsibility for learning back to the students and using innovative methods' (Forsyth & McMillan, 1991: 55). Collaborative learning does both. Finally, from the third perspective, the kind of environment most conducive to learning is thought to be 'dialogue', characterized by interaction and co-operation. Learners are more willing to take 'responsibility for their educational experience' as compared with the traditional situation of teacher/lecture mode. In sum, collaborative learning, endorsed by all three theoretical viewpoints, appears to be the more promising approach (Billson & Tiberius, 1991: 23).

Initial implementation of PCL at TSA in 2002/2003

PCL was implemented on a fairly informal and regionally fragmented basis in 2002/2003, and a great deal was learned from the process.

The PCL process involved a broad spectrum of stakeholders and necessitated the development of certain procedures to give structure to the informal programme and to eliminate opportunities for irregularities. Procedures were developed to identify:

- Appropriate facilitators and learners to be involved in the strategy;
- Subjects for which PCL should be used.

Procedures for payment and for scheduling of sessions had to be developed. Sessions were scheduled according to the profile of the learners at each TSA branch office/centre. Employed learners could attend classes in the evenings and on Saturdays, while unemployed learners could attend classes during normal business hours. Peer collaborative learning sessions were organized at TSA learning resource centres, so that learners could have access to resources and facilities available there.

Quality Criterion	7.5	In selection of venues and times for contact sessions, travel time and expense for learners are considered. Care is taken to place suitable sites of learning close to where students live/work.

Even from the initial rather fragmented implementation of PCL in 2002 and 2003, there were a number of benefits. Evaluations revealed that cognitive support as well as affective and social support goals were achieved. Almost all learners who participated in the PCL programme submitted the compulsory assignment as summative assessment to obtain a year mark, which means that they were granted admission to the examination.

However, several learners dropped out of the programme after submitting their compulsory assignment. This means that although these learners obtained a year mark and admission to the examination, they missed out on the benefits of an important aspect of the work, namely examination preparation. There were also some problems with attendance. After-hours attendance was hampered by safety and security concerns, for example using public transport/taxis to travel to a township after a class. In addition, some learners who were employed, could only attend the evening sessions.

Refinement of pilot for 2003/2004

As a result of the successes of the first pilot, the approach was piloted again with first year learners registering for a PCL course during the second registration cycle in August 2003. The purpose of the second pilot was to develop PCL as an integrated academic and learner support programme with policies and procedures in place for the institutional management of PCL and a training manual consisting of 11 units covering various topics such as PCL teaching and learning strategies, and the formation and functioning of groups. In addition, it is intended to publish the results of the PCL intervention, indicating the effectiveness of the learners' learning experience. The various policies and procedures are thus much more refined and carefully documented than was the case with the initial implementation.

Selection of PCL facilitators and subjects in which PCL will be used

The selection of PCL-leaders and the selection of subjects to be facilitated were seen as two critical success factors in this project.

Quality Criterion	**8.13**	Arrangements are in place for the proper recruitment, training, monitoring and payment of the necessary part-time and contract staff.

The following set of criteria was identified for the appointment of facilitators. PCL appointments should:

- Reflect the demographics of the particular region;
- Be second or preferably third year learners in the applicable subject;
- Be current learners registered at Technikon SA;
- Have obtained at least 60% in the applicable subject;
- Be multilingual;
- Have good interpersonal skills.

The subjects used in the PCL pilot were identified by TSA Regional Academic Managers on the grounds that learners find them particularly difficult and that the drop out rates in these subjects are high. These subjects include: Financial Accounting, Marketing, Economics, Business Management, IT skills, Business Law and Personnel Management.

Critical phase intervention strategy

The PCL operating procedures were designed around the critical phases for a learner within one academic year. The rationale for using the critical phases was to help identify the various reason(s) why learners drop out. The most prominent reason cited for learner cancellations at TSA is 'personal reasons' which accounts for approximately 55% of cancellations. As PCL focuses on both cognitive and affective aspects of learning, it has potential to address at least some of the personal reasons for course cancellation.

Quality Criterion	**7.21**	Before each critical phase of a course/programme, each learner is contacted and encouraged to participate.

Within the academic year of a distance education learner, there are a number of critical phases or hurdles that learners must overcome. The principle that is applied is to pro-actively schedule PCL sessions before each critical learning event. This is a departure from a remedial type of intervention in which the learner is only assisted after a failed learning experience.

The following diagram shows these critical phases.

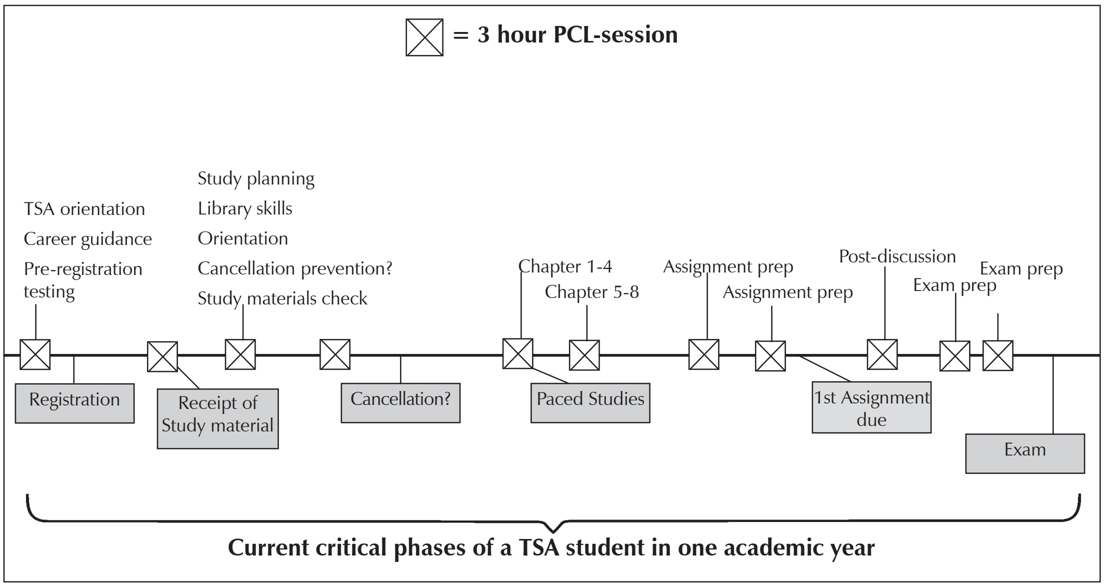

Figure 1: PCL critical phase intervention strategy: from remediation to pro-active

Critical phases are indicated in the grey blocks. It should be noted that there are a number of subjects where one or more assignments are written and in such cases PCL sessions are scheduled before the due dates. It should also be noted that sessions are scheduled before each learning event - the emphasis therefore is on pro-active intervention rather than on remediation after the learning event. Through this strategy the distance education institution can scaffold and support the learner during critical periods in his/her studying career.

Quality Criterion	**9.8**	Appropriate schedules are developed for all activities forming part of the distance education system, with due attention given to lead times needed to meet deadlines.

Table 1: Typical timetable for PCL

No.	Tutorial session/activity (each session is three hours)	Date
1	Start of PCL registration: General info session	7 Sept 2003
2	General TSA orientation	30 Sept 2003
3	Study management: (Study plan, materials, library orientation, cancellation issues, etc.)	13 Oct 2003
4	Chapters 1-4	27 Oct 2003
5	Assignment preparation (1)	19 Nov 2003
6	Assignment preparation (2)	10 Jan 2004
7	Post-assignment discussion	31 Jan 2004
8	Chapters 5-9	26 Feb 2004
9	Chapters 10-14	17 Mar 2004
10	Revision (1)	31 Mar 2004
11	Revision (2)	15 April 2004
12	Examination preparation (1)	29 April 2004
13	Examination preparation (2)	5 May 2004
14	Post examination session	

In addition it was planned that the subject lecturers themselves would facilitate at least three sessions, particularly around assignment preparation and examination preparation, but this did not happen due to lecturers' work pressure. It has been suggested that perhaps regionally appointed tutors could support the peer tutors in this way.

Preparation for each PCL session

The PCL facilitators are supported to implement the above approach to co-operative learning by careful session by session preparation, integrating main campus lecturer, regional academic manager and regional tutor.

The PCL facilitators are themselves learners who, in most cases, have been exposed to classroom expository teaching by a teacher during their long school careers. It was observed in previous sessions that the PCL facilitators all too often reverted to the 'teach and tell' method - a methodology they were exposed to for over twelve years of schooling.

It is therefore important to design and to develop session preparation to structure the three hour long PCL sessions in ways that include meaningful activities. These activities will lead, prompt and assist the PCL facilitator to manage the group, rather than to teach the group.

The main part of the session preparation form is completed by the subject lecturer at the main campus. The session preparation form is then passed on to the various regional academic managers in the various regions, who then in turn refine the session preparation form together with the regional tutor and the PCL facilitator.

Quality Criterion	**7.6**	Tutors are selected and trained for their crucial role in encouraging active engagement of each learner in the course/programme.

The session preparation form contains four sections, the functions of which are as follows:

1. **Pathfinder Activity**
   During this activity, generic academic skills (critical cross-field outcomes) are facilitated. Learning management skills (for example setting a study timetable) are emphasized. For example, groups might compile a table on the topic of 'School learning vs Distance education' to highlight some of the challenges that they face; or make a year planner with deadlines for important activities, and extend this into a monthly and even a weekly planner.
2. **Subject Specific**
   The learner is paced through the academic year by 'chunking' the subject matter into manageable parts. The learner is then paced through the academic year. For example, learners discuss negative and positive perceptions of the subject, look at what is expected of learners in relation to prescribed or recommended books, discuss activities completed in preparation for the session (such as summaries of certain sections or definitions of concepts, or reports on field visits).
3. **Long-term Examination/Assignment Planning**
   The habit of many learners to wake up a day before the examination and then get into a 'cramming' session is well known. Long-term assignment and examination preparation already starts at the first session and is reinforced within each PCL session thereafter. For example, in an assignment preparation session, groups might review a list of frequently used terms in assignment/examination questions, and analyze the assignment topic together, word by word. Or they could review a past paper, and together prepare a memorandum for it.
4. **Homework Assignment**
   It is important for learners to be prepared for the next session. By arriving prepared at the next session, learners can transact and construct meaning and actively contribute to the group. Examples of such homework assignments include thinking of personal examples of concepts discussed in the study materials, or discussing study timetables with friends and family.

Feedback on success of PCL sessions

Quality Criterion		
	7.24	Feedback is sought from tutors/ mentors as well as from learners for the review of courses and programmes.

Feedback from the learners is obtained via a questionnaire that is filled in by learners after each session.

The following comments were compiled from the questionnaires (Report compiled by Lehlohonolo Rakhomo, Period: Four months - December 2003 to mid-February 2004 Date: 20 February 2004).

- Learners highlighted that collaborative learning provides several opportunities to interact, practise, learn and to understand the need for working in a group. Working in groups forces members to put in greater effort in order to be at the same quality level as the rest of the group.
- Learners discovered that PCL could be a good friendship builder and it allows them to get to know other people. This learning approach is very productive as learning is not only through study materials, it takes place alternatively from teammates.

- PCL is a very enriching process for both facilitators and learners. It is rewarding that learners learn by themselves, learn more, learn interpersonally, feel more involved, and feel more dedicated and more confident.

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Case Nine: Tutor learning, student learning: the B Ed Honours programme at the University of KwaZulu-Natal

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Editor's Introduction

While there are references to other aspects of the programme - such as recruitment of students, administration and quality assurance - in this case study the focus is on (i) the contribution of assessment policies and practices and (ii) the roles of tutors in supporting the learning of B Ed Honours students. The authors offer a detailed account of the assessment processes and of the substantial tutor development work done by senior programme staff to facilitate tutors' success as supporters of student learning. They argue that while investment in tutor development adds to the costs of the programme, it has substantial benefits for both tutors and students. The case illustrates how the following key elements of the quality criteria for **assessment** and for **learner support** are addressed:

6.1 Assessment is recognized as a key motivator of learning and an integral part of the teaching and learning process. It is used to inform teaching practice and to inform the curriculum.

6.11 Where part-time tutors are involved in assessment, they are trained for the task, and academic staff monitor and moderate both formative and summative assessment to promote reliability and fairness.

7.6 Tutors are selected and trained for their crucial role in encouraging active engagement of each learner on the course/programme.

7.8 The tutor/learner ratio is sufficiently small to enable tutors to know their learners as individuals, be able to support them in their studies, and monitor their progress.

The authors have included two appendices which may be of interest to other distance education providers. Appendix 1 offers generic assessment criteria which can be used across a range of assessment types. Appendix 2 is a copy of the tutor contract used in the B Ed Honours programme at the University of KwaZulu-Natal.

Introduction

Since 1999 the School of Education, Training and Development at the University of KwaZulu-Natal has offered the Bachelor of Education Honours degree as a distance learning programme with regular tutorial support. The B Ed Honours is a post-graduate qualification for teachers who already have a four year teaching qualification. It is offered part-time over two years through a combination of Saturday tutorials at regional learning centres and independent study from self-instructional material.

The programme began as a partnership with the South African College of Teacher Education (SACTE) which was based in Pretoria. In 1999, tutorials were offered at twenty seven regional learning centres in Gauteng, Limpopo, Mpumalanga, Eastern Cape and KwaZulu-Natal with a total enrolment of 1900 students. The partnership ended in August 2000 when SACTE was incorporated into UNISA. After that it was no longer possible to enrol students who did not live in KwaZulu-Natal, and the number of regional learning centres decreased. In 2004, there are a total of 525 students enrolled at seven regional learning centres in KwaZulu-Natal. Tutorials are offered in Durban, Empangeni, Kokstad, Newcastle, Ladysmith, Pietermaritzburg and Vryheid.

Quality Criterion	**7.5**	In selection of venues and times for contact sessions, travel time and expense for learners are considered. Care is taken to place suitable sites of learning close to where students live / work.

Prior to 1996, only teachers who had a degree and a professional qualification could enrol on the B Ed Honours. This meant that most students were secondary school teachers, since they had a degree. The National Qualifications Framework opened access to all teachers with a four year diploma qualification. This has changed the student profile so that the majority of students are now primary school teachers and do not have a degree. The profile of students in 2003 (n = 570) showed that 71% were women, 83% taught in the General Education and Training band and 8% had English as their home language. In 2001 (n = 554), 17.5% of students had a degree (these figures are not available for the 2002 cohort of students).

After the completion of the comprehensive marketing campaign implemented with the initial launching of the B Ed (now B Ed Honours) programme in 1999, a survey clearly indicated that word of mouth was by far the most effective way of making students aware that the University was offering the programme. In the light of this, and the prohibitively high costs of radio and newspaper advertising, marketing of the B Ed Honours for 2004 was primarily done by handing each of our present students two envelopes which contained a letter of introduction, an information booklet, a registration form and a deposit slip. They were asked to hand these 'information packs' to friends who might be interested in further study. These 'information packs' were also sent to all students who asked for information. The role of the information booklet is to inform students comprehensively on key aspects of the curriculum and rules before they decide to register.

Quality Criterion	**9.9**	The enrolment practices include provision of accurate, helpful information to prospective learners.

In addition, copies of a pamphlet providing very limited information on all the programmes offered by the School of Education, Training and Development, were posted to the 6000 schools in KwaZulu-Natal. There is no evidence that this action had an appreciable impact as the number of recruits remained very similar to those for 2003.

The B Ed Honours programme

Quality Criterion	7.9	There are sufficient contact sessions to ensure that the learners are able to achieve the outcomes of the course.

Quality Criterion	7.10	These contact sessions are integrated into the course design, rather than being an add-on extra.

Quality Criterion	7.11	The teaching and learning activities at contact sessions acknowledge learners' existing knowledge and experiences and provide opportunities for guided integration of the new knowledge and skills as contained in the course materials.

The B Ed Honours Professional Development Studies programme offers a fixed curriculum of eight modules. These are: *Reading and Writing Academic Texts, Psychological Perspectives of Teaching and Learning, Assessment, Curriculum Studies, Leading and Managing a Learning Organization, Classroom Studies, Environmental Education* (students in Pietermaritzburg may choose Teaching in Adult Basic Education instead of Environmental Education) and *Understanding Research*. Most students study two modules per semester. Examinations are written in the July and December school holidays. For each module there are 21 hours of tutorial contact time, divided into three six-hour sessions, and one three-hour session.

The purpose of the tutorial sessions is to deepen and extend students' understanding of the learning material which is the 'teacher' and to provide a place for students to meet with colleagues and to articulate their understanding of concepts.

Designing and implementing assessment policies and practices to support learning

Assessment strategy

The B Ed Honours programme has both an academic and a professional focus and the two do not always sit easily together. There are on-going discussions amongst programme staff as to whether we should be assessing teachers' ability to craft coherent academic texts, or their ability to apply new theories to their own classroom practice, or both. A recurring debate is how much weighting to give to the structure/form of a piece of writing and how much to the content. Staff feel strongly that students cannot be assessed on the structure and form if these are not explicitly taught. Thus the curriculum has recently changed to include a module titled *Reading and Writing Academic Texts* which explicitly teaches the stages of an academic essay, as well as strategies to achieve coherent writing. For this module, the assessment tasks are the drafting and re-writing of a coherent essay in the genre of an academic argument.

Quality Criterion	7.2	Academic support is built into the design of the course materials.

Other modules have assessment tasks which do not require students to construct an academic argument, but still require coherent writing and clear communication. For example the module *Psychological Perspectives of Teaching and Learning* requires students to analyze a case study using the theoretical concepts they have learned. The *Understanding Research* module requires students to critique and evaluate a research article. Generally assessment tasks have a strong emphasis on requiring teachers to use the theoretical concepts that they are learning to reflect on and to evaluate their own practice.

Quality Criterion	**6.2**	Assessment information (including learning outcomes, assessment criteria as well as assessment procedures and dates) is provided in all courses, modules or topics.

The programme uses both formative and summative assessment. All assignment tasks and assessment criteria are set out in the Student Guide for the relevant module.

For each module, **formative assessment** consists of Assignment 1 and four portfolio tasks. Assignment 1 and the first portfolio task are submitted at the first tutorial session, and the other portfolio tasks are submitted at subsequent tutorial sessions. The purpose of the portfolio tasks is to help students to keep working steadily throughout the semester, and to give them an incentive to work meaningfully through the Learning Guide. Portfolio tasks also serve a developmental function in that they give students feedback throughout the course as to whether they are understanding key concepts. They also give students the opportunity to practise writing. Portfolio tasks are typically short pieces of writing (one page) which may require students to summarize the key ideas from a reading, or a unit of work, or to respond to a case study, or reflect on their own practice using new theoretical concepts they are learning. These tasks are sometimes assessed by the tutor, or may be self- or peer-assessed during tutorial sessions.

Quality Criterion	**6.6**	A range of parties is involved in assessment of learners.

Assignment One is also a short piece of writing (1 page) which is usually self- or peer-assessed in the first contact session. Its purpose is to ensure that students come to the first contact session having studied the required units of the Learning Guide. It also gives students immediate feedback at the first contact session, so that they can ascertain if they are 'on track' with the course so far. A student is given 1% for submitting each of the four portfolio tasks and Assignment One, and these contribute 5% to the final module mark.

Assignment Two is a longer piece of writing (typically 4 pages). It is worth 10% of the final module mark. Students submit Assignment Two at the second contact session. Assignment Three is worth 20% of the final module mark and is submitted at the third contact session. This final assignment is a task that requires students to integrate their learning over the whole module. If students are not able to attend the session, they post their assignments to the University.

Quality Criterion	**6.4**	There is a range of formative and summative assessment tasks and methods which ensure that all learning outcomes are validly assessed.

Summative examination papers are set on the principle that no more than 20% of the paper should consist of questions that require recall only, and that a minimum of 30% of the paper must be allocated to a piece of extended

Quality Criterion	**6.12**	The assessment strategy includes systems for internal and external moderation that meet the requirements of the accreditation body.

writing. Examination papers are submitted to a Curriculum Committee made up of module co-ordinators, and are evaluated by colleagues in terms of the clarity of the questions, the higher order thinking skills that are being assessed and the transparency of the assessment criteria. Examination papers are then re-worked by module co-ordinators before they are submitted to the external moderators for comment.

The summative examination is worth 65% of the final module mark. We are often criticized by students for having such a heavy weighting on the examination. There are two key reasons for this policy decision. First, the University rule states that if the coursework counts for substantially more than one third of the final mark, it must be externally examined. It would be very difficult to have the course work of 250 students externally examined. As it stands at present, the examination is externally examined. The second reason is that it is not possible to know whether assignment work is genuinely the work of the student who hands it in, especially since many students work together in informal study groups. In an examination, the student is not able to receive outside assistance.

Supporting the development of tutors as competent assessors

Assignments Two and Three and the examination scripts are marked by a panel of tutors at the university. All tutors contracted for the delivery of a module are expected to mark Assignment Two, as it is seen as an important learning and developmental process for tutors, and also gives them insights into problems that students in their tutorial group may have with some key concepts. Module co-ordinators can then evaluate any difficulties that certain tutors may be experiencing as markers. For example, some tutors are slow readers, and thus are slow markers. Specific tutors are invited to be part of the marking panel for Assignment Three and for the examination. Module co-ordinators choose the most competent markers to be part of these panels.

Quality Criterion	**6.10**	Staff involved in assessment are assessment-literate and competent to assess student learning at the level required by the programme.

The panel marking process begins with a standardization process. The module co-ordinator copies three different assignments or examination scripts for each tutor. The assessment criteria are distributed and discussed. The programme has a generic rubric of assessment categories. (See Appendix 1). A module co-ordinator may adjust the rubric to fit the content of a specific assignment task more accurately, or may use the rubric together with a set of discrete assessment criteria. These assessment criteria are given to students together with the assessment task.

Quality Criterion	**6.11**	Where part-time tutors are involved in assessment, they are trained for the task, and academic staff monitor and moderate both formative and summative assessment to promote reliability and fairness.

Once the criteria have been discussed, each tutor marks the three sample assignments or examination scripts. Then each assignment or script is discussed in terms of the mark category to which it should be assigned. These discussions are vital, as each tutor needs to come to a common understanding of how the assessment criteria are applied and interpreted. This standardization process can take up to two hours.

Once tutors begin to mark the assignments or scripts, the module co-ordinator begins the moderation process. Thus a percentage (10 - 20%) of each tutor's work is moderated 'in process', rather than a batch of scripts being moderated at the end of the day. The module co-ordinator can immediately discern if a tutor is applying criteria too strictly or too leniently. The co-ordinator can also monitor the type of comments that the tutor writes. Tutors are encouraged to use their comments to 'coach from the margins' and both to encourage students and give them explicit guidance on how to improve their work. Unhelpful comments such as 'unclear' or 'what do you mean here?' are discouraged.

Cost of panel marking

Panel marking by tutors in a centralized venue is described by the Minimum Targets for Distance Education in South Africa document as 'best practice' (see Section Two). Certainly the staff on the B Ed Honours programme would agree that it is the best way to promote reliability and fairness. However, this practice comes at a price. Using an example of nine tutors coming to the university to mark 250 scripts, the total cost at the time of writing was R13 260, which includes one night's accommodation and travel expenses for six tutors (assuming that three tutors live in Pietermaritzburg). This translates into a cost of R53 to mark each script, of which R30 is paid to the tutor. It does not include the cost of the module co-ordinator.

If tutors did not come to Pietermaritzburg to mark, the cost would be R30 per script, which is paid to the tutor. However, experience has shown that when scripts which have been marked by individual tutors are returned to the module co-ordinator for moderation, many have to be remarked due to inconsistencies and inadequate understanding of criteria. Thus 'in-process' moderation at a panel marking session results in higher levels of reliability and fairness.

Feedback to students

Individual assignments contain specific comments which should enable students to see clearly how they have met or not met the assessment criteria. From a student evaluation (n=182) of the *Understanding Research* module in 2003, 92% of students said that they found that the feedback on their assignments was constructive and useful. 70% said that they understood why they received the marks that they did for assignments. This means that there are still a number of students who do not know why they receive a particular mark. This may be because they are unable to recognize the criteria, although these are made explicit. It also means that markers need to work harder to ensure clear and useful feedback goes to each student.

In addition to comments on individual assignments, each student receives a general feedback letter which accompanies the assignment. This letter is written by the module co-ordinator and explains to students the nature of common mistakes in the answering of the task and models the type of answer that was expected.

The second assignment is returned to students two weeks before the third assignment is due, so that students can make use of comments to improve their performance on the final assignment.

Quality Criterion	**6.13**	Marking procedures for both formative and summative assessment ensure consistency and accuracy of marking, grading, and provision of feedback to learners.

Contestation of results

Very few students contest the marks that they receive for assignments. Those that do, phone or write a letter to the module co-ordinator, who deals with the complaint. However, the programme director does receive a number of letters (from about 5% to 10% of students) once the promotion results of a module are released. These letters usually request that the university give the student a condoned pass on a module, regardless of how low the mark awarded. The University rule is that scripts cannot be re-marked. However, students may see their examination scripts in order to see where they failed to meet the requirements for a pass. If students are not able to come to the university, the module co-ordinator writes a short letter explaining which questions were well-answered and where the student failed to meet the requirements of the paper.

Quality Criterion	**6.15**	An appeal system is in place for when students have a complaint about the fairness of the assessment.

Tutor selection, training and support: in support of student learning

Although elements of the quality criterion for learner support refer to a range of factors, the discussion here focuses on tutors and the quality assurance mechanisms which govern their participation in the B Ed Honours programme.

In any de-centralized, mixed-mode model of delivery, the success of a programme/ course depends critically on the effectiveness of tutors to facilitate the learning process. The B Ed Honours programme is totally dependent on tutors to carry the conceptual, theoretical and applied thrusts of a module, as articulated in the learning materials, to students. The attention given, therefore, to the selection, training, support and development of tutors is considerable and will be outlined below. However, despite commitment to delivering a quality programme, there are still areas in need of further attention. These will be indicated at relevant points in the discussion which follows.

Selection of tutors

Quality Criterion	**7.6**	Tutors are selected and trained for their crucial role in mediating learning from the course materials.

Tutors who apply to teach on the B Ed Honours programme, must have, in the first instance, a minimum of a B Ed Honours degree or equivalent, and teaching/ field specific experience. 'Field specific' experience here refers particularly to tutors teaching on the *Environmental Education* module and/or the *Adult Basic Education* module. As few school-based educators have experience in teaching in these two fields, tutors are sometimes drawn from outside the school context. However, the vast majority of tutors on the programme are teachers.

Prospective tutors submit Curriculum Vitae, and these are kept on file for future consideration even if tutors are not appointed. All tutors, when first appointed, are invited to state their preference for the module they would like to teach on. Although it is not always possible to give all tutors their first choice, most are placed according to their preferences. As the B Ed

Honours has been running for several years now, many tutors have found a particular module niche for themselves, and as a consequence have been re-appointed each semester in which that particular module is offered. This has not only given rise to an increasingly stable tutor body in several modules (a very desirable goal in mixed-mode programmes), but also facilitated immense personal development and growth for tutors themselves. Tutors in several modules now contribute as much to curriculum thinking and development, as do module and programme co-ordinators, a context which serves the academic integrity of the programme extremely well.

Once tutors have been appointed, they are required to sign a contract which spells out all their responsibilities, as well as the financial and practical implications of not fulfilling these. (See Appendix 2). One copy is given to the tutor, and one copy is lodged in the tutor's file which is kept in the administration section of the School.

Quality Criterion	**7.24**	Feedback is sought from tutors/ mentors as well as from learners for the review of courses and programmes.

Quality Criterion	**7.23**	Performance of tutors and attendance of tutors and learners at contact sessions is monitored regularly. Monitoring data is analyzed and acted upon.

Each tutor completes an evaluation form at every contact session. These are returned to the distance education office with student attendance registers.

Office staff submit evaluations to module co-ordinators, distance education administrators determine whether tutors have attended contact sessions and, if informed beforehand of tutor absence, make alternative arrangements for students and adjust the payment of tutors.

Programme staff have recognized for some time that an ideal selection process should also include an interview with a prospective tutor and/or the completion of a 'selection task'. Unfortunately, until 2003, and for reasons mostly related to too few full-time academic staff being appointed to the programme to manage such a process, this was not possible. However, in 2003, this process began in one module and will be extended to all modules by 2005.

What constitutes an effective selection task has been the subject of much discussion within the programme. Content/conceptual module knowledge is one key competence required of a tutor. Another is the ability to respond to student writing constructively and according to the kinds of criteria already established in the programme; that is, with a balanced emphasis on meaning and form, within a context of predominantly English additional language speakers. There is a range of possibilities for tasks. The task designed for the module whose staff implemented a selection process for 2004, required prospective tutors to read the prescribed module texts, and then respond to key questions set by the module co-ordinator. In order to answer these questions, tutors had to demonstrate the ability to synthesize and analyze texts at an advanced level, and apply theory to practice. On the strength of their performance, they were either appointed or not.

Other types of selection tasks that are likely to be set in the future include 'marking' a small number of student assignments, and/or designing contact session activities that would profitably extend students' knowledge of a module. These tasks have been identified as those which might most effectively identify the kinds of tutors the B Ed Honours programme wants:

tutors who engage fully with the reading texts i.e. who can synthesize and analyze a range of different points of view, who are sensitive to, and informed about working within an English additional language context, and who adopt an interactive and learning centred approach in their teaching.

Quality Criterion	7.8	The tutor/learner ratio is sufficiently small to enable tutors to know their learners as individuals, be able to support them in their studies and monitor their progress.

The programme has an ideal tutor: student ratio of 1:25. In some regional learning centres, where there is only one group of students, the group may comprise only 15 students. On average there are 12 tutors on a module which is offered to approximately 250 students.

Initial tutor training

Tutor training usually runs for one and a half to two days over a weekend, well before the first contact session of a semester starts. As the University of KwaZulu-Natal runs a fully semesterized B Ed Honours programme, tutor training takes place twice a year. All tutors are brought to Pietermaritzburg and accommodated in local hotels and/or bed-and-breakfast establishments. All costs for accommodation and travel are borne by the School of Education. Tutors are paid R4 500 per semester to attend tutor training, tutor for 21 contact hours, mark Assignment One and the portfolio tasks on their own, and panel mark Assignment Two.

The following figures reflect the costs involved in the B Ed Honours tutor training session held in February 2004. The total cost (travel, food and accommodation) of training the 48 tutors was R34 120, of which the greatest cost was travel claims at R22 400. This works out at R35 per student on each module. It does not include the remuneration of tutors, co-ordinators and administrative staff.

In preparation for a tutor training weekend, tutors are expected to be fully conversant with the Learning Guide, the Student Guide, and any other materials specific to a module. In addition, tutors must complete Assignment One, and often Assignment Two (or any other of the tasks set for students that a module co-ordinator deems relevant for tutors to complete). This requirement is based on the premise that it is only when one attempts to write a set assignment oneself that a full realization of the demands of the task become apparent. Having a sizeable set of completed assignments with which to work during training (there is always a small number of tutors who, for one or other valid - or invalid! - reason, do not bring completed assignments), allows a module ‘team’ to collaboratively engage with the many issues embedded in what it means to ‘respond to writing’.

Quality Criterion	7.6	Tutors are selected and trained for their crucial role of teaching on assignments by giving constructive feedback.

Quality Criterion	7.7	Tutor training places particular emphasis on equipping tutors to analyze and assist learners with language and learning difficulties.

As indicated in the discussion on assessment above, determining what constitutes an appropriate grade for an assignment, and reaching consensus on this, is no simple matter. At tutor training, because this is the first time a particular constellation of tutors comes together, considerable time is spent on this aspect of the teaching and learning process.

The success of a tutor training weekend depends critically on a module co-ordinator's capacity to create a meaningful programme, and deliver this within a context characterized by ease, harmony and collegiality. The very short period allocated to tutor training means that time is spent in an intense, unrelenting engagement with teaching and learning processes. There needs to be a sound relationship between module co-ordinators and tutors in order to sustain tutors' interest, concentration and co-operation.

While the present tutor training system has served the B Ed Honours programme admirably for a number of years, an extended training period (either two successive weekends or a four day residential component) would lead to a richer and more 'embedded' teaching and learning experience than is currently the case. Unfortunately, in a programme such as this one, there are simply no further opportunities to appropriate more time in the calendar year. While this might be seen to undermine the effectiveness of the programme, it is hoped that tutor support and development which follows training, counters this possibility.

On-going tutor support

The responsibility for providing academic support for tutors rests with module co-ordinators, who are in turn, supported by each other, the programme director, and the qualifications director. 'Support' in the context of the B Ed Honours programme, means firstly, that a module co-ordinator keeps in close contact with her/his tutors - telephonically and/or through fax/e-mail - and is available at any time for consultation. Secondly, tutors are supported through the visits which module co-ordinators make to regional learning centres while contact sessions are being held. As there are seven regional learning centres, a module co-ordinator may only visit a centre once during a semester. Nevertheless, tutors regard a visit as very important as it gives them an opportunity to clarify any uncertainties they may have about the module/ student issues, and get feedback from module co-ordinators on their performance. Each module co-ordinator is required to compile a written report on tutor observations s/he has conducted during a visit to a regional learning centre, a copy of which is given to the tutor concerned. Another copy is filed in the tutor's file at the university.

The panel marking contexts established for assignment and examination marking provide further support to tutors. At these sessions (which may last one or two days), tutors and module co-ordinators have another opportunity to spend focused time with each other - beyond that dedicated to assessment issues - and address new concerns that may have arisen during the semester thus far. The extensiveness of the tutor support system now operating in the B Ed Honours programme thus provides numerous opportunities for quality assurance.

Sustained tutor development

In many respects, tutor support and tutor development are synonymous for it is difficult to imagine that the tutor support processes outlined above do not contribute to their conceptual and theoretical development, and the development of their teaching/ facilitation skills. However, the degree to which this development takes place,

Quality Criterion	8.8	Staff development is regarded as the responsibility not only of the individual, but also of the particular department (programme) and educational provider in which the individual works.

depends mainly on how long a tutor stays on the programme, and more specifically, how specialized they choose to become, that is, by focusing their energies on one module (and certainly not more than two modules) and the level of commitment that they bring to the programme. No-one should be under any illusion that people elect to take on part-time tutoring work over and above a full-time job and family demands for purely altruistic reasons. Many tutors on the B Ed Honours programme do so primarily to earn additional income. However, anecdotal evidence suggests that tutors stay on the programme for a number of different reasons: they enjoy the opportunity to teach adults, they find the experience personally enriching, they gain new knowledge and experience and they feel that they are part of an important process of teacher development.

It is hoped that these descriptions have provided some insights into the attempts of the B Ed Honours staff to promote quality teaching and learning in a mixed-mode programme at a face-to-face institution.

Appendix 1: Assessment categories and descriptions of University grades

Although each assignment will usually have specific assessment criteria, these are the general assessment criteria applied to the marking of exams and assignments.

%	Broad description	Detailed description
0% - 29% FAIL	EXTREMELY WEAK	Random points which can be give minor credit; poor or no referencing; serious language difficulties.
30% - 39% FAIL	WEAK	Hard to understand; sketchy; clear misunderstandings of key points; serious omissions and mistakes; no attempt to analyze; no evidence of reading; no or poor referencing; possible serious language difficulties; serious plagiarism.
40% - 49% FAIL	NOT SATISFACTORY	Unclear; unstructured; lacks understanding; important omissions and flaws; no comprehensible argument or analysis; poor or no referencing; possible language difficulties; serious plagiarism.
50% - 59% PASS	SATISFACTORY	Intelligible; covers main points; lacks firm structure; shows understanding of key points; indicates reasons, but thin and flawed; repetition of course material; poor referencing; possibly some language difficulties; maybe a little plagiarism.
60% - 68% PASS	SOUND	Clear; covers main points; well structured; sticks to the topic; shows firm understanding; language does not intrude on meaning; offers reasons; no serious flaws; no plagiarism; well referenced.
69% - 74% PASS	GOOD	Full; clear; insightful; logically structured; fully referenced; shows solid understanding; no plagiarism; well reasoned; evidence of additional reading; refers to authorities; strong language competence.
75% and over	EXCELLENT - IMMEDIATELY RECOGNISABLE AS WELL ABOVE THE AVERAGE	Outstanding coverage of relevant material; thorough/comprehensive; never strays from the topic; extremely well structured; correct genre; evidence of independent thought and reading beyond the course material; creative and original presentation; fully referenced; strong language competence.

Appendix 2: B Ed Honours (2004) tutor contract

This document constitutes an agreement between the School of Education, Training and Development, Pietermaritzburg and.......

1. Description of work to be done

As a tutor, you are required to:

- Attend an initial tutor training workshop (for which your subsistence and travel will be paid).
- Prepare thoroughly for this tutor training workshop. This includes:
  - Reading and understanding the contents of the Learning Guide/s (and any additional reading material given to you) at a depth that will allow you to engage actively in debates around key issues and concepts.
  - Completing any written tasks identified by a module co-ordinator as essential for the tutor training process.
- Prepare thoroughly for each contact session.
- Arrive at 08:45 punctually for all contact sessions and remain at the tutorial venue until 16:00.
- Get to know your students in your class in terms of their backgrounds, interests, experiences, expectations and academic weaknesses and strengths.
- Maintain a tutor file (which will be given out at tutor training) which reflects the nature and quality of your engagement with the module (through a series of reflections on different aspects of the module, and any other documents/ materials you and/or your module co-ordinator consider relevant).
- Maintain the following records in your tutor file:
  - Class register
  - Portfolio marks
  - Assignment submissions
  - Assignment results
- Ensure the confidentiality of the student data sheets in your file.
- Ensure that portfolio marks are with the local agents on the stipulated dates.
- Critically reflect on each contact session and complete an evaluation report to this effect. Guidelines will be provided.
- Mark Assignments One and Two and all portfolio tasks.
- Commit to any development processes deemed necessary by co-ordinators.

If you do not fulfil any of these tasks, the University reserves the right to terminate your contract at any time and with immediate effect.

2. Duration of the contract

The duration of the contract is six months only (February 2004 to July 2004) with no further expectations of employment.

3. Payment

You will be paid for completed tasks only. It is your responsibility to inform the University by Wednesday afternoon or Thursday morning if you will not be available for the contact session on Saturday. You will not be paid for that contact session.

Your remuneration for tutoring will be R4500 (before tax), which will be paid in four monthly payments at the end of March, April, May and June.

____

Tutor

____

B Ed Honours
Qualification Director

Case Ten: The establishment of a unit for distance education in a face-to-face institution: the University of Pretoria

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Editor's introduction

This case study of the establishment of a Unit for Distance Education in the Faculty of Education at the University of Pretoria (UP) raises a number of issues pertinent to traditional face-to-face institutions that wish to introduce large-scale distance education programmes. It focuses on **management and administration**, but raises issues pertinent to **policy and planning**, **learners**, **human resource strategy**, **collaboration**, and **information dissemination** as well.

Firstly, both the quality criteria and the minimum targets (see Section Two) underline the need for the deliberate establishment of institutional systems to manage the complexities of large-scale delivery. In this case study, there is careful consideration of which of the existing systems designed for contact tuition can be used/adapted, and which systems need to be specially designed to meet the needs of distance education. It should be noted that there are no hard and fast rules, and certain decisions made at the University of Pretoria are based on context-specific factors which might differ from those in other contexts. However, deliberate decisions have to be made - it cannot be assumed that existing systems in a face-to-face institution will automatically be suitable for distance education provision. The case study illustrates the following element of the **policy and planning** criterion very well:

> **1.5** Prior to offering programmes of study by distance education, the provider has explicitly designed systems for administering and teaching learners at a distance and has planned for contingencies in order to meet its stated aims in terms of academic quality and standards.

The second issue that the case study deals with effectively is staffing (**human resource strategy**) of distance provision in a face-to-face institution where staff do not characteristically have an expectation of distance education commitments. The case study discusses challenges for redefining and reallocating workload and providing sufficient staff development for new responsibilities. It also asks a difficult question: How much of an academic programme can be outsourced to other agencies/people and still be regarded as part of a university's offerings? Or, put in another way: What functions does the mother institution have to perform in order to be honest in claiming that the programme is theirs? The recent problematic history of public/private partnerships in South Africa makes it all the more urgent to answer this question responsibly - and the quality criteria provide a guideline.

> **10.8** In the case of public private partnerships, the public partner takes full academic and quality management responsibility, and ensures that learner rights are protected.

Finally, although the case study is primarily about how to manage distance education in a face-to-face institution, the point is made quite correctly that in education, it is the curriculum that should lead, rather than what is convenient from an administrative point of view. The case study therefore describes the academic model (how the teaching and learning is organized), and shows how the administrative model was built around the academic model.

What is not explored in the case study, however, is whether or not the academic model is the most desirable one. The academic model shows one particular solution to the distance education problem of how to balance the need for flexibility/openness with the need to provide structured support for learners. As will be seen in the case study, an inevitable result of allowing continuous registration is that, in each academic cycle, there is opportunity for only one contact session period. In the opinion of the editors, optimal flexibility (students can register when it suits them and there are two examination sessions per year) is achieved at the cost of more frequent opportunities for support. Although the quality criteria for programme development support the notion of openness:

> **3.15** To facilitate access, entry requirements for the programme are as open as possible.

this is balanced by an emphasis on learner support:

> **7.9** There are sufficient contact sessions to ensure that the learners are able to achieve the outcomes of the course.

For the target audience, successful achievement of the qualification is likely to be more important than being afforded the opportunity of registering at a range of different times in the year.

Introduction

The University of Pretoria started presenting distance education programmes in 1996 in partnership with National Private Colleges. In 2001 in the changing higher education environment, there were indications that the partnership with an external provider was not working satisfactorily. In 2002 the agreement was terminated and it was decided to phase out the students in the system over three years. All these students will be phased out by 2005.

A new phase in delivering distance education at the university began with the termination of the contract.

Research and planning

In 2001, the Executive of the University of Pretoria nominated a committee to investigate the potential for a distance education initiative in the Faculty of Education. The committee undertook wide-ranging research and developed a business plan with a ten-year prediction capability. The investigation found that:

- There was a need for in-service training of teachers in South Africa, and
- University of Pretoria had the necessary expertise and infrastructure to present the programmes in a cost-effective way that would conform to all the necessary quality requirements.

The committee also determined the minimum number of students needed in each of the programmes to achieve economies of scale.

Quality Criterion	1.4	The provider or programme management team can provide a rationale for the use of distance education or electronic learning methods for the delivery of the programme/course to the intended target learners.

The Faculty of Education wants to make a contribution to improving the quality of education in South Africa, and considers the use of distance education methods in the delivery of in-service teacher education a crucial way of doing this. It was decided that three programmes would be offered: two programmes leading to the Advanced Certificate in Education (one focusing on Education Management, and one on Learners with Special Educational Needs), and one programme leading to B Ed Honours. There were two reasons for selecting these programmes. The university had the capacity to develop the programmes and the investigation revealed a need in the market that made the numbers economically viable.

Quality Criterion	3.1	The programme is developed in terms of a needs analysis based on an audit of existing courses and programmes, market research, liaison (where appropriate) with industry and professions, national and regional priorities, and the needs of the learners.

The Executive approved the plan in March 2002 and the Unit for Distance Education was established in the Faculty of Education on 1 April 2002.

The first step was the development of a business plan, a ‘route map’ without which it would not have been possible to implement the initiative in a structured way. The business plan was and is the benchmark against which all development is tested.

Quality Criterion	3.8	Programme planning and budgeting are aligned, with potential income clearly identified, and appropriate levels of resource set aside for course design and development, for administrative systems and for supporting learners.

The business plan is not a detailed analysis of each business process, but provides the broad framework of activities and the estimated income and expenditure on, for example, developing study material, printing brochures, the structure and number of staff needed for student administration and the expenditure needed for capital items such as computers and telephones. A good business plan is particularly important in an academic institution, where it is often erroneously assumed that the academic component of programme development and delivery is the only expense. Particularly in large scale distance provision,

Quality Criterion	9.24	Proper budgetary processes are in place to ensure that the allocation of resources reflects the goals, values and principles of the educational provider.

there are numerous costs (such as, for example, cost of envelopes and postage/despatch) which can cripple an initiative if not taken into account.

Quality Criterion	9.27	Proper evaluation systems are in place to compare estimated goals and budgets with actual achievements.

As the Unit's work began, the business plan was used to determine whether all the necessary activities were being undertaken and what the possible costs could be. Necessary adjustments to the business plan to bring it into line with actual costs and structures will be referred to later.

Management system

Quality Criterion	1.5	Prior to offering programmes of study by distance education, the provider has explicitly designed systems for administering and teaching learners at a distance and has planned for contingencies in order to meet its stated aims in terms of academic quality and standards.

The necessity of developing or adapting systems that would be appropriate for large scale distance provision was a priority from the outset.

There was a specific decision that the Unit for Distance Education would not have an autonomous infrastructure, resources and processes, but would be integrated as far as possible with the existing infrastructure, systems and processes of the University. There were two reasons for this decision. First, it was a decision that made financial sense. Why should costs be incurred to develop additional systems if the existing ones could easily be adapted? Second, a signal would be sent out that distance education is not just a 'second-rate, secondary' initiative, but forms an integral part of the core business of the university. The case study will reveal that specific structures and systems had to be developed in view of the particular nature of distance education. However, this happened only after it was determined that the existing systems and structures did not serve the best interests of distance education. In adopting this approach, the University therefore confirmed its commitment to distance education.

The office of the distance education initiative consists of the manager, administrative officer, accountant and instructional designer. The Manager: Distance Education reports to the Dean of the Faculty of Education and acts as the 'conductor' of the initiative to ensure that all business processes operate in an integrated manner. For example, to get tutorial letters sent to students on time, the manager needs to ensure that:

- The post office knows ahead of time when there will be a bulk shipment;
- Printers are informed of when large quantities of printing need to be done;
- Academics know the due date for submission of print-ready tutorial letters.

The marketers in the field also need to be kept in the loop. They must, for example, know when final applications for a specific enrolment will be accepted and processed. The distance education manager is also specifically responsible for ensuring that delays and bottlenecks in the chain of activities are identified, that the impact on activities further down the chain is estimated, and that measures are put in place to manage the situation.

A matrix management system was put in place. This means that particular business processes for distance education were placed within another established structure. Staff involved fall under the line authority of that structure, while the Unit for Distance Education exercises functional authority over staff involved in each particular business process. An example of functional authority is that the manager of the printers can expect staff to print enough stock, do packaging timeously, and inform him if there are bottlenecks. However, he does not have the authority to tell staff at the printers exactly how they should organize the work and who must do it.

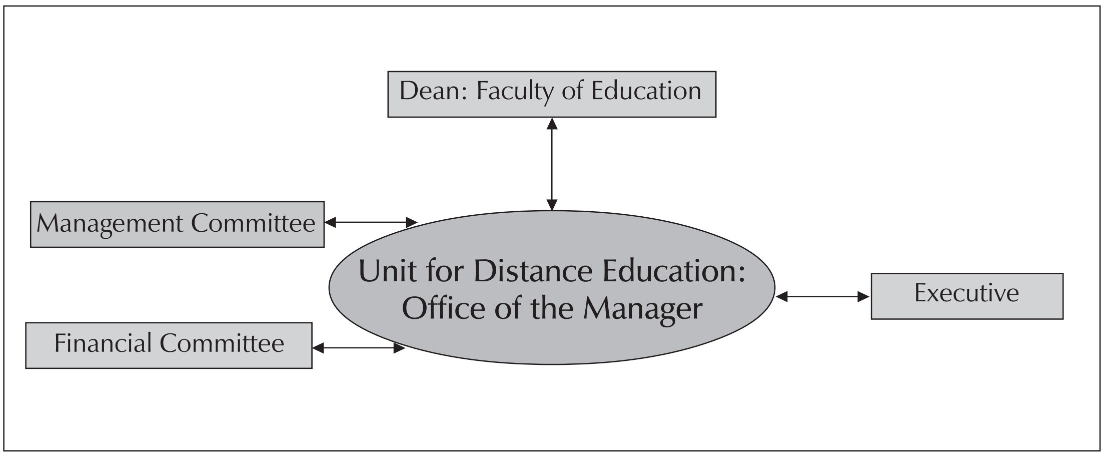
The Manager is supported by an Executive that meets weekly to provide support and advice in managing the initiative. The Executive consists of an expert from the Department of Telematic Learning and Educational Innovation, Academic co-ordinator, Co-ordinator for student administration, Accountant for the division, Instructional designer and Dean of the Faculty of Education.

There is also a Financial Committee consisting of the Manager, Accountant of the Unit, the member of the Executive of the University charged with distance education and the Director of finance. That senior managers of the University of Pretoria serve on the Financial Committee, indicates the high priority assigned to monitoring the financial management of the initiative. This Committee meets monthly to analyze the financial statements of the Unit and to discuss deviations.

The Executive Commitee of the university has also nominated a Management Committee for Distance Education that acts as a Board of Directors and meets twice per year. The Committee consists of all senior managers of entities that are linked to any activities involving the use of distance education. Extensive reports on the initiative are delivered at these meetings. This Committee meets under the chairmanship of the Dean of the Faculty of Education. The Committee acts as an advisory body and ensures that all the relevant senior managers of the University are informed of the initiative.

Quality Criterion	9.1	There are clear lines of accountability within the educational provider, between the educational provider and its governing structures, and between the governing structures and the community.

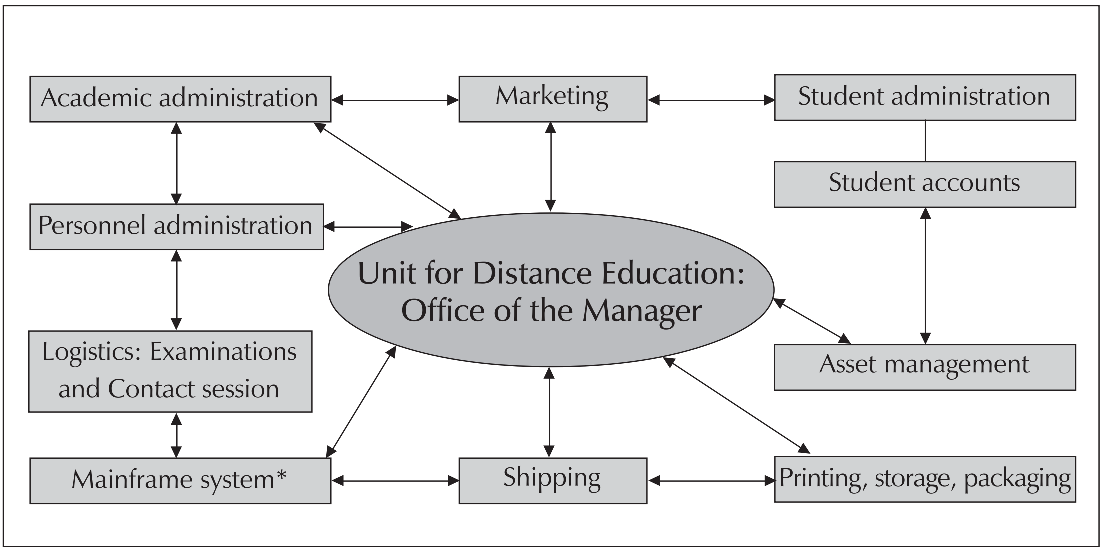
Figure 1: Management structure



Implementation

The very first step in establishing the Unit for Distance Education was to determine the academic model, to identify the business processes and to indicate where these processes were to take place. In the context of this case study, the academic model refers to the organizing framework within which the programmes will be presented. The model specifies such things as how the academic cycle will work, the place and role of assignments, role of contact sessions and when examinations will take place. In other words, it indicates how the academic programmes will be organized and managed. After the academic model had been established, an administrative model was built to support the academic model and not vice versa.

Figure 2: Administrative model



* Student Data Base System

The use of existing resources, structures and processes within the University was a primary objective. Where existing systems/processes were not usable, decisions had to be made either to adjust them or consider the purchase of a new system.

After all business processes had been identified, it was determined that it would be better to outsource some functions right from the start. It was decided, for economic and infrastructural reasons, that marketing and logistical management of examinations and contact sessions would be outsourced. It was more economical for the University to employ existing specialist service providers with appropriate infrastructure than to create the necessary infrastructure and employ the experts needed. However, the University specifically required providers to be able to conform to the quality criteria of the University. If this had not been possible, the University would not have followed that path and would itself have put the infrastructure in place.

Academic model

Motivation for academic model

The academic model was developed with three goals in mind:

- To improve access to studies and to give students the opportunity to adapt their studies to their personal circumstances;
- To provide support to adult students;
- To structure the study programme of students in such a way that the momentum of the academic cycles will facilitate the learning process to such an extent that students complete their studies in the minimum period of time.

The model makes it easy for students to register. However, at the same time, it allows for support to be provided to students through contact sessions held twice a year, but also through compulsory formative assignments and rules about numbers of modules that can be studied at any one time. It is designed to support students to complete their studies successfully in a minimum amount of time.

Description of model

Students can enrol at any time during the year. The date on which they enrol determines the academic cycle they follow. The academic programme runs in six month cycles:

- 1 October - 31 March, and
- 1 April - 30 September.

There are therefore two academic cycles that each contain the same core elements. The core elements of, for example, the April - October academic cycle are:

- 1 October - 31 March: Students enrol and receive their learning materials and Tutorial Letter No. 1 at the time of their enrolment.
- 31 March: Closing date for enrolment.
- April: Students receive Tutorial Letter No. 2 and Administrative Letter No. 1 specifically focusing on the July contact sessions.
- June: Due date for Assignment No 1.
- July: Three-day contact session in the school holidays.
- July: Closing date for the October examination registration.
- August: Due date for Assignment No. 2.
- August: Tutorial Letter No. 3 and Administrative Letter No. 2 focusing on the October examination.
- October: Examination.

Quality Criterion	9.8	Appropriate schedules are developed for all activities forming part of the distance education system, with due attention given to lead times needed to meet deadlines.

The modules for each programme are grouped in blocks. For the six modules in the ACE programme, there are two modules per block. For the twelve modules of the B Ed Honours programme, there are three modules per block. There are, therefore, three blocks for the ACE and four blocks for the B Ed Honours programme.

The academic model is constructed in such a way that students have to study in a disciplined manner.

- Firstly, a student receives only two opportunities to write the examinations for a single module. Thereafter he/she has to re-register for that module.
- Secondly, a student is also not allowed to register for an examination unless he/she has submitted the two compulsory assignments for the module. In addition, students are encouraged to put effort into the two assignments for the module because they count for 10% and 30% of the final mark respectively.
- Thirdly, the University sends out learning materials in blocks to help students organize their learning in such a manner that they study a manageable number of modules in each cycle. If they take on too many modules, the possibility of failure is increased.

Administrative implications of the academic model

All structures and systems at the University were developed for the normal contact academic year. The distance model differs in many respects, for example:

- A student can schedule his/her own study to a certain extent - deciding when to register for what modules for a particular examination session;
- Academic cycles do not fall within the normal academic year for the university;
- Calculation of the final mark for each module differs from the way in which marks are calculated for other university programmes.

This has implications for the administrative systems that need to support the programme. For example, the flexible model of delivery makes it more difficult to track student progress, necessitating the development of a more sophisticated student database system capable of statistical analysis to determine how well students are progressing (see section 6 below).

Initially, it was difficult to convince relevant staff that the distance education initiative is also a mainstream activity of the University. There was a general view that the academic model developed for the distance education programmes should be integrated into the existing systems and processes of the University. It took time to convince administrative staff that administration of distance education should be based upon the academic model rather than the other way around. Because many adjustments had to be made to existing work and administrative processes, there were often requests and temptations to follow the easy course and adjust the academic model to make the administrative work easier.

The implications of the academic model for administration are demonstrated by the complex processes for shipment of learning materials necessitated by the academic model.

At the start of their studies, students do not receive all learning materials for all the modules of a specific programme. Students receive their learning materials in blocks. A student receives learning materials for Block One immediately after registration. Students then receive learning materials for subsequent blocks after each examination session, regardless of whether they wrote the examination and irrespective of the examination result obtained for any module for which an examination was written. This is because students, after they have received their learning materials for a particular block, can decide not to take their examinations for the modules in that block at the earliest opportunity. Even if students fail a module they must still receive the latest tutorial letters for the relevant cycle. This means that the shipping system has to follow each student's progress through the programme to ensure that the right information is sent to the student at the right time.

Mainframe system adjustments (Student data base system)

Under-estimation of the extent and complexity of processes was one of the problems in the administrative environment. The problem was exacerbated by the complexity of the academic model. The most complex changes that had to be introduced were the adjustments to the mainframe student system. Many expensive lessons were learned in this and only after eighteen months could it be accepted that the mainframe system indeed catered for the complicated variables of each student's programme.

There had to be one database containing all information on a student as well as integrating different functions. A single data system is necessary in order to track what is going on at all levels, to ensure quality and to enable management of the total value chain.

Specifications in line with the academic model were compiled for the Department of Information Technology to programme into the mainframe student system. It proved to be one of the most intensive and complicated programmes yet developed for the University. An important lesson was the need for thorough testing of new programmes or adjustments before implementation. In spite of visits to other universities also offering distance learning, many mistakes were made. Much could be learned from one another, but the unique nature of each institution will ultimately determine the nature of, for example, structures and processes. Only now, after two years, is a fully integrated mainframe student system for distance education in place.

A number of programmes were developed specifically for distance education. These include:

- A mark system;
- An examination registration system;
- An assignment system;

- A contact session system;
- A dispatch system; and
- A system to extract statistics.

Quality Criterion	2.2	The management of information system provides for the tracking of student performance (for example, in assignments, examinations, or even attendance at contact sessions) and can be used to identify at risk learners and those learners who, though registered, are inactive. It can also be used to determine completion and throughput rates.

In developing the systems, it was imperative to ensure that the database could also be used to extract specific statistics for use as management information. In many cases it is impossible to ensure quality without using comparative statistics.

An example is that every module co-ordinator receives a complete comparative academic profile of his/her students which includes information on:

- Number of students that wrote the examination compared to the number of students registered for the module;
- How many failed;
- How many handed in assignments;
- What the average mark was for assignments;
- What the average mark for the examination was; and
- How many students attended the contact session.

Quality Criterion	2.4	Learner information is used to design programmes, courses, materials, learner support, and counselling services that are flexible and learner-centred.

The information is provided for the past three examination sessions. The information enables the co-ordinator to better prepare tutorial letters and to further improve presentations at contact sessions.

Student administration

A decision was taken to adjust the University's existing mainframe student system and integrate the distance education student administration systems with that of the Faculty of Education. In this system, some processes and structures were new, while others were adapted. The existing processes for handling applications and registration were retained.However, due to different billing structures the student accounting system had to be adjusted. Distance students, in contrast to contact students, do not pay extra for learning materials (study guides and textbooks), the examination fees are included in the overall study fee, they pay for the full programme at the start of their studies and not annually. They can, however, pay their study fees in instalments over twenty four months.

Quality Criterion	9.9	Enrolment practices include provision of accurate, helpful information to prospective learners, as well as efficient handling of money and registration information.

Printing, warehousing, packaging and dispatch

Functions such as printing, warehousing and dispatch can be undertaken internally or externally. In order to decide whether these functions should be outsourced or not, quotations were obtained from both the University printer and external printers. Considerations of price and administrative linkages led to a decision in favour of the University printer.

As student numbers grew, it became necessary for the University printer to make extensive adjustments. These were, among others:

- Developing an inventory system to exercise control over the warehouses;
- Finding large storage and packaging areas;
- Appointing additional staff and training existing staff in packaging procedures.

Work undertaken for distance education at present accounts for more than 20% of the University's printing and this is expected to increase.

The printing works undertakes two types of shipment: continuous shipment and bulk shipment. Continuous shipment entails shipment of new students' learning materials as they register. This type of shipment is the same for all students in the same programme, so that the same production line processes can be used in this type of packaging.

Bulk shipments of additional learning materials occur at least twice a year. In view of the personalized academic model, all these packages have to be individually made up which is very time and staff intensive. For example, in the bulk shipment of April 2004, more than 7000 individual packages were packed and shipped. Because mistakes can easily occur in the packaging process, it was necessary to develop control mechanisms to ensure that every package is correctly packed.

The shipment of learning materials is one of the most crucial steps in any distance learning programme. Should students not receive their learning materials, they cannot begin any academic activity.

The shipping system requires that students receive the correct learning material at the right time. As has been pointed out above, the flexible academic model adopted makes dispatch of materials one of the most complicated programming challenges.

The mainframe system had to be adjusted and a programme had to be written so that packages could be marked as 'packed' by means of a barcode reader. A system was developed at the University post office so that packages could be marked as 'shipped' by a barcode reader. This system now enables student administration to answer queries of students wanting to know when their packages were shipped, what was in them and the tracking number of the package. All packages are delivered by external courier to post offices. The agreement with the University stipulates that the package should reach the relevant post office within three days.

Quality Criterion	**9.10**	The production and delivery of course materials is fast, accurate, and reliable. Where existing systems prove inefficient, creative alternatives are found.

Management and development of processes

The number of registrations has grown very rapidly and within a year literally thousands of assignments, answer sheets, application forms and other items have been processed. Computerized programmes are now being used to increase efficiency. It was also necessary to continuously analyze the mass of activities undertaken by individuals. The concept of performing activities in the minimum of time and with the minimum effort while increasing output to the maximum has become important.

Quality Criterion	**9.12**	There are clear procedures to receive, record, process, and turn around assignments.

Existing staff have worked extremely hard at new and unfamiliar administrative tasks such as processing approximately 20 000 assignments twice a year. Furthermore, it was necessary to focus on working 'smarter', rather than merely 'harder'. A good system that cuts corners without cutting quality is essential in order to manage this kind of workload.

The role of staff in successful development and execution of particular processes is of the utmost importance. Staff attitude towards distance education was initially not very positive. Academic staff in particular did not accept distance education work as a part of the core business of the Faculty. There was a perception among some academic staff that distance education is of a lower academic level than contact education. There was also resistance to additional work required because initially the performance management system did not recognize the new responsibilities undertaken by staff.

It has taken about two years to establish distance education provision as a mainstream activity and to guide staff to regard it as such. It is now also accepted that the quality of the distance education programmes is at least as high as that of the contact programmes, evidence being that study guides developed for the distance learning programmes are now also used for the contact programmes.

Management of examinations and contact sessions

Quality Criterion	**10.5**	In the organization of consortia for programme development or delivery, structured contractual relationships are formed to protect the interests of all parties including the learners. Performance expectations are defined in contracts and agreements.

From the beginning, it was decided that there were experts in the external environment to support the University in the logistics of examinations and contact sessions. As with marketing (see below), a detailed contract containing all aspects, but especially expected outputs, was drawn up. The agency contracted is therefore bound to particular quality criteria. It was the University's view that the whole image of the university would be compromised if the integrity of the examinations could not be ensured.

Examinations

Two years after the introduction of the programmes, distance learning students are sitting for their examinations at more than a hundred examination centres. In April 2004, more than 12 000 examination papers were written.

During each examination period at least 10% of examination centres are visited by staff members of the university to ensure that invigilators adhere strictly to all instructions. To date, there has not been a single bottleneck at any examination centre that has led to students not being able to take the right examination at the right time and place. In the examination in April 2004, only fifteen (0.125%) cases of irregularities were reported.

Quality Criterion	**6.16**	Arrangements for locally-administered summative assessments are secure.

Contact sessions

Ten contact session centres have been established throughout South Africa, and logistics/administration, attendance of students as well as performance of presenters is monitored.

Quality Criterion	**9.11**	There are systems to organize decentralized support for remote learners - grouping of learners, allocation of tutors, location of suitable sites of learning.

Extensive administrative and logistical processes have been put in place to ensure that contact sessions run smoothly. For example, each presenter receives a full folder containing all information, both academic and administrative, pertaining to his/her module. An average of 65% of registered students attend these contact sessions - with more than 120 presenters involved. Three types of feedback on contact sessions are obtained - from students (communication, administration, venues and on quality of presenters), from presenters (on academic issues and concerns per module) and from group leaders (on administration, logistics, venue, team spirit, academic issues).

Quality Criterion	**11.8**	Staff, learners, and other clients are involved in the process of quality assurance and quality review.

Technology

Although the university uses technology extensively in the education of contact students, this cannot happen in the distance education field. At this stage, access to computers and the Internet is too limited. An analysis of the technology profile of our students revealed that only 8% of them had e-mail access, although 98% had mobile telephones. In view of this, all programmes are paper-based.

Quality Criterion	**4.4**	Choice of media and technology is justified in the light of the aims of the course, required learning outcomes, learner needs, capacity to access and use the technologies, the physical features of the teaching sites and available facilities and services.

Because students have good access to mobile telephones, this technology is used extensively, in particular to motivate students and to support administrative processes. In this process, we have learnt how precisely an SMS message must be sent in order to convey the maximum information. If the message is not precise, the receiver becomes confused and the university is inundated with enquiries.

The mainframe system has been adapted to enable students to receive an SMS message as soon as his/her first package of learning material is sent. The message informs the student that his/her package has been sent and contains the post office reference number. This was done to reduce the number of packages returned. In all other shipments, students are informed that a shipment has taken place and that they must enquire at the post office.

It has been found that students who are reminded through an SMS message that they have to register for a contact session, respond immediately and positively.

A pilot project has been put in place enabling 27 post-graduates in Botswana who have e-mail facilities to submit their assignments electronically. The assignments are marked using the 'track changes' feature and sent back to the students. The results of the project will determine how electronic submission of assignments will be handled in future.

Quality Criterion **9.5** There are effective systems for communication with current and potential learners, with key outside bodies, with governance structures, and with all staff and tutors involved in courses.

In spite of the fact that so few students have access to the Internet, it was decided that there should be a web presence. It was also decided that, for the present, a static site that will be a mirror image of everything the students receive in hard copy, will be developed so that students who want to glance through tutorial letters, administrative letters and important target dates will be able to do so online if they have access to the Internet. The site will also serve as an archive for lecturers who want to look at, for example, previous versions of tutorial letters.

Marketing

Because the programmes presented by the Faculty of Education through the use of distance methods are aimed at a specific niche market and there are marketing agencies that work in this market segment, one of these agencies was appointed on contract for a set period.

Quality Criterion **12.4** The provider's advertisements are truthful, objective and informative and meet the clients' needs.

An extensive contract that protects the integrity of the University in particular and the professional conduct of those associated with it, was signed. For example, marketers are expected to interact honourably with prospective students and to provide the correct information to students.

Quality Criterion **12.5** In the case of public private partnerships, public partners monitor the advertisements of private partners to ensure alignment.

The marketing agency is briefed in detail annually on the programmes and the agency is required to present a written report to the Executive twice a year. Marketing sessions are also visited in order to control the quality of the marketing communication. All marketing material is developed and provided by the Unit for Distance Education to ensure that the corporate image of the University is consistently projected.

Financial management

It would not have been possible to establish the Unit for Distance Education on a firm base if a comprehensive business plan containing expected income and expenditure for a projected period of ten years had not been developed beforehand. The projected income linked the expected number of students to class fees and took into account the future subsidy. Expected expenditure projected staff costs and capital and operating costs. Operating costs calculated in detail such costs as expected programme development costs, printing costs, shipment, student support, the cost of marking assignment and examination papers and marketing.

One of the greatest challenges was to reconcile the business plan with the real operating costs of the business. For example, the staff structure for administration had to be adjusted and the academic model ultimately decided upon had financial implications which could not be foreseen. For example, it was necessary to appoint a more senior financial management staff member than was foreseen in the business plan. After approximately two years the budget is in line with reality and financial projections can be performed more accurately.

One of the challenges of the programme was to reconcile the development of the academic model with the projected expenditure. Small decisions such as expecting one additional assignment per module can have a significant impact on staff expenditure and infrastructure. For example, if the decision is made to have one extra assignment, it means that, with current enrolments:

- 7000 more assignments per cycle have to be processed;
- Envelopes and postage expenses are vastly increased;
- Additional markers have to paid; and
- Additional help hired to assist with entering the marks.

This means that any adjustment has to be considered carefully because financial implications of such decisions could have drastic long-term consequences.

Quality Criterion	9.26	Budgeting procedures are in place to deal with the allocation of resources and monitoring of expenditure. The budgeting procedures are flexible enough to promote and enable constructive experimentation in design and delivery methods.

Asset management

This component of the programme includes three aspects, namely physical facilities, computer equipment, telephones and furniture. The staff model determined how these aspects were to be handled. For example, because there was a decision to house student administration of distance education in the Faculty of Education, existing faculty space had to be re-allocated, adjusted and expanded. This also had a direct impact on, for example, decisions relating to the purchase of fax machines and photocopying machines as there were already some of these machines in administration.

The type of staff model for academic appointments determined how many offices, computers and telephones were to be made available. Decisions had to be taken on the type of infrastructure to be made available for service providers. Because capital expenditure can consume a large part of a budget, purchases were handled particularly conservatively. A lot of effort was expended in making sure that what was envisaged in a particular process was well understood before finally making space available and purchasing equipment such as furniture and computers.

Personnel management

Academic staff

Quality Criterion		
	3.7	Human resource planning is an integral part of programme development.

To develop an academic personnel model specifically for distance education staff members was a complicated matter within a face-to-face institution.

Quality Criteria		
	8.10	Academic workload is measured in terms of the following: • course design • preparation of course materials • piloting of courses • devising and participating in assessment strategies • tutoring, particularly online tutoring • supervision of tutors/markers/other staff • management of courses • monitoring the success of the course • research and evaluation • contact hours with learners.

Firstly, existing staff members who are experts in many of the modules were not able to take on the full additional workload that the distance programmes required.

In the end a model was developed that provided for the appointment of additional lecturers and external service providers responsible for marking assignments and examination papers and presentation of contact sessions. The service providers are appointed in terms of a Service Agreement to perform specific tasks at a fixed tariff on request. These contractees are called service providers and not tutors because at the University of Pretoria, the concept of a tutor in contact programmes is not the same as in distance programmes.

Quality Criterion		
	8.13	Arrangements are in place for the proper recruitment, training, monitoring and payment of the necessary part-time and contract staff.

Quality Criterion		
	8.6	Staff are trained, monitored, and supported for the specialized roles and tasks they perform, including the design, management and delivery of electronically offered programmes.

Secondly, aside from workload issues, there were also problems of lack of capacity. Staff appointed to run face-to-face programmes may be experts in their fields, but that does not necessarily make them good writers of distance education material. Existing staff therefore had to be trained for this new task and, in some instances, external people brought in to help with the writing of learning material. In addition, an instructional designer was appointed to work closely with academics to ensure that all learning material conforms to the minimum quality criteria.

There are complex and contentious issues for which satisfactory solutions have not yet been found. These include:

- Should existing staff members employed for face-to-face provision receive additional remuneration for their involvement in distance education?
- Does the existing performance management/achievement evaluation system cater sufficiently for the unique nature of the distance education model?
- How much of the distance education work can permanent staff members outsource to service providers, without endangering the academic integrity of the programme?

With regard to the last point, it is important to ensure that external service providers are given clear contracts which specify responsibilities and standards of performance. In addition, they need to be properly trained for the tasks that they are required to perform.

Currently, each module has a module co-ordinator who is a permanent staff member with responsibility for selecting and training a module team of up to six members. These teams are presenters at contact sessions, and markers of assignments and examinations. The module co-ordinator is responsible for monitoring the work of module teams, based on feedback. It is the specific task of the academic co-ordinator to ensure that module co-ordinators take full responsibility for the protection of the academic integrity of their modules. The relevant departmental heads also play an important role in this.

Quality Criterion	**8.2**	The main responsibility for programme development, course design and monitoring of programme delivery is that of properly qualified academic staff.

Administrative staff

The staff structure did not develop in practice as it was foreseen in the business plan. A quality administrative support system was non-negotiable. Consequently, it became necessary to develop not only new staff structures, but also to institute new functions and processes for those structures.

In some cases specific additional staff had to be appointed to do certain tasks (for example, to help open envelopes before the closing date for handing in assignments), while in other cases the job descriptions of existing staff members were amended as needed. For example, staff at student accounts previously responsible for loan applications from face-to-face students, had to handle new processes for the loan applications of distance education students.

Quality Criterion	**8.5**	The educational provider employs sufficient administrative and technical staff to handle the specialized tasks of registry, despatch, management of assignments, administrative support, as well as technical IT support to learners and staff .

There was initially little understanding among administrative staff of the urgency with which some steps in the chain of activities had to be completed. Hard work has been needed over the past two years to establish a culture among all staff that the work they had to do was to be completed both within the time agreed upon and at the quality level required. Staff had to learn that non-achievement in one of the links in the chain of activities can have a significant impact on other links in the chain and that delays can negatively affect the student. For example:An administrative letter that is posted late can result in a student not receiving information on registration for an examination in time.

It continues to be a major challenge to encourage staff, both administrative and academic, to adhere to deadlines and to create an awareness that not meeting these deadlines can contribute to students' poor performance.

Quality Criterion	**9.8**	Appropriate schedules are developed for all activities forming part of the distance education system, with due attention given to lead times needed to meet deadlines.

Quality assurance

As programmes run in six-month cycles, it takes a long time to rectify or test certain activities. For example, if there is a logistical problem during the April examinations, a plan to correct the problem can only be tested in October. It will take a number of years to resolve all the logistical difficulties.

It has been necessary to establish instruments to measure the quality of every component of the chain of operation. A culture of self-evaluation has had to be developed in each staff member and output achievements have had to be improved. This is also a daunting task that is continually being addressed.

Mechanisms have been put in place to assure quality of academic programmes which include:

- Monitoring of contact sessions and examinations;
- Feedback from students, presenters, and group leaders on administrative as well as academic issues; and
- Use of external local and international experts as critical readers of the learning material.

There are also plans to amend learning material development and revision processes in order to enhance the quality of materials.

Conclusion

In this case study an overview of the challenges of establishing a distance education unit within a face-to-face university has been provided. It emphasizes that, without the support of the institution as a whole, and in particular of senior management, the initiative would be difficult to establish and maintain.

Secondly, the development of a business plan, and continual monitoring of activities against the business plan, are essential for the implementation of such an initiative.

Thirdly, among the biggest challenges in establishing the initiative have been to establish distance education as an integral mainstream activity of the University. Because the academics and administrative staff involved in the initiative initially saw distance education as a peripheral activity, the complexity and comprehensive nature of the attempt to establish the initiative were seriously underestimated. This led to the learning of expensive lessons.

Fourthly, clear decisions had to be made about which of the existing university systems could be used or adapted for distance education, and which were so particular to distance education that they had to be developed from scratch. The academic model has to drive the development of systems, rather than the other way round.

Finally, streamlining all the business processes is dependent on a very good student data system. For effective continuous quality monitoring, it is important to be able to extract detailed academic and administrative information from the system.

After two years, the systems are largely in place, but they need to be continually adjusted in the light of feedback and analysis of monitoring data. In particular, mechanisms need to be found to ensure that insights gained from critical reading of the learning material are implemented in revised versions of the material.

Case Eleven: The Leadership and Management for Change course at the University of KwaZulu-Natal: quality criteria and dialogic space

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Editor's introduction

In the first part of the case the authors reflect on the experience of developing and piloting the *Leadership and Management for Change* course with reference to a number of the quality criteria. These include **collaborative relationships**, **programme development**, **course design**, **course materials**, **learner support**, **assessment** and **quality assurance**. This experience has led them to suggest modifications to elements of some of the criteria. In the second part they introduce the concept of dialogic space in distance education and argue that, in relation to the NADEOSA Quality Criteria, this concept facilitates understanding of how certain of these criteria might be considered as working together. While aspects of a course such as course design, materials and assessment clearly overlap and are mutually constitutive, there is a danger that course evaluation by way of discrete quality criteria may promote an atomistic view of what is offered by a provider. The authors argue that the concept of dialogic space is productive for holistic understanding of the quality of a distance education course.

The authors of this case have used the invitation to write for this book to discuss how the criteria relate to their work - so the criteria are in the text, rather than in the margin.

The course

In 2003 the Centre for Adult Education at the University of KwaZulu-Natal, Pietermaritzburg piloted a course titled *Leadership and Management for Change*. The course was mixed-mode in format, including CD-ROM-based instruction, e-mail discussions and a face-to-face workshop. The learners were members of human rights organizations in southern Africa. The pilot proved to be a valuable learning experience for course facilitators, for whom this mode of delivery was new.

Collaborative relationships

Two organizations were involved in developing, managing and running the *Leadership and Management for Change* course. One was Fahamu, an NGO that supports progressive social change using information and communication technologies. Fahamu is dedicated to strengthening the capacity of not-for-profit organizations working on human rights issues in Africa. It produces electronic newsletters and distance learning materials, conducts research and runs CD-ROM-based courses. Fahamu is based in Oxford, U.K. and in Durban, South Africa. The Centre for Adult Education (CAE) at the University of KwaZulu-Natal, Pietermaritzburg, was commissioned by Fahamu to develop materials for a CD-ROM based leadership and management course, as well as to facilitate the course.

The Centre for Adult Education is part of the School of Education, Training and Development of the University of KwaZulu-Natal, and is based at the university's Pietermaritzburg campus. Founded in 1979, CAE has been involved since its inception in adult education work specifically aimed at empowering local communities. It is known for its experience in and knowledge of the theory and practice of adult and adult basic education.

This collaborative relationship meant that Fahamu's expertise in electronic media and distance education could be combined with the CAE's strengths in adult education, materials development and organizational development. The collaboration was not primarily conceived in the interests of cost-effectiveness but rather to develop, pilot and 'perfect' a particular course as a prelude to wider provision.

Collaboration always involves relations of power and possibilities of conflict as well as of synergy and complementarity. Difficulties within the partnership, common in distance and open learning partnerships, were in a sense compounded by the fact that this was a pilot and that the *Leadership and Management for Change* course is one of a suite. Biggs (cited in Robinson, 2002:111) presents four categories of research partnerships: contractual, consultative, collaborative and collegiate, each of which has a different configuration of decision-making and power relations. CAE's relationship with Fahamu was a contractual one according to which CAE was contracted to develop a course and implement a pilot of the course. As the project unfolded, the relationship shifted in some ways to a consultative one as CAE and Fahamu engaged around issues of course delivery.

To some extent, the relationship problems arose from a lack of clarity about roles. Thus the Centre saw itself from the inception as a partner, whilst Fahamu saw the Centre as a contracted service provider. This inevitably (and correctly) meant that managerial and administrative power lay in the hands of Fahamu; but such authority was sometimes in conflict with the facilitative role required of the Centre, and hence the educational objectives of the course from the perspective of the Centre. So administrative/ management decisions regarding, for example, the location and timing of the workshop, and the contracting of a co-facilitator, impacted on the quality of facilitation and the educational impact of the course. On reflection, there needed to be a much clearer synergy between administrative and educational objectives (John, 2003).

Quality criterion 10 states that:

> In the interests of cost-effective provision of education and training, collaborative relationships are formed and collaborative projects are undertaken wherever possible.

However, the focus on cost-effectiveness, while essential, is possibly too narrow since this is not the only rationale for collaboration in distance education. Collaboration has other benefits and pitfalls relating, for example, to the quality of the curriculum and the efficient administration of a distance education course. An alternative formulation of this criterion which would take into account the wider contexts and implications of collaboration might be:

> In the interests of cost-effective provision, efficiency of delivery and curricular quality, collaborative relationships are formed and collaborative projects are undertaken wherever possible.

Programme development

This section outlines the principles and processes of programme development by providing some background information on the origins of the Adilisha project, an initiative of Fahamu in association with the University of Oxford, and discussing the development of the programme in relation to quality criterion 3. The course is one of a suite of courses offered by Fahamu as part of its Adilisha project which seeks to strengthen the campaigning, advocacy and organizational capacity of human rights and advocacy organizations in southern Africa.

The programme as a whole, as will be seen, matches quality criterion 3:

> Programmes are flexible and designed with national needs as well as the needs of prospective learners and employers in mind; their form and structure encourage access and are responsive to changing environments; learning and assessment methods are appropriate to the purpose and outcomes of the programmes.

The development of the programme was informed by the developmental needs of human rights organizations and their staff. A number of surveys conducted in the1990s had identified a need among African NGOs for knowledge and skills related to human rights work, such as fact-finding, investigation and monitoring. However, they had also highlighted generic weaknesses common within the non-governmental sector, such as:

- many had poorly defined organizational goals and objectives;
- many lacked clearly defined strategic plans;
- some had undemocratic organizational structures, with, for example, gender imbalances at leadership level [Adilisha Project Summary www.fahamu.org/ad_projsum.html 01/09/18].

Fahamu's own research (Manji et al, 1998) suggested that few in the leadership of these organizations had undergone leadership training, or been trained in management or organizational development, and that a large proportion of these organizations had little experience in basic financial management skills, or of fundraising. In Fahamu's 1998 survey, training in management and organizational development was identified as a priority by virtually every human rights organization (Manji et al, 1998).

In addition to identifying these 'gaps' in knowledge and skills, Fahamu also identified a number of weaknesses in the typical training methodology of face-to-face workshops. One was that participants usually have a diverse range of experience and knowledge of the subject to be covered. Considerable time thus has to be spent at each workshop bringing all participants to a point of common understanding of basic concepts and principles before any further development can begin. In addition, workshops tend to be fairly costly, particularly when they involve participants who are widely dispersed (as is often the case, even within a single country). A further limitation is the lack of follow-up and support after the workshop. This context led Fahamu to believe that there was a real need for a different kind of training to be developed that would be appropriate to the actual work and context of the NGOs in both its content and its delivery.

Fahamu's approach combined the direct, face-to-face, human interaction of workshop-based learning with information and communications technology, in particular the growing access to and availability of electronic mail and the Internet. Fahamu's survey of the capacity of human rights organizations in eight southern African countries, conducted in 1998, demonstrated that more than 80% of organizations had one or more (Windows-based) computers, the majority of which had modem connections to a local Internet Service Provider. Virtually all had an e-mail address, and the majority used e-mail (www.fahamu.org.uk/rights/context). The mixed mode approach thus provided an opportunity for delivering training in the region and for overcoming some of the limitations of workshop-based training. IT-based training would allow learners to:

- Work at their own pace;
- Access documentation and resources from around the world with relative ease;
- Use practical examples from their own work situation;
- Obtain inputs from a wider range of international expertise than would otherwise be feasible in a conventional course; and
- Receive 'mentoring' support while dealing with day-to-day challenges at work (www.fahamu.org.uk/rights/context).

The Adilisha courses are thus distance-learning courses that involve using CD-ROM-based interactive materials facilitated by e-mail over a period of about eight weeks, combined with regional four-day face-to-face workshops and subsequent supervised projects in which learners have an opportunity to apply their new skills. By providing learners with learning materials in interactive format on CD-ROMs they would be able to develop their understanding of the subject to a sufficient depth to get the very best out of the workshop that they attended as part of this course. Once learners were enrolled, they would be linked via an electronic mailing list to all others participating in the course. They would also be linked to the course tutor who would guide them through the learning, assess their assignments, and give them feedback on any queries they might have (www.fahamu.org.uk/rights/adprojsum1.html).

Given the levels of connectivity among African NGOs and the expense of workshop-based training, one could argue that the form and structure of the Adilisha courses 'encourage access and are responsive to changing environments' (quality criterion 3).

Learning and assessment methods, which are considered more fully under **Learner support** below, are designed to encourage interaction among course participants and application to real contexts. The remainder of this case study focuses specifically on the *Leadership and Management Course for Change* developed by CAE.

Course design

This section discusses the content and process of course design, and relates them to aspects of quality criterion 4:

> The course curriculum is well-researched, with aims and learning outcomes appropriate to the level of study; content, teaching and learning and assessment methods facilitate the achievement of the aims and learning outcomes; there is an identified process of development and evaluation of courses.

The course is a comprehensive guide to leadership and management within non-governmental organizations. Modules include: *Introduction dealing with definitions of leadership, management and governance*; *Understanding your context*; *Understanding your purpose*; *Planning and evaluating performance*; *Managing people*; *Organization*, *structures and systems*; *Managing resources*; *Managing relationships*; and *Managing yourself*. The course curriculum was 'well-researched with aims and learning outcomes appropriate to the level of study' in the sense that:

- it addressed the identified organizational development needs of human rights activists in the region;
- at a theoretical level, it was grounded in Open Systems Theory, which sees organizations as part of a bigger system, and thus both affected by, and affecting, the context within which they work.

Fahamu used rigorous quality control measures during the development phase. Each course was put out to tender on a variety of websites and e-newsletters. Applicants were required to submit a detailed proposal, outlining their approach to the material as well as their experience in the content. Successful applicants signed a contract with Fahamu which tied payment to satisfactory completion of various products. The first of these was a detailed outline of the course, including content (structured into modules and units), activities for each unit, and outcomes for each unit. After submission by the developers this was scrutinized by Fahamu and 'content expert' advisers, and detailed comment provided (it should be noted that in a number of cases, developers were at this point paid off, and the development of the course again put out to tender). If Fahamu felt that the outline was satisfactory, the next stage of development began. This was a complete first draft of the CD-ROM component of the course, including all activities, assignments, etc. The draft was reviewed by two external reviewers, as well as Fahamu, and again detailed comment was provided. Once again, if this draft was felt to be unsatisfactory, the developer/s were paid off, and new developers sought. Regional workshops were also held for all the developers of each course, to discuss and agree on course design issues and comment on various drafts of each course. A final draft was then submitted. This was then placed on a CD-ROM, using Macromedia. There was thus a very thorough and rigorous 'identified process of development and evaluation of courses' (quality criterion 4), and it is clear that:

> **4.14** The education provider requires relevant competence of authors, consultants and others that are brought into the course design and development process.

Course Materials

In developing the materials, it was critical for us that, as quality criterion 5 states:

> The content, assessment, and teaching and learning approaches in the course materials support the aims and learning outcomes; the materials are accessibly presented; they teach in a coherent way that engages the learners; there is an identified process of development and evaluation of course materials.

This section describes certain aspects of the materials and links them to these requirements. The CD-ROM formed the core of the course materials, although learners also received a file containing additional information about Fahamu, Adilisha, and support materials to help them in working through the CD-ROM. Learners were also sent a copy of Ngugi wa Thiongo's *Petals of Blood*, which was required reading in preparation for the workshop.

It was recognized from the start that the CD-ROM would ultimately serve a dual purpose - that of training material, and of reference material. However, it remained crucial that learners (and potential learners) did not see the CD-ROM as sufficient in and of itself. The CD-ROM material as it stands was developed so that it largely met the outcomes identified in the original course outline. In other words, by working through the course and completing all of the activities, a learner should have achieved **all** of the outcomes to a considerable extent. However, the workshop remained critical in ensuring that those outcomes which relate to complex reflexive thinking (for example, strategic thinking and planning) and inter-personal skills were further developed to the level required.

Since many of the participants would be using English as an additional language, the materials were developed at a level that would allow someone with some secondary schooling to be able to cope - although in fact during the piloting of the course most of the learners had a considerably higher level of education than this. While an attempt was made to ensure that although the materials were of a very high quality academically, the style of language was relatively informal:

> **5.5.5** The language level of the materials is appropriate for the target learners and the materials assist learners with the particular difficulties that learning- through-reading and learning at a distance require.

Regarding structure, the materials consist of sequential sections and units, which scaffold learning by helping learners build on prior knowledge as they work through the course. Each unit contains activities which learners were expected to complete, some of them requiring written work, some of them requiring on-line completion (for example, matching exercises), and some of them requiring the submission of assignments. Formative assessment was, therefore, carefully woven into the materials, providing opportunities for self- and tutor-assessment, while the e-mail discussions and face-to-face workshop brought in a dimension of peer assessment:

> **5.5.7** Active learning and teaching approaches are used to engage learners intellectually and practically, and cater for individual needs.

The course is divided into a series of sections, divided in turn into modules, which are then further divided into units. The sections conform to the five things identified in the introduction to the course as being critical to good leadership and management of NGOs - context, activities/work done, structure and systems, resources, and relationships, with an introductory section and a concluding section which focuses on self-management. The course offers a carefully developed argument about how and why leadership and management within organizations working for change needs to be premised on certain fundamental principles, so that as they work through it, learners understand why, for example, particular structures or management systems are more appropriate than others. In the course:

> **5.5.8** Content is presented in the form of an unfolding argument, rather than discrete bits of information that have no obvious connection.

The course also scaffolds knowledge, and learners are asked to work through it chronologically at least initially, since they will otherwise not have the necessary prior knowledge of critical concepts to engage fully with the material. On the CD-ROM, learners can access a full course outline at any time, and are also shown on screen exactly where they are within a specific unit at any one time.

Each section, module and unit begins with an introductory section, which broadly follows a Situation, Problem, Question, Response (SPQR) format (what is the present situation, from the point of view of the reader, derived from the reader's own likely experiences; what is the problem inherent in the present situation, as seen by the reader; what are the questions posed by the problem as identified; how will this course deal with these problems and how will that be done). The first screen of each module uses talking heads which state a particular problem commonly experienced by NGOs. The use of the SPQR format and the talking heads is intended to help learners identify more closely with the material, to see its relevance to them, and to indicate the kind of things that will be covered in that module. The course designers have addressed the requirement of quality criterion 5 that the materials 'teach in a coherent way that engages the learners'.

In the pilot programme, ensuring that there were activities appropriate to the level of the course, and which helped the learners engage with the content whilst furthering their understanding of it, was clearly of critical importance. We used a range of different kinds of activities, some of which were interactive, but many of which were not. The use of activities which did not make use of the interactive possibilities of the medium was deliberate, since this allowed learners to print these out and do these activities at home/off-line.

A number of the activities related to the two case studies which were used throughout the CD-ROM component of the course. Stories and examples relevant to the learners contexts were also used extensively (See Figure 1 below). The case studies involved two (fictitious) organizations, and were constructed for use in a variety of ways, such as exploration of different kinds of organizational structures; investigation of organizational history and its impact on the organization; contextual analysis. This allowed learners to see the inter-relatedness of the issues covered in the course, something which was felt to be critical for a true understanding of leadership and management. It allowed learners to see how history and context (covered at the beginning of the course) related to, and impacted on, staff management, organizational systems and policy, etc. covered much later in the course. Learners were thus required to move backwards and forwards across course content to make these links. The relevance of the materials to learners' contexts, together with the ease of navigation of the CD-ROM, address the requirement that the materials be 'accessibly presented' (quality criterion 5).

Figure 1: Example of story used in L*eadership and Management for Change* course materials

Read the following story. Whilst you read, make notes about the things in the personal lives of the people the stories are about that affect their work:
Bongani works as a fieldworker for Children's Partnership, an organization working with child prostitutes in Zambia. Bongani discovered nearly four years ago that he was HIV positive. At first he did not want to tell anyone at work, but he finally decided that since he encouraged others to live positively, he should do likewise, and he told everyone at work. His colleagues and the Executive Director of the organization have been very supportive, and Bongani feels very good about having told them. He has stayed well, and has been as productive as ever. However, this winter he developed bad flu, and since then has been constantly sick.

The use of CD-ROM obviously allowed a level of interactivity which is simply not possible in paper-based materials. We had never worked with the medium before and found it difficult to make the conceptual leap required. As a result, whilst we were able to make use of interactivity in a number of activities (as in the examples mentioned above, and also included a video clip of a very bad meeting which we used in a series of activities to explore meeting skills) it is likely that we have not yet fully exploited the potential of the new medium.

Learner support

Providing learner support on the course proved to be a considerable challenge and a steep learning curve. Learners initially received and worked through course materials on CD-ROM, supplemented by e-mail discussions. Facilitators held e-mail discussions by setting a topic related to the materials each week and posing a number of questions related to it on a tutor list, to which all learners had access. Learners posted their views and were able to engage with the topic and each other's positions. Once they had completed the course and submitted two assignments, they met with their facilitators in a four-day face-to-face workshop to consolidate learning. Thus, in terms of quality criterion 7, the course provided a range of opportunities for two-way and inter-group communication, both remote and face-to-face:

> Learners are provided with a range of opportunities for real two-way communication through the use of various forms of technology for tutoring at a distance, contact tutoring, assignment tutoring, mentoring where appropriate, counselling (both remote and face-to- face) and the stimulation of peer support structures. The need of learners for physical facilities and study resources and participation in decision-making is also taken into account.

The e-mail discussion played an important role in stimulating peer support as learners were able to share their organizational experiences and dilemmas, and receive feedback and advice from one another. Four learners from Zimbabwe, for example, were able to get to know and support each other via e-mail within a difficult socio-political context and to establish enduring relations which lasted beyond the course. The e-mail forum was crucial to establishing a virtual community of learning.

One of the learnings that emerged from the e-mail facilitation was the need to structure the discussion with weekly topics and questions, linked to learners' progression through the materials. This signaled to learners where they should be in the course and provided them with a virtual opening to test and refine their ideas. The topics were not simply a recap of course content but an attempt to link course content with learners' experiences and perceptions. One topic, for example, was: 'Is there such a thing as an African style of leadership?' Learners drew on models of leadership in the materials as well as on their own organizational experiences within an African context. The e-mail discussions thus helped to create a dialogue, not only between learners and tutors and among learners themselves, but also between the course content and the learners' contexts. This links to the idea of the course as a *dialogic space*, which we develop further below.

The face-to-face workshop was perhaps the highlight of the course. First of all, it enabled course participants to put a face to the e-mail persona that they had encountered virtually. It also gave facilitators an opportunity to address specific areas of weakness that they had identified in the assignments. For example, most learners struggled with the task of developing a force-field analysis of their organizations in their first assignment. By working on this task together at the workshop, they were able to master the technique. Another benefit of the workshop was that learners were able to share their own organizational experiences and human rights contexts with each other.

Techniques which worked especially well at the workshop were simulation and role play. These involved learners setting up an organization in response to a particular context, generated from the Kenyan novelist Ngugi wa Thiongo's *Petals of Blood*; writing a proposal to and receiving feedback from a funder (Mr Axe of Viking Aid, role-played by one of the facilitators); and dealing with a number of 'curve balls' as an organization. One example is provided below:

> Your director has taken a decision that, given the tight funding environment, no more over-time will be paid. You are all under enormous pressure to complete a project according to contractual deadlines, and are having to work considerable overtime. What do you do?

Learners role played these scenarios, taking on different roles in each case (Director, Secretary, Field Worker, Chair of the Board) with some sitting out as observers. They then came out of role into a debriefing session which analyzed what had happened and linked it to course themes. Feedback from learners indicated they appreciated role play and simulation as ways of linking course content to organizational situations. As the workshop evaluation report states: 'The integration of the CD-ROM content into different practical simulations provided deeper insights into leadership and management.'

In our reflections on learner support, we identified a number of moves that constituted the facilitation role within the e-mail forum. These are consistent with Holmberg's concept of 'guided didactic conversation' (Holmberg, 1983). These included:

- Adding their own views as facilitators;
- Attempting to extend the discussion (by deepening, broadening, and/or personalising);
- Redirecting as necessary;
- Encouraging more students to participate in the debate; and
- Summarizing the discussion that had taken place that week.

One of these moves is exemplified in the e-mail note displayed below:

Figure 2: Example of e-mail note from course facilitators to learners

Deepening and broadening the debate
Dear B
Thanks for the comments.
The rest of you are being very quiet! What do you think? Are African leaders more inclined or less inclined to be corrupted/corrupt than leaders in other parts of the world?
And is it possible for leadership in NGOs to be based on everybody, rather than somebody? Do you have any ideas about how this could work?
What's your own experience of leadership in NGOs?
Anne, Peter, Vaughn

Besides the e-mail facilitation of group discussions and the face-to-face workshop, learner support also occurred through assignment tutoring. This will be further elaborated in the section below.

Assessment

The course was based on the assumption in quality criterion 6 that:

> Assessment is an essential feature of the teaching and learning process.

Assessment took the form of two formative assignments while learners were working through the materials and a summative project which they completed after the workshop. The workshop itself served the purpose of assessing whether learners had come to terms with the course and its application to their contexts. The following element of the quality criterion on assessment is relevant:

> **6.4** There is a range of formative and summative assessment tasks and methods which ensure that all learning outcomes are validly assessed.

The assignments were designed to assist learners in engaging with the course materials, on the one hand, and in relating these to their own organizational contexts and experiences, on the other. The first assignment required that learners analyze the contexts of their organizations using analytical tools (such as SWOT [1]), stakeholder analysis and force-field analysis, which they encountered in the course materials. In the second assignment they had to analyze their organizations themselves, focusing on aspects such as vision and mission, objectives, structures and programmes. The project activity, which they completed after the workshop, gave them two options. Either they could develop a strategic planning process for their organizations or they could plan a strategic review.

The assessment process was an important part of course learning since it entailed formative feedback on drafts and the opportunity for learners to revise and resubmit either their assignment as a whole or specified parts thereof. Learners and their facilitators thus engaged in a dialogue around their assignments and, through their assignments, their organizational contexts and programmes.

As a form of assessment, the quality of the learners' participation at the workshop indicated that they had a thorough grasp of the course materials and were able to relate them to their organizational contexts.

Quality assurance

Quality assurance was built into the process of programme development, course design and course delivery in a number of different ways. It was particularly important since the course was delivered as a pilot with a view to evaluating its effectiveness and revising it where necessary. This is consistent with quality criterion 11 which indicates that:

> There is an integrated framework at a policy and practice level that informs a clear cycle of planning, implementing, monitoring, reflection and action to ensure that learners' and staff needs as well as the needs of other clients are met.

As indicated above, the conceptualization of the programme was based on research undertaken by Fahamu on the needs of non-profit organizations engaged in the human rights field. Fahamu's quality assurance of the materials has been explained above. During the implementation of the course, the CAE facilitators held regular monitoring meetings to assess the progress of the course and the performance of learners, and liaised with Fahamu around emerging problems. This resulted in the revision of aspects of course delivery, such as the consolidation of e-mail discussion around set topics and the presentation to learners of a time-frame for working through materials.

Fahamu employed external evaluators to conduct a summative evaluation of the course materials and structure, the difference the course made to individuals and the wider gains. The evaluators assessed the materials, monitored the e-mail activity during the course and attended part of the face-to-face workshop. An additional part of the summative evaluation was a workshop attended by participants on all the Adilisha suite of courses, including the *Leadership and Management for Change* course, to provide feedback on the courses and make recommendations for their improvement. Their evaluation report, together with CAE's final report and recommendations, provided a sound basis for the further development of the course. In summary, the evaluators found that the materials were 'genuinely innovative in the field they seek to serve' and that the

CD-ROM format was 'of a very high quality and generally found to be user-friendly'; the structure of the course - eight weeks of individual study followed by an intensive face-to-face workshop and then an eight week supervised project - 'generally worked very well'; tutorial support, both in mentoring and supervision, was of a very high standard; the word 'empowerment' described learners' responses to the course in regard to personal learning and organizational applications; and the course had produced benefits in terms of professional networking. The evaluation stated that it was too early to assess the impact of courses on organizations, but recommended that organizations look at several members doing the course together to maximize impact (Allsop and Odayan, 2003:13-14).

The course as dialogic space

In this section we briefly discuss the notions of dialogue and dialogic space, and then relate them to the *Leadership and Management for Change* pilot course. In relation to the Quality Criteria, the notion of dialogic space provides an understanding of how certain of these criteria might be understood as working together. While aspects of a course such as course design, materials and assessment, for example, clearly overlap and are mutually constitutive, there is a danger that discrete quality criteria might promote an atomistic view. The concept of dialogic space can play a role in understanding the quality of a distance education course holistically.

Dialogue has a rich and polyvalent resonance within the western philosophical tradition as well as in emancipatory discourses of the South (See for example Bakhtin, 1981; Buber, 1964; Freire, 1970; Gadotti, 1996; Habermas, 1972). Paulo Freire, in the setting of mid- and late-twentieth century Latin America, develops the notion of dialogue in relation to education, in particular to adult literacy. For Freire, dialogue is not merely an educational technique; it is something fundamental to the process of becoming a human being. He sees it as an act of communication in relationship that shapes one's orientation to others and the world: 'Dialogue is a moment where humans meet to reflect on their reality as they make and remake it' (Freire and Shor, 1987:98). Freire emphasises the relation between dialogue and political action; dialogue is not simply talking for its own sake. It is part of a praxis of transforming the world: 'Through dialogue, reflecting together on what we know and don't know, we can then act critically to transform reality' (Freire and Shor, 1987:99). Thus Freire links dialogue, and the changed consciousness that arises from it, to an explicit political agenda of liberation from oppression.

In the literature on distance education, the notion of dialogue resonates with Keegan's inclusion of two-way communication between teacher and learner as a definitive component of distance education: 'the student may benefit from or even initiate dialogue' (Keegan, 1990:44); and with Holmberg's notion of 'guided didactic conversation' which is 'simulated through the students' interaction with the pre-produced courses and real through the written and/or telephone interaction with their tutors and counsellors' (Holmberg, 1988:115). Perraton (1988), in working towards a theory for distance education, identifies three levels of dialogue: on paper (similar to Holmberg's simulated conversation of the student's elaboration of the text); face-to-face sessions between tutor and student (Holmberg's 'real' or 'direct' conversation); and group discussion. He also gestures towards another level of dialogue: that between the distance education course and the learner's context of knowledge and experience:

> Learning is more effective if, through dialogue between student and teacher, the student can be shown how the new matter he is learning relates to what he already knows, relates to his environment. (Perraton, 1988:35)

We characterize emancipatory adult education projects and programmes as *dialogic spaces* - particular social and educational sites which enable dialogue - because they feature dialogue at a number of related levels: between project participants such as teachers and learners and within their conventional roles (Freire's terms 'teacher-learner' and 'learner-teachers' are applicable here); within project participants as they engage in self-reflection, both at the time of their involvement and subsequently; between the projects and other sectors of society, such as the workplace and the community; between discourses within the project such as academic disciplines, critical thinking and the discourse of political struggle. The projects might also be characterized as microcosmic instances of dialogue between the past and the future regarding the nature of society.

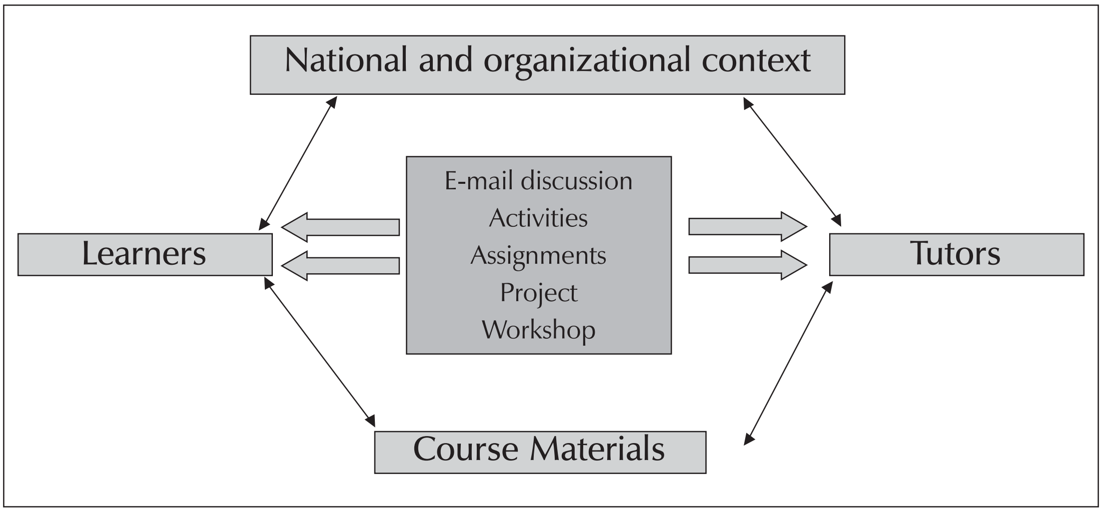
The notion of space in a distance education course is obviously different from that which would apply to an exclusively face-to-face learning format. In distance education space might be the actual physical space of an occasional meeting of facilitator and learners, or the virtual space of an e-mail discussion, or the individual zone of learning in which the learner engages with course materials and writes assignments. In distance education, the notion of dialogic space might be understood as the composite and complex learning space constituted by virtual, face-to-face and intrapersonal aspects.

The *Leadership and Management for Change* course was a dialogic space in the sense that it created a dialogue among and within learners and facilitators around issues of organizational transformation. Course participants related themes and issues in the materials to their own organizational contexts. They did this through e-mail discussions, assignments, face-to-face interactions at the workshop, and a summative project. The role of the facilitators was to facilitate this dialogue by posing topics and questions via e-mail, responding to learners' comments by deepening and extending discussion, providing formative feedback to learners' assignments, and engaging with learners and their organizational contexts at the workshop. In this process, the facilitators were also learners as they came to know the learners' organizations, concerns and contexts, and learned from the learners' experiences and insights.

A course in itself, as a set of materials, a regime of assignments, a format of discussions, is not necessarily dialogical. Materials, assignments and formats can be more or less amenable to dialogue, but even the most progressive, learner-centred, contextualized materials can be taught in a monological way. Dialogue arises in the process of engagement as course participants relate the course content and processes to their own contexts. In this regard, facilitation, both within and around the course materials, is crucial.

The diagram below and the brief summary that follows attempt to capture this understanding of the *Leadership and Management for Change* course as a dialogic space. The arrows represent dialogue between and among various course components. The peripheral boxes represent the participants, content and contexts involved in dialogue. The central box represents the processes that facilitate dialogue.

Figure 3: The *Leadership and Management for Change* course as a dialogic space



- Tutors and learners develop a community of learning, initially a virtual community which later becomes 'real' at the workshop where they meet face-to-face.
- Dialogue occurs as learners engage with course materials, facilitators and fellow learners, and relate the course content to their organizational contexts.
- The tutors facilitate this dialogue through e-mail discussions, assignments, projects and the face-to-face workshop.
- Through this the course develops as a *dialogic space* in which learners can explore issues of organizational transformation.

Conclusion

A number of issues concerning quality criteria arose from the piloting of the *Leadership and Management for Change* course. First, the ratio of tutors to learners was high: three tutors for thirteen learners. Learners thus received very thorough and punctual responses to their assignments and e-mail comments. One consultant connected to the course called it 'the Rolls Royce model of distance education' and it would not have met requirements for cost-effectiveness. The favourable ratio could be justified on the grounds that this was a pilot version and there was a need to build capacity among tutors to roll out the course on a wider scale. One tutor could easily facilitate e-mail discussions, mark assignments and run a workshop for a group of about 15 learners on the course but if the number of learners doubled there would be a problem in providing high quality learner support.

A second issue concerns the limitations of support, even within a very well-resourced course, where the aim is to effect change beyond the course and its participants. The course aimed to equip learners to effect positive changes in their organizations. However, learner support, in the form of virtual and face-to-face facilitation, feedback on assignments, and so on, helped learners to work through the course rather than to change their organizations. Besides participation in such a course, other factors which influence the possibility of transformation are the receptiveness of the organization to change, the leadership style, the socio-economic context, the confidence and competence of the change agent, and the presence or absence of post-course support for participants. By linking content concretely to context within a dialogic space, the course gestured towards organizational transformation rather than effecting it, and this is all that it could do. What happens after the course is up to the participants and their organizations - a sobering realization for those in the 'Education can change the world' school. Thus quality criteria for distance education do not necessarily guarantee a positive impact on education or society beyond the course, since there are other external factors at play there.

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Endnote

[1] SWOT refers to a way of analyzing practice in terms of Strengths, Weaknesses, Opportunities, and Threats.

Case Twelve: Self-evaluation in the e-learning unit at the University of Pretoria

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> 'Meaningful change is brought about by individuals taking action to change their own situations, and making their practice more relevant to those they are serving.' (McNiff, 1996, p.xv)

Editor's introduction

This case study describes the processes and instruments used to elicit feedback from lecturers and students on the services and products of the e-learning unit at the University of Pretoria. It shows a particular 'evaluation technique' that can be used to enable 'learners, and other clients' to contribute to quality review, and therefore illustrates the quality criteria for **quality assurance:**

11.5 The provider engages in benchmarking and uses appropriate monitoring and evaluation techniques to gather and analyze data to use as a basis for setting priorities and planning for quality improvement.

11.8 Staff, learners, and other clients are involved in the process of quality assurance and quality review.

However, the case study also illustrates neatly (mainly in the kinds of questions that are asked in the student and lecturer feedback questionnaires in the attached appendices) the relevance of criteria that refer to the conditions necessary for successful use of e-learning - criteria relating to **human resource strategy**, **learner support**, and **management and administration**.

Staff development for design and delivery of e-learning:

8.6 Staff are trained, monitored, and supported for the specialized roles and tasks they perform, including the design, management and delivery of electronically offered programmes.

Student access to relevant technology:

7.17 Learners have access to the facilities (for example, libraries) and equipment that are necessary for their successful learning.

Orientation to and ongoing learner support for students involved in e-learning:

7.3 Learners are carefully oriented to the teaching and learning methods on the programme, particularly if electronic learning methods are used.

Development of learners' computer skills:

7.4 Where appropriate, the development of competence in the use of information and communication technologies is built into the learning outcomes of the programme.

Technical assistance:

7.18 Learners are provided with technical support for each educational technology hardware, software, and delivery system required in a programme.

Training in the use of the technology for both staff and students:

9.23 Staff and learners are trained in the use of the equipment, facilities, and communication and information systems.

Reliability of delivery using the selected technology:

9.20 In the case of electronically offered programmes, the provider ensures the reliability and predictability of a 'fit-for-purpose' teaching and learning delivery platform.

What is also critical is the importance of ascertaining the nature of the contribution that e-learning can make to the teaching and learning experience. E-learning does not automatically improve teaching and learning - there needs to be continual reflection on whether or not it does. The lecturer experience and satisfaction survey asks a number of questions that assist lecturers to reflect on whether or not e-learning 'adds value' to the learning experience.

Introduction

This case study describes part of a self-evaluation exercise carried out by the e-learning unit of the Department of Telematic Learning and Education Innovation (TLEI) at the University of Pretoria (UP), from 2001 onwards. The results reported here are part of a comprehensive effort to design and implement a formal quality management system for e-learning, back-grounded by an ISO 9000 approach to quality assurance (see Fresen, 2004). The goal of the self-evaluation exercise is to encourage reflective practice by academic and support staff so that the action-reflection cycle becomes habitual in every role player, in order to promote continuous quality improvement.

Background to the e-learning unit

Education innovation is a key strategic initiative at the University (University of Pretoria, 2002). TLEI is a service department which assists and supports academic staff in education innovation and the enhancement of quality in the design delivery and support of teaching and learning activities.

The term 'distance education' is sometimes used synonymously with 'online learning', in the sense of 'technology-assisted distance learning'. The preferred term in this case study is 'web-supported learning'(WSL), which implies that the Internet is used as a supportive delivery medium to enhance and support the teaching and learning process. Web-supported learning is used in this case in a face-to-face context, rather than for distance education, in which the learner is separated from the provider in space and time. The University of Pretoria promotes a model of flexible, blended learning, which encompasses a range of electronic and face-to-face delivery mechanisms and support systems, using appropriate, cost-effective combinations of information and communication technologies (ICTs).

The e-campus of the University of Pretoria is an electronic extension of contact teaching and learning activities and other facilities and services. Student Online Services and Lecturers Online provide Internet-based platforms that enable students and staff to access an integrated educational environment from the campus or from their places of work or residence (TLEI, 2002). This infrastructure enables asynchronous access to preparatory, remedial, reinforcing and reference materials, interactive assessment activities, and administrative functions.

Learning management systems (LMSs) have emerged as one of many software systems available to deliver WSL. They are designed with a view to enabling enriched interactive educational communication on the web, and to offer enhanced support to instructors and students as they use the Internet as a medium for learning. The University makes use of the commercially available LMS, WebCT. WebCT offers the following functionality (WebCT(r), 2002):

- Provides access to information and resources;
- Establishes WSL communities;
- Enables electronic assessment; and
- Allows student tracking, self-paced learning and off-campus access.

Lecturers may choose to utilize WebCT at various levels of complexity. Many lecturers begin by using web-supported components at the lower level of simply providing information and resources. Part of the change management role of TLEI is to provide training and support in how to facilitate effective, collaborative and meaningful learning on the web.

Quality Criterion	**8.6**	Staff are trained, monitored, and supported for the specialized roles and tasks they perform, including the design, management and delivery of electronically offered programmes.

Student feedback

A crucial element in a self-evaluation exercise is student feedback.

Quality Criterion	**11.8**	Staff, learners, and other clients are involved in the process of quality assurance and quality review.

In April 2001, the field of student feedback was researched and a student evaluation survey for WSL was developed, using ideas from Hannafin & Peck (1988) and Ramsden (1991): the WebCT Experience Survey (see Appendix 1 to this case study). The survey was programmed in a shareware software package and implemented on Student Online Services, the campus-wide portal from where students access their web-supported courses. Completing the surveys is a voluntary activity for all students registered for at least one web-supported module. Since 2002 the survey has been administered at the end of each semester, namely in July and December. The following response figures were recorded.

Table 1: Number of respondents to the Student WebCT Experience Survey

	2002		2003	
	Sem I	**Sem II**	**Sem I**	**Sem II**
Number of respondents[1]	386	1 476	4 650	1 130
Total number of WebCT students[2]	10 000	14 000	17 000	20 000
Response rate	3.86%	10.54%	27.35%	5.65%

The findings from Semester I, 2003 are summarized here. A wealth of data was gained from the questions designed to provide information such as browser usage, access to technology and usefulness of library resources. The most encouraging findings were that 75% of technical problems were resolved within 24 hours and 66% of students found 'anywhere, anytime' learning to be convenient. Valuable information was volunteered in the open questions, which asked for positive points, negative points and suggestions for improvement.

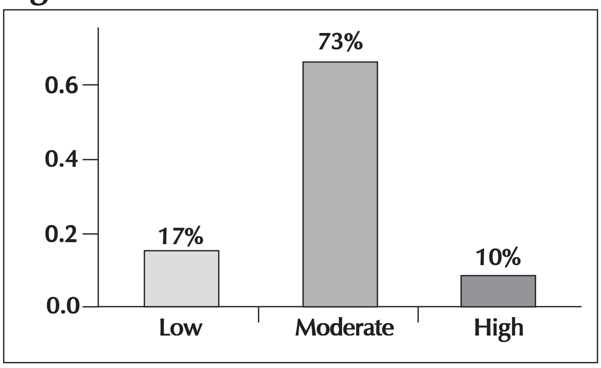
The questionnaire measures more than service and support to students. Items were written according to the following categories:

a. Technical adequacy and technical support;
b. Educational support (supportive resources and training);
c. Affective domain (feelings and emotions of students);
d. Interactivity (use of the communication tools in WebCT);
e. Perceived learning;
f. Lecturer involvement in facilitating WSL.

The first three categories were used to generate a Frustration Index (FI) and the last three categories were used to generate a Satisfaction Index (SI). These indices reflect respectively student frustration or satisfaction with their WSL opportunities.

The findings for the Frustration Index are shown in Figure 1. The percentage of respondents is on the vertical axis and reflected as a percentage on each bar. The levels of the frustration index were grouped according to the categories Low, Moderate and High. These are shown on the horizontal axis.

Figure 1: Levels of the Frustration Index



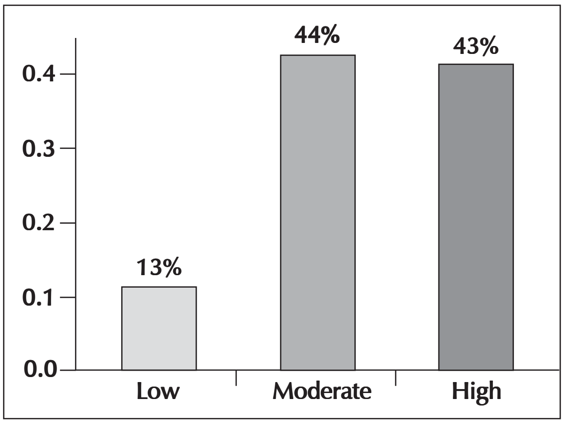
The Frustration Index shown in Figure 1 indicates that 83% of respondents experience moderate to high levels of frustration in their web-supported courses. This statistic is rather high - efforts will need to concentrate on reducing levels of student frustration.

The Frustration Index was investigated in further detail to ascertain the contributing factors. The following factors contributed to student frustration with WSL:

- Insufficient computers available on campus;
- Insufficient printing facilities available on campus;
- Extent of technical difficulties experienced;
- Insufficient support from the student CD-Rom;
- Inadequate student training in WebCT;
- An impersonal learning experience;
- Slow response from classmates;
- Feelings of annoyance and/or stress.

The findings for the Satisfaction Index are shown in Figure 2. The percentage of respondents is on the vertical axis and reflected as a percentage on each bar. The levels of the Satisfaction Index were grouped according to the categories Low, Moderate and High. These are shown on the horizontal axis.

Figure 2: Categories for the Satisfaction Index



It can be seen from Figure 2 that only 43% of respondents experience high levels of satisfaction. Improvement efforts will concentrate on increasing this statistic.

The following factors contributed to the Satisfaction Index:

- Feeling comfortable communicating via online tools;
- Feeling more freedom to express oneself than in a traditional classroom;
- Learning from the contributions of other students;
- Promoting one's ability to work as a team or group member;
- Promoting one's ability to plan one's own work;
- Experiencing an enriching learning environment.

Some of the qualitative responses to the open question about **positive** aspects of WSL highlighted the need for lecturer commitment and involvement, as seen from the sample of student comments given below:

- Discussions with the lecturers and students;
- Contact with lecturers improved;
- Communication with lecturers is made easy;
- Can contact lecturers online;
- The online web has a great impact towards our learning;
- I learned to communicate more to the point and concise;
- It helped me to interact with my fellow student mates and lecturers;
- Learning is best communicating with other people;
- Long distance interaction between lecturer and students;
- Lecturer's and fellow students' contributions.

Lecturer feedback

Lecturer feedback was not formally gathered until 2004. During January 2004, pilot interviews were conducted with a group of 22 lecturers across various faculties, to obtain feedback from lecturers who have been involved in WSL for at least one year. The interview schedule was the Lecturer Experience and Satisfaction Survey, a mix of structured and open questions (see Appendix 2).

Quality Criterion	**9.20**	In the case of electronically offered programmes, the provider ensures the reliability and predictability of a fit-for-purpose teaching and learning delivery platform.

Quality Criterion	**9.23**	Staff and learners are trained in the use of the equipment, facilities, and communication and information systems.

The factors which contribute to lecturer satisfaction with WSL are a sense of security which needs to come from technical reliability and technical support. Some strong reaction emerged with respect to major upgrades to the IT infrastructure, which occurred at the beginning of 2004. Despite timely notification, the extensive technological changes resulted in uncertainty and frustration among lecturers.

Staff and student training were mentioned as vital to ensuring the quality and success of WSL.

Online communication and interaction were recognized as providing benefits in the teaching and learning situation, but organizational and administrative advantages are more practical and quicker to achieve. Several responses reflected the difficulties with respect to the human element - getting the commitment of lecturers and motivating and encouraging students to participate actively in WSL.

Many positive comments were elicited on services rendered by TLEI, for example:

- I really enjoyed working with the team. You people make ME look good!
- Polite, knowledgeable, quick turnaround time, bends over backwards for clients.

- I am amazed every day by the outstanding, enthusiastic and helpful manner in which TLEI encourages, supports and leads us.
- Organized, involved, quick feedback provided.
- The instructional designer really helps us tremendously - she is a valued team member.
- I believe that the instructional designers do not receive adequate recognition for their hard work!
- You were always a phone call away - thanks for that.
- The dedication and outstanding support of TLEI staff members are highly appreciated.
- I have had excellent service. The instructional designer is always willing to help and extremely positive.

The responses to the Lecturer Experience and Satisfaction survey can be summarized as being overwhelmingly positive. There was strong agreement that the e-learning component adds value to the learning experience for students. Excellent support and service from TLEI are valued by lecturers.

Where there were reservations or qualifications to statements, these could be explained by the type and level of WebCT usage in a particular department. Some respondents indicated that they would like to refresh their knowledge of WebCT and engage in the use of WSL at deeper and more interactive levels.

Conclusion

This case study shows that it is important to consider the needs and feedback of 'clients' at both ends of the teaching and learning endeavour, namely lecturers and students. Summative evaluation is an important part of the instructional design process (Smith & Ragan, 1993). It contributes one type of measurement to close the feedback loop and to inform the quality improvement cycle. Ongoing research in TLEI is now focusing on additional measures, both qualitative and quantitative, to evaluate the impact of e-learning and the return on investment for the University.

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Endnotes

1 These are distinct individuals, since the survey was offered via a single link on Student Online Services and completed once by each individual WebCT student who chose to participate.

2 These are distinct individuals, according to their student numbers.

Appendix 1: WebCT experience survey

Dear Student

We are evaluating the quality of the WebCT courses at the University of Pretoria. Please take 3 minutes of your valuable time to complete this WebCT Experience survey. We need to know if you had technical or access problems and how you experienced online learning in general.

Question 1 (You may mark more than one option)	
How do you gain access to a computer?	
☐ My own computer at home	**V1**
☐ My own computer in the residence	**V2**
☐ My computer at work	**V3**
☐ IT computer labs	**V4**
☐ Informatorium computer labs	**V5**
☐ Other computer labs on campus	**V6**
Question 2	
When you need to access a computer on campus, can you find one available?	**V7**
☐ Yes, I always find a computer.	1
☐ I find it difficult to find an available computer.	2
☐ No there is never a computer available.	3
Question 3	
Do you make use of computer facilities on campus for your other University work (e.g. assignments, WebCT), apart from practical computer classes?	**V8**
☐ Yes	1
☐ No	0
Question 4	
If so, for what purpose do you make use of campus computer facilities, besides for practical computer classes? (You may mark more than one option)	
☐ To read my e-mail	**V9**
☐ To access my WebCT course/s	**V10**
☐ To browse the Internet	**V11**
☐ To complete assignments	**V12**
☐ To compile my own notes	**V13**
☐ Not applicable	**V14**
Question 5	
Do you experience a sincere need for printing facilities on campus?	**V15**
☐ Yes	1
☐ No	0
Question 6	
If so, do you find it easy to find a printing facility on campus when you need one?	**V16**
☐ Yes, a printing facility is always available.	1
☐ I find it difficult to find a printing facility.	2

Continues on page 194

Question 6 (continued)	
☐ No, I can never find a printing facility.	3
☐ Not applicable.	4
Question 7	
What is your gender?	**V17**
☐ Male	1
☐ Female	2
Question 8	
What is your age group?	**V18**
☐ Younger than 21	1
☐ 21-25	2
☐ 26-39	3
☐ 40 +	4
Question 9	
Approximately how many times per week did you log on to your web-supported course?	**V19**
☐ Less than once per week (e.g. 3 times per semester)	1
☐ 1 to 5 times per week	2
☐ 6 to 10 times per week	3
☐ More than 10 times per week	4
Question 10	
What was the approximate duration of your online sessions?	**V20**
☐ 1 to 30 minutes	1
☐ 31 to 60 minutes	2
☐ 1 to 2 hours	3
☐ More than 2 hours	4
Question 11	
What Browser do you usually use?	**V21**
☐ Netscape 3.0 or less	1
☐ Netscape 4.0 or later	2
☐ Internet Explorer 3.0 or less	3
☐ Internet Explorer 4.0 or later	4
☐ Konqueror (Unix)	5
☐ Mozilla (Unix)	6
☐ Other Browser	7
Question 12	
What type of technical difficulties did you experience? (You may mark more than one option)	
☐ None	**V22**
☐ Slow Internet access	**V23**
☐ UP network/server being down	**V24**
☐ My Internet service provider being down	**V25**

Question 12 (continued)	
☐ Logon/registration problems	**V26**
☐ Too much material to download	**V27**
☐ Attempted downloads were incomplete/aborted	**V28**
☐ Lack of technical support	**V29**
☐ Some links in the course did not work	**V30**
☐ Other	**V31**
Question 13	
How often did you experience technical difficulties of any sort?	**V32**
☐ Less than once per week (e.g. 3 times per semester)	1
☐ 1 to 5 times per week	2
☐ 6 to 10 times per week	3
☐ More than 10 times per week	4
Question 14	
How long did it take for technical problems to be solved?	**V33**
☐ Half a day	1
☐ 24 hours	2
☐ 2 - 6 days	3
☐ 1 week or longer	4
☐ Never solved	5
Question 15	
To whom did you go to with your technical difficulties? (You may mark more than one option)	
☐ My lecturer	**V34**
☐ The Telematic Learning and Education Innovation personnel	**V35**
☐ Support at Student Online Services	**V36**
☐ My fellow students	**V37**
☐ Client Service Centre	**V38**
Question 16	
If you received the standard Welcome Student CD-Rom, what is your opinion of it?	**V39**
☐ It's great.	1
☐ It's reasonable, but needs improvement.	2
☐ It's poor.	3
☐ Not applicable.	4
Question 17	
Consider the student orientation / training session for WebCT. (You may mark more than one block)	
☐ The session equipped me sufficiently to participate in my web-based course.	**V40**
☐ I could not logon during the session.	**V41**
☐ I was still confused after the session.	**V42**
☐ I feel my basic computer skills are inadequate.	**V43**
☐ I think more student orientation is required.	**V44**

Continues on page 196

Question 17 (continued)	
☐ I did not attend the session.	**V45**
☐ There was no orientation session for my WebCT course.	**V46**
Question 18	**V47**
I felt comfortable communicating via online communication tools.	
☐ Strongly disagree	1
☐ Disagree	2
☐ Agree	3
☐ Strongly agree	4
☐ I don't know / Not applicable	5
Question 19	
Web-supported communication helped me to express myself more than I would have in a traditional classroom.	**V48**
☐ Strongly disagree	1
☐ Disagree	2
☐ Agree	3
☐ Strongly agree	4
☐ I don't know / Not applicable	5
Question 20	
The lack of people's faces, voices and/or body language makes the learning experience impersonal.	**V49**
☐ Strongly disagree	1
☐ Disagree	2
☐ Agree	3
☐ Strongly agree	4
☐ I don't know / Not applicable	
Question 21	
I became frustrated because my classmates were slow to respond to my e-mail and/or discussion messages.	**V50**
☐ Strongly disagree	1
☐ Disagree	2
☐ Agree	3
☐ Strongly agree	4
☐ I don't know / Not applicable	5
Question 22	
I learnt from the contributions made by other students.	**V51**
☐ Strongly disagree	1
☐ Disagree	2
☐ Agree	3
☐ Strongly agree	4
☐ I don't know / Not applicable	5

Question 23	
Web-supported learning helped me to develop my ability to work as a team/group member.	**V52**
☐ Strongly disagree	1
☐ Disagree	2
☐ Agree	3
☐ Strongly agree	4
☐ I don't know / Not applicable	5
Question 24	
Web-supported learning helped me to develop my ability to plan my own work.	**V53**
☐ Strongly disagree	1
☐ Disagree	2
☐ Agree	3
☐ Strongly agree	4
☐ I don't know / Not applicable	5
Question 25	
I found the web-supported course to be an enriching learning experience.	**V54**
☐ Strongly disagree	1
☐ Disagree	2
☐ Agree	3
☐ Strongly agree	4
☐ I don't know / Not applicable	5
Question 26	
I experienced feelings of annoyance and/or stress during this learning experience.	**V55**
☐ Strongly disagree	1
☐ Disagree	2
☐ Agree	3
☐ Strongly agree	4
☐ I don't know / Not applicable	5
Question 27	
I found the opportunities for 'anywhere; anytime' learning convenient.	**V56**
☐ Strongly disagree	1
☐ Disagree	2
☐ Agree	3
☐ Strongly agree	4
☐ I don't know / Not applicable	5
Question 28	
What were the positive aspects you experienced during your web-supported courses? (Please answer in point form and limit your response to a maximum of 4 points.)	
....	**V57**
....	**V58**
....	**V59**
....	**V60**

Continues on page 198

Question 29 What were the negative aspects you experienced during your web-supported courses? (Please answer in point form and limit your response to a maximum of 4 points.)	 **V61** **V62** **V63** **V64**
Question 30 What suggestions can you make to improve your web-supported courses? (Please answer in point form and limit your response to a maximum of 4 points.)	 **V65** **V66** **V67** **V68**

Appendix 2: E-learning lecturer experience and satisfaction survey

Using electronic media in teaching is a different process and experience from conventional face-to-face teaching in terms of changes to pedagogy and the adoption of ICTs. The commitment and willingness of academic staff to adopt e-learning enables the University to respond to growing demands from students for electronic access and to maintain and improve the quality of learning effectiveness.

Important factors contributing to the satisfaction of lecturers involved in e-learning are opportunities for effective online interaction with students with diverse backgrounds and interests, as well as opportunities for leadership, research, publications, recognition, collegiality and professional development (Lorenzo & Moore, 2002). Ongoing staff training and development are essential to ensure staff readiness for online teaching and ICT developments (Oliver, 2002).

Please contribute to our research by completing this survey to establish the extent of lecturer involvement and satisfaction with e-learning and the associated support services at the University of Pretoria.

Department:		
Programme:		
Delivery medium:	WebCT	Multimedia
Project Leader:		
Date:		

Overall effectiveness of the WebCT course or Multimedia programme ('e-learning component')					
	Strongly disagree	**Disagree**	**Neutral N/A**	**Agree**	**Strongly agree**
In my opinion, the e-learning component adds value to the learning experience for students.					
The e-learning component promotes active learning / problem-based learning / learner-centred activities.					
I used the e-learning component to support me in my administrative tasks.					
I found that the e-learning component supported me in the facilitation of learning.					

Rank these online tools according to:	**Discussion**	**e-mail**	**Chat**	**Calendar**
Frequency of your use of the tool: **0=never; 1=seldom, 2=monthly; 3=weekly; 4=daily**				
Your opinion of the tool's usefulness: **0=useless; 1=supportive; 2=indispensable**				

Continues on page 200

My overall evaluation of the worth of this e-learning component in enhancing the teaching and learning experience:	A Excellent	B Very Good	C Good	D Poor	E Un-acceptable
What do you perceive as the worth or value of the e-learning component?					
	High impact	Inter-mediate	Web Page Design	WebCT Designer	Facilitation of e-learning
Which WebCT or facilitation training course/s did you attend?					
Did you attend each training course before, during or after you presented your module? (b=before; d=during; a=after)					
Learning outcomes					
	Strongly disagree	**Disagree**	**Neutral N/A**	**Agree**	**Strongly agree**
The e-learning component contributed to the achievement of subject specific learning outcomes.					
In what way?					
The e-learning component provided meaningful assessment opportunities.					
In what way?					
The e-learning component enhanced the learning experience due to instructional design features, e.g. activities, chunking, resources, interaction.					
In what way?					
Problems experienced					
What problems did you as a lecturer experience in the design and development of this e-learning component?					
What problems did you as a lecturer experience in the facilitation / presentation of this e-learning component?					
Benefits experienced					
What benefits did you as a lecturer experience in the design and development of this e-learning component?					
What benefits did you as a lecturer experience in the facilitation / presentation of this e-learning component?					

<table>
<tr><th colspan="7">Overall evaluation</th></tr>
<tr><td colspan="7">Might there be lessons learnt from this implementation that could be shared for future use?</td></tr>
<tr><td colspan="7">What effect or impact has this e-learning component had on teaching and learning in your department?</td></tr>
<tr><th colspan="7">Quality of service from Department of Telematic Learning and Education Innovation and AIS</th></tr>
<tr><td colspan="7">In the interests of continuous improvement, please rate the service you received from the following units:</td></tr>
<tr><td>Project Management</td><td>A
Excellent</td><td>B
Good</td><td>C
Satisfactory</td><td>D
Poor</td><td>E
Not applicable</td><td>F
Unaware of service</td></tr>
<tr><td>Education Consultancy</td><td>A
Excellent</td><td>B
Good</td><td>C
Satisfactory</td><td>D
Poor</td><td>E
Not applicable</td><td>F
Unaware of service</td></tr>
<tr><td>Instructional Design</td><td>A
Excellent</td><td>B
Good</td><td>C
Satisfactory</td><td>D
Poor</td><td>E
Not applicable</td><td>F
Unaware of service</td></tr>
<tr><td>Graphics</td><td>A
Excellent</td><td>B
Good</td><td>C
Satisfactory</td><td>D
Poor</td><td>E
Not applicable</td><td>F
Unaware of service</td></tr>
<tr><td>Information Service (AIS)</td><td>A
Excellent</td><td>B
Good</td><td>C
Satisfactory</td><td>D
Poor</td><td>E
Not applicable</td><td>F
Unaware of service</td></tr>
<tr><td colspan="7">Other comments related to service and support provided for e-learning:</td></tr>
</table>

Case Thirteen: The quality assurance process for undergraduate courses in the Department of Linguistics at UNISA

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Editor's introduction

This case study offers a detailed account of how staff in the Department of Linguistics at the University of South Africa (UNISA) address the key criterion of **quality assurance** in distance education. The author describes a process that has led to the provision of 'an integrated framework at a policy and practice level that informs a clear cycle of planning, implementing, monitoring, reflection and action to ensure that learners' and staff needs are met' (quality criterion 11). The case also addresses quality criteria in relation to **course design** and **course materials** by describing how courses and materials are developed and evaluated. Three examples of data capturing instruments are included as appendices:

1. A quality assurance form for completion by course writers and course leaders;
2. A quality assurance form for completion by critical readers;
3. A questionnaire to students.

Study material development and design in the Department of Linguistics at UNISA

The Department of Linguistics at UNISA is a federal department incorporating Linguistics, Applied Linguistics and Translation. We offer about 15 undergraduate semester length modules, primarily in Linguistics and Interpreting. Each of these modules is offered to distance learners through printed and electronic course material and tutorial letters. Learners submit assignments and write a final examination. The course material is designed, written, edited, proof read and translated by the academic staff in the department. In the past this team usually consisted of two to four people but recently UNISA has broadened the concept of the team approach to course design to include not only academics, but also instructional designers, graphic artists and so on. This case study focuses on the efforts of UNISA's Linguistics Department to design and implement a quality assurance system for evaluating its undergraduate courses.

Why did we need a quality assurance system?

The Undergraduate Tuition Committee in the Department of Linguistics decided in 2000 that we needed an internal system against which to assess our distance education course offerings. We felt that as a department we needed to ask ourselves whether we were doing the right things in the right way and if we were really achieving what we wanted to achieve. Individual staff needed feedback on their strengths and weaknesses as far as writing study material was concerned - for example, to determine their future training needs, and individual courses needed to be looked at in terms of content, teaching, design, readability and student response. Although we believed that this team approach was a good start to the process of course design and development, we also needed to monitor how our courses were actually working and whether they were successfully meeting students' needs.

The idea was to integrate an ongoing quality assurance process into our ordinary tuition duties, in order to give continuous attention to quality maintenance and to improvement of course design and materials. We felt that the evaluation needed to be multidimensional, incorporating self-evaluation by those who wrote and ran the course, peer review by other academics and feedback from students. In addition, the process needed to be simple, not too time-consuming and preferably not too stressful, either for those doing the evaluation or those whose courses were under the spotlight.

Quality Criterion	**11.8**	Staff, learners, and other clients are involved in the process of quality assurance and quality review.

We decided that over a period of time we would look at all our modules, with the proviso that they had already been offered for at least one semester so that some feedback from students and student assessment data (pass rates, dropout rates and so on) were available. A policy decision was taken that we would not turn our study material into a Guide (which runs in unchanged form for three years) before the quality assurance process had taken its course. Our three first-year modules were evaluated in 2001, followed by the five second-year modules in 2002 and third-year modules in 2003 and 2004. In looking at courses on the same level in the same year, we hoped to get some overall sense of how they compared and if they made up a coherent package that did justice to linguistics as a domain or whether there were inconsistencies or gaps in our offerings.

Quality Criterion	**11.3**	There is a clear cycle of planning, development, documentation, reporting, action and review of policy and procedures.

After a departmental workshop, we came up with the quality assurance procedure outlined below as a starting point, knowing that any evaluation system has to start somewhere and that the system would improve as we went along and learned from our experiences.

The assessment team

To ensure continuity and familiarity with procedures, two individuals from the Departmental Tuition Committee were appointed to drive the process. It is always one of these two individuals who functions as the team leader for each quality assurance team. The Tuition Committee identifies and appoints other team members, always including the current module leader and several critical readers, for example, one who is familiar with the content and the field, and one who is familiar with the level at which the course is offered. We often choose another departmental member who is unfamiliar with the field and can therefore offer a fresh perspective on whether the course content is sufficiently accessible and clear. An instructional design expert from UNISA's Bureau for Learning Development and outside experts from other departments or other universities are also used as critical readers if available.

The assessment process

Standard forms are given to each team to fill in and a timeframe is specified. Three standard forms have been devised, one for the course writer or module leader, that is, the person who is most familiar with the course and how it is working in practice, one for the various critical readers, and a student questionnaire. These are reproduced in Appendices 1 to 3.

We have found that really useful information is elicited through the student questionnaire (Appendix 3), and students are encouraged to submit these with their assignments by being awarded a bonus of 5% for doing so. Questions have been added to the questionnaire and modified over the years, and one suggestion for further improvement is to make this data more quantifiable and suitable for statistical analysis, for example, by using Likert scales in the questions, though this could result in the loss of some of the detailed information obtained from more open-ended questions.

The first step requires the course leader to put a package together, including all materials for that course for the last semester in which it ran (study guide, prescribed book, tutorial letters, examination papers, examination results, assessment criteria, questionnaires received from students, and so on). The course leader writes a self-evaluation of the course (on a standard form), including a list of the outcomes, a description of formative and summative assessment practices, student support and a short strengths/weaknesses analysis.

The package is then circulated successively to each of the critical readers. All the critical readers read the same master copy of the study material and make suggestions and corrections on the same hard copy. The end result is a marked-up copy with input from several different people at the relevant points in the study material and this has proved invaluable for future revision. Each critical reader then fills in the same standard form, ending with conclusions that highlight the strengths of the course and suggest ways of addressing weaknesses.

Quality Criterion	**11.7**	Staff development is a fundamental strategy to promote quality service provision.

The final stage of the process is a workshop attended by the entire quality assurance team. This is an open session and invitations are extended to other members of the Department who may be interested in participating.

The workshops normally last one to two hours and have generally proved to be honest, cordial and constructive, with a surprising degree of consensus between different readers, including the students. The usual format is a brief overview by the course leader which focuses on the course, its purpose and how it is working in practice. Suggestions and

Quality Criterion		
	11.9	There are clear routines and systems for quality assurance and staff are familiar with those that relate to their work.

recommendations are then made by each critical reader in turn after which there is general discussion. All the quality assurance forms and the marked-up copy of the course material are handed over to the module leader as a guide for future revision and plans for future action are made. The Departmental Tuition Committee then follows up regularly to check that the agreed revisions and improvements do take place within the agreed timeframes.

Outcomes and recommendations

The kinds of suggestions and recommendations that have resulted from the evaluation process have been quite wide-ranging. They tend to fall into two groups, namely short-term improvements that can be effected for the following semester or year, and longer-term recommendations. Short-term recommendations have included issues such as correcting typographic errors, breaking up long chapters into smaller, more manageable chunks, changing the format of the assignment and examination, improving the quality of scanned illustrations, adding extra tasks or shortening the course by giving students choices between sections of the work. Some of the longer-term, more labour-intensive suggestions have included doing away with a prescribed book that accompanied a module, moving a module from second-year to third-year level, reworking and simplifying particular study units that stood out as much more complex and demanding than the others, and even merging two or three modules into one.

Benefits

We believe that the quality assurance process has resulted in better course material and better service to students. It has also instilled in the Department a culture of ongoing reflection, appraisal and improvement with regard to tuition. Course writers have enjoyed the opportunity to have their hard work scrutinized, praised and acknowledged, and to be given ideas for future improvements. Critical readers have learnt from and enjoyed the opportunity to evaluate and compare courses and to express their opinions in a way that is tactful and adds value. Identifying strengths and good features in some modules has allowed us to transfer these to new modules we write. Many good ideas and workable solutions to problems have been generated simply by getting a diverse group of people around a table to talk about a course.

The quality assurance procedure has also made us more confident about turning our study material into Guides that run for three years and about posting our study materials on the Internet in electronic form. Being a federal department teaching Linguistics, Applied Linguistics and Translation, it has given us better insights into each other's disciplines and improved intradepartmental co-operation. More staff are now familiar with particular courses and have been able to give discussion classes or assist students if called upon to do so. We hope that our experience of evaluating courses and of having our own courses evaluated will mean that we are ready and enthusiastic rather than anxious if an externally-imposed system of quality assurance becomes a university or government requirement.

Appendix 1: Quality assurance form for course writer(s)/course leader

Please attach the following documents to this completed form and tick the appropriate box. (The documents should relate to the semester that has just been completed.)

	Copy of official syllabus
	Study guide
	All other tutorial letters for the course
	Prescribed book or reader
	Examination paper and memorandum
	Mark summary (i.e. statistics relating to student assignment and examination results)
	Completed questionnaires returned by students
	Tutor guidelines
	Group visit package (overheads, handouts etc.)

Information sheet

General				
1. Course code				
2. Level	1st	2nd	3rd	M
3. Team members and roles, e.g. writers, critical readers, current module leader etc.				
4. Semester and year, e.g. S2 2004				
5. Which programmes does the course serve?				
Study Package				
6. No. of pages of guide students have to read				
7. No. of pages of prescribed book students have to read				
8. Total no. pages students have to read				
9. Approximate no. terms that must be learnt				
10. No. of figures/diagrams/illustrations				
11. No. of tasks built into the material				
12. Readability measure for guide (if available)				
13. Readability measure for prescribed book (if available)				
Student Statistics				
14. No. students registered				
15. No. assignments received				
16. Average percentage in assignment				
17. No. students who wrote the examination				
18. Pass rate (% passed/written)				
19. Average percentage in examination				
20. Dropout rate (% not written/registered)				

Self-assessment

1. What is the purpose of the module?

2. What are the outcomes?

3. What is taught and how?

4. How does this module relate to/complement other modules on the same level and the departmental offerings as a whole?

5. How are students assessed?

6. Are there choices within the module? If so, which sections do students tend to choose and in which do they do best? (Attach data if possible).

7. How is student support built into the course?

8. How many student queries were received and what was the nature of these queries?

9. What do you see as the strengths of this course?

10. What do you see as the possible weaknesses of this course?

11. Any other comments?

Signature__________________________________ Date _________________

Appendix 2: Quality assurance form for critical readers

Scale: 1 Definitely 2 Mostly 3 To some extent 4 Mostly not

Tuition					Comments
1. Does the course content match the official syllabus?	1	2	3	4	
2. Is the course content up-to-date?	1	2	3	4	
3. Is student support successfully built in?	1	2	3	4	
4. Is the material suitable to the level in terms of content complexity/term density?	1	2	3	4	
5. Is the material suitable to the level in terms of style/language accessibility?	1	2	3	4	
6. Is the prescribed book suitable in terms of its content?	1	2	3	4	
7. Is the prescribed book suitable for the level in terms of its style/language accessibility?	1	2	3	4	
8. Is the course material outcomes-based?	1	2	3	4	
9. Are the outcomes clear?	1	2	3	4	
10. Are the outcomes achievable?	1	2	3	4	
11. Are the outcomes assessable?	1	2	3	4	
12. Are the tutor guidelines successful?	1	2	3	4	
13. Is the group visit package successful?	1	2	3	4	
Editorial					
14. Is the layout attractive?	1	2	3	4	
15. Average no. of editorial errors per page?	1	2	3	4	
Assessment					
16. Is the course efficient in terms of the amount of marking required?	1	2	3	4	
17. Are assignment and examination questions appropriate for students at that level?	1	2	3	4	
18. Are the assessment methods varied? (e.g. formative and summative, self-evaluation and lecturer evaluation, written and oral exams etc.)	1	2	3	4	
19. Are there enough tasks in the guide /workbook?	1	2	3	4	
20. Are the tasks properly integrated into the material to make a coherent whole?	1	2	3	4	

21. Are the tasks relevant and meaningful? (i.e. do they relate clearly to the study material, expected outcomes, student needs and possible problems?)	1	2	3	4	
22. Are tasks varied? (e.g. portfolios, simulation, data collection, MCQs etc.)	1	2	3	4	
23. Is there sufficient feedback to self-assessment tasks?	1	2	3	4	
Student Results					
24. Are examination results in line with departmental standards?	1	2	3	4	
25. Do assignment and examination marks correlate?	1	2	3	4	
26. Is the dropout rate acceptable?	1	2	3	4	
Questionnaires					
27. Do first-language English students respond positively to the course?	1	2	3	4	
28. Do second-language English students respond positively to the course?	1	2	3	4	
Translation					
29. Is the translation clear and accurate?	1	2	3	4	
30. Average no. of editorial errors per page?					
31. According to the questionnaires, do Afrikaans students respond positively to the Afrikaans course?	1	2	3	4	
Conclusions					
32. What do you see as the strengths of the module?					
33. What do you see as the weaknesses of the module?					
34. What recommendations can you make for future improvement?					

Signature ______________________________ Date ______________

Appendix 3: Student questionnaire

In this portfolio task (30 minutes) we ask you to reflect on your experience of the course as a whole.

Name ....

Mother tongue ....

I am registered for a .... degree/programme

and my chosen majors are ....

Why did I choose to take this course?

Which study unit did I enjoy the most and why?

Which study unit did I enjoy the least and why?

Was the course material easy to understand or difficult?

Do I have a better understanding of other language groups/cultural groups than I did before?

Does the course have any practical applications in the real world, e.g. for the work I currently do?

What aspects would I like to know more about or study further?

How could the course be improved?

Other comments about the course

Case Fourteen: The Masters programme in International Trade Law offered by the Faculty of Law, University of Stellenbosch

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Editor's introduction

As with the case study on the Fort Hare B Prim Ed, this case study has been written by an outside researcher. The case study is based on work done for the Council on Higher Education.[1]

With higher level postgraduate programmes, the distinction between face-to-face and distance delivery tends to become blurred. This is mainly because students do increasing amounts of independent work - a feature of distance study. However, it is also true that students at higher postgraduate levels want a relationship with a particular institution because of the specialist expertise that resides in that institution, rather than because of general effectiveness in teaching, learning and research, or because of proximity to their home or place of work. It makes sense, therefore, to use distance education methods to make specialist expertise as widely available as possible for postgraduate studies. This case study analyzes carefully how the Stellenbosch LLM uses technology for this purpose, and exemplifies the criterion:

> **1.4** The provider or programme management team can provide a rationale for the use of distance education or electronic learning methods for the delivery of the programme/course to the intended target learners.

A second feature of postgraduate programmes in a globalized higher education environment, is the use of technology to facilitate collaboration in programme design and delivery across distances which would not previously have been conceivable. Even though challenging from a management and technical perspective, collaboration is a condition of globalization. This case study illustrates well the quality criterion for **collaboration**:

> **10.** In the interests of cost-effective provision of education and training, collaborative relationships are formed and collaborative projects are undertaken wherever possible.

As the author indicates, this case study also assists reflection on the relationship between two other quality criteria: **results** (in the sense of success rate for students) and **learner support**. Although there are compelling arguments for distributing postgraduate programmes widely through the use of distance and electronic learning methods, it cannot be assumed that learners at postgraduate levels can do without learner support. In particular, providing adequate supervision of postgraduate research using distance education methods is an abiding challenge. Although the case study argues differently, perhaps a reason that a fair proportion of students do not complete the research report (and therefore do not graduate), is the difficulty of undertaking research at a distance and in a language which may not be their own.

Background

Introduction

In 1998, the University of Stellenbosch, traditionally a face-to-face institution, formally committed itself to offering distance education in selected postgraduate niche programmes. A decision was also made that technology that would facilitate the optimal degree of synchronous delivery should be employed.

Stellenbosch refers to the mode of distance delivery it uses as interactive telematic education (ITE). The purpose of this case study is to examine one such programme, the LLM in International Trade Law, with specific focus on:

- The use of a range of media for delivery of the LLM programme;
- The collaborative approach to delivery of the programme (use of experts from different institutions);
- The importance of language support not only for foreign students, but for South Africans whose first language is not English; and
- The significant difference between module pass rates and programme throughput in the LLM and the reasons for this.

These four aspects of the programme design and delivery will be discussed in relation to the relevant Quality Criteria for distance education in South Africa.

Brief overview of the LLM programme

Quality Criterion	
4.1	The course is designed with national needs as well as the needs of prospective learners and employers in mind.

The LLM in International Trade Law course work masters degree has been offered as a face-to-face programme by the Faculty of Law since 1997. Because of numerous requests received from legal practitioners across the country to be accommodated on the programme, it was adapted for distance education delivery in 1999.

It is noteworthy that in 2003, the enrolment on the face-to-face version of this programme was 30 while on the distance education version the enrolment was 50, which is a substantially larger number of students than on the face-to-face programme. The distance education programme is designed for part-time study over a period of two years.

This programme comprises the following modules:

- International Commercial Arbitration;
- Public Law Aspects of International Trade;
- International Business Transactions A and B (which for the distance education programme will normally be consolidated into a one-year course); and
- Research Report submitted by the student.

The LLM is targeted at attorneys and advocates, providing specialized postgraduate training for qualified lawyers. South African law faculties largely neglected international trade law during the apartheid era as a result of sanctions. Now with South Africa's resurgence as an important trading nation, this field of law is becoming more and more important. However, although International Trade Law remains a highly specialized and as yet rather underdeveloped field of law in South Africa, this programme is highly thought of even beyond South Africa. This is evidenced in each new student intake: specifically on the face-to-face version of the LLM, a significant number of the students are foreign, predominantly from Germany.

On successful completion of the LLM, it is envisaged that South African legal practitioners involved in commercial work (particularly those acting on behalf of clients involved in international and regional trade investment) and legal advisors of companies and government departments will be in a position to extend their professional practice by operating in this field.

Brief overview of programme delivery

Apart from the research project mentioned above, in each of the four modules students are required to do an assignment, which entails application of rules and principles studied in the given area of law in order to solve a legal problem. Assignments serve to scaffold preparation for the examination that is written at the end of each module. The assignment is weighted at 40% of the final mark allocation for the given module.

As part of the interactive telematic education approach, satellite technology is used to broadcast the lecturer's input to students. The rest of the teaching and learning relies largely on the students' self-study of extensive readers comprising case studies, legislation, rules and legal articles. Course notes and tutorial letters prepared by the lecturers support self-study.

Quality Criterion		
	4.2	The elements of the course and the relationships between them are consciously planned.

In line with the University's policy for postgraduate study programmes, the language of instruction is English.

Student profile

In 2003, 50 students enrolled on the programme. Of these, 36% were African, 8% Coloured, 4% Indian and 52% White. 76% of the students were male and 24% were female. The majority of the students were between 35 and 45 years old. Although the data on language is only approximate, on a conservative estimate it appears that at least 50% of the students were not first language English speakers. Most of the students were located in Gauteng, Western Cape and Eastern Cape, with a few dotted around the rest of South Africa. Five are located outside of the country. All are practising lawyers.

Quality Criterion	**2.1**	The provider has developed a learner profile that identifies the characteristics and situation of distance education learners.

Selected aspects of programme design and delivery

Use of a range of media for programme delivery

The design of the LLM International Trade Law programme is characterized by the use of a range of media for delivery. These include various forms of print based materials, satellite broadcasts and/or video.

Quality Criteria	**3.4**	There is a careful analysis of the most appropriate technologies to support: • The provision of course materials to learners • Other teaching and learning processes • Management and administration of the programme.

Quality Criterion	**3.5**	The selection of technologies is based on the needs, resources and capabilities of the learners and the provider, and the purposes of the programmes on offer.

The print-based component of the programme is substantial. For example, in the semester module, International Commercial Arbitration, the two-volume reader adds up to about 2 800 pages. Tutorial letters, course notes and lectures broadcast by satellite are used to mediate the content, serving to introduce and frame sections of independent study. Video copies are made of all satellite broadcasts and are available to all students.

The way in which this range of media is integrated for programme delivery is discussed in greater detail below.

Print-based materials

As stated above, print-based materials form a major part of each module. Students are expected to spend an average of 8 to 10 hours each week working through the articles, legal case studies, legislation and rules contained in the two-volume reader. A set of course notes accompanies each reader. In modules which make use of one or more textbooks, these are provided by the university as part of the materials pack. The cost of all materials including the textbooks is factored into the fees.

The course notes that accompany the readers assist students initially to work through these texts. Prior to each satellite broadcast lecture, students also receive a tutorial letter which serves both as a guide for what is to be covered in the lecture as well as a response to questions and concerns raised by students in the previous lecture. In commenting on the programme, students said that the technical nature of much of the presented content required a lot of preparation preceding the lecture. If one were not well-prepared for the lecture, it would be difficult to keep up.

Satellite broadcasts

The LLM in International Trade Law is an example of a small-scale highly specialized niche programme that, through the use of satellite broadcasts, facilitates access to students unable to attend lectures on campus. While the initial capital outlay required for setting up and equipping the broadcast studios at Stellenbosch University was a considerable expense, receiving the broadcast does not entail great expense. The equipment required is a television set, a satellite dish and telephones. Once the equipment is purchased, the cost per study centre is R250 per two hour satellite broadcast session, which includes the services of a 'technical support' staff member in each centre whose function it is to open the centre, switch on the TV, help students to log on, and so on. This means that centres can be set up on an ad hoc basis to accommodate the needs of individual students. The use of this medium for programme delivery is thus flexible enough to reach individual students in small towns in far-flung areas across the whole of South Africa.

Stellenbosch University has a partnership agreement with the University of Port Elizabeth and together they share 30 studios situated in various centres (in schools, libraries, community centres etc.) across South Africa. However, to meet the geographic spread of the 2003 student intake on the LLM programme, only 12 of the possible 30 centres were used. In seven of the 12 centres, only one or two students attend lectures.

Synchronous or real-time lectures broadcast by satellite take place on a Saturday to accommodate the students who are all in full-time employment. Four two-hour lectures, totalling eight hours are delivered during the 15 week semester. Although in these sessions students are spatially separated from the lecturer, the fact that they take place in real-time effectively means that these lectures serve as contact sessions. This medium also has the technical capacity to facilitate interactivity by offering the possibility of discussion between the lecturer and the students via satellite phone. The lecturers use these sessions primarily to frame new content, to focus on application of relevant principles of statutory provision, to distil problems and challenge students to engage critically with the content. Student respondents remarked that this medium helped to 'take the distance out of distance education by 'seeing' the lecturer'. The fact that these 'contact' sessions are integrated into the delivery of this programme serves not only to support students academically but also provides an opportunity for the lecturer to monitor attendance and participation by students.

Quality Criterion		
	7.10	Contact sessions are integrated into the course design, rather than being an add-on extra.

Quality Criterion		
	4.4	Choice of media and technology is justified in the light of the aims of the course, required learning outcomes, learner needs, capacity to access and use the technologies, the physical features of the teaching sites and available facilities and services.

During the lecture observed,[2] the lecturer structured a number of questions into his presentation, but was forced to try and elicit responses from students, as in this particular session, the students were not very forthcoming. This raises another important point, namely that it is not the medium alone that is important, but rather, how it is used in combination with other media and/or learning and teaching strategies. In discussion with the lecturer he reflected on the importance not only of provider-initiated support, but of encouraging students to meet and interact with each other. He commented on the fact that where such 'communities of learning' had been established, the level of debate and general engagement in the satellite sessions had been much richer.

In terms of choice of media and technology, the LLM illustrates criterion 4.4 very well. The use of satellite broadcasts as a key component of the delivery strategy in the LLM International Trade Law programme is 'justified' on various grounds. In terms of 'learner need' - given the highly specialized nature of this course, there would, for example, not be much point in appointing non-specialist tutors. The 'need' is for technology that can expose students to the expert lecture. For this reason the use of this medium is particularly appropriate. Secondly, it promotes 'access' to students who do not live and work within easy reach of the Stellenbosch campus (the University of Stellenbosch is currently the only institution in South Africa offering this programme). Moreover, as seen above, the fact that this medium is 'flexible' enough to facilitate delivery to individuals or very small groups of students further underscores this point. To this end 'the choice of media and technology is justified in the light of the aim of the course' which is to provide specialized postgraduate training to qualified lawyers - who are most likely to be spread around the country in full-time employment and thus unable to study full time on campus.

While the nature of law as a field of study is canonical, within this orthodoxy, the programme requires students to apply themselves critically to problem solving in the relevant applied situations. The satellite lectures (and tutorial letters) are a key means to framing and distilling problems, challenging students to focus on practical application of relevant principles and statutory provision, thereby supporting students in their attainment of the 'required learning outcomes' such as Outcome 2 of the LLM programme, 'the ability to find, read, analyze, interpret and critically evaluate legal literature from all sources...' and Outcome 4, 'demonstrate knowledge and ability to work with relevant legislation and other legal instruments on a comparative basis to solve relatively complex problems likely to arise in practice'.

Quality Criterion	**4.9**	Content, teaching and learning strategies and assessment are carefully structured to facilitate the achievement of the learning outcomes.

The medium has the potential to be interactive, thus affording students the opportunity to engage in dialogue with their lecturers. Given that the satellite technology can fairly easily and cost effectively be made accessible to individual and small groups of students, means that it 'is justified in terms of learner needs and capacity to access and use the technologies'. Additionally, as already stated, receiving the broadcast does not entail great expense. The maintenance of the centres dotted around the country does not require high level technical skills, thus justifying the use of the satellite technology in terms of the 'available facilities and services'.

Video recordings

Video recordings are made of each broadcast and serve as backups for students who are unable to attend a given broadcast, or who would simply like a recording for their own study purpose.

The university has a service agreement with Telkom that supports the delivery of the satellite lectures, and the rates of connectivity stand at 98.4%. However, videos can serve as backups in case problems in transmission occur. This helps to ensure that provision is not disrupted and that teaching and learning can go on.

Quality Criterion	**9.22**	There are emergency methods of communication for use in the event of a failure of the primary channel of communication, and these are fail-safe.

The videos are also sent to the five students who are studying outside South Africa and who are therefore unable to receive the satellite broadcasts.

To summarize, the use of the above range of media was carefully considered in the programme and course design to facilitate delivery that is appropriate to the nature of the programme/course, the capacity of the institution and the needs of the students.

Systems and processes that support the integration of a range of media into programme delivery

Within the university, the Division of Institutional Design is dedicated to supporting academic staff in courseware design. The emphasis in the Division of Institutional Design is on skilling people to do their own materials development, rather than functioning as a 'design bank'. The Strategic Initiatives Division (previously called the Division for Distance Education) offers training and technical support for lecturers to use the satellite technology effectively.

Quality Criterion	**4.15**	The educational provider gives authors, consultants, and others involved in the course design and development process necessary guidance and training regarding aspects of distance education in order to assure quality in their work.

During the delivery of the satellite lecture observed, the lecturer in question was clearly very well prepared and made full use of the time allocated and the technological features available. Over and above the lecture mode employing a power point presentation, the lecturer used a range of techniques to facilitate learning:

- Readings from texts that had been specially highlighted were included in the presentation so that students could follow the texts on their TV screens;
- Key points were written up on the white board provided;
- Questions were directed to particular students using the satellite telephone; and
- An interactive quiz was set up which students responded to by pressing specific keys on their satellite telephones.

Quality Criterion	**4.16**	An appropriate infrastructure exists within the educational provider to administer the range of elements of the course efficiently.

In another satellite lecture observed, use was also made of a short video clip. Successful use of satellite broadcasting as a medium for programme delivery is time consuming as it requires thorough preparation to avoid embarrassing silences, fumbling for relevant texts and so on. Any attempt at 'busking' one's way through a lecture of this kind would be even more obvious than in an ordinary classroom situation. The lecturer concerned commented that it required on average between four and six hours to prepare one two-hour session. Equally important is the technical ability of the studio technician to properly manage the smooth transitions from one mode of presentation to the other during the video broadcast; for example, the ability to switch the camera focus from the power-point to the whiteboard without causing any delays.

The programme co-ordinator of the Department of International Trade Law works in close collaboration with the Strategic Initiatives Division to co-ordinate the reproduction and delivery of print-based materials such as the readers, tutorial letters, assignment briefs, and so on. This division is also responsible for sending out the video copies of the satellite sessions to students. Tutorial letters and assignment briefs are developed by the relevant lecturers and are sent electronically to those students who have e-mail access. The rest are sent by courier service as the post is considered to be too unreliable.

The lecturer sets examinations and the papers are distributed and collected by the central University examination division.

Quality Criterion	9.10	Production and delivery of course materials is fast, accurate, and reliable. Where existing systems prove inefficient, creative alternatives are found.

Depending on whether student queries are of an administrative or of a more academic nature, they are directed to either the Strategic Initiatives Division or the LLM programme co-ordinator. Student respondents all confirmed that systems for materials delivery were effective. Where hitches occurred, these were resolved by administrative staff - 'all it takes is one phone call!'

Quality Criterion	7.17	Learners have access to the facilities (for example, libraries) and equipment that are necessary for their successful learning.

Additional infrastructural support is offered by the library, which has made specific provision for distance education students by appointing a designated librarian to deal with distance education students.

A specialist legal librarian's services are also used to assist distance education students enrolled in Law programmes. The students are allocated 200 rands worth of photocopying (taken from their fees). They may thus request the librarian to send them photocopied articles. Librarians also do searches for the students, who confirmed that this service was invaluable, especially when they were preparing their research reports.

A collaborative approach to programme delivery: Use of experts from other institutions

International Business Transactions A and B is a compulsory double module consolidated into a one-year course. One of its three components is Charter Parties in Shipping Law. To offer this component, the specialist knowledge of the Professor of Maritime Studies at the University of KwaZulu-Natal (UKZN), a recognized expert in this field, has been brought in. Working collaboratively with the other academics involved in the design and delivery of the above course, this professor is responsible for all aspects of the design and delivery of this particular component. This includes taking responsibility for compiling and updating the reader each time the component is offered, preparing tutorial letters, assignment briefs, lecturing and marking and providing feedback on the assignments. It also includes setting examinations with informal input from at least one colleague and marking the relevant component.

> Quality Criteria
>
> **10.1** Wherever possible, collaborative relationships are formed for:
>
> - sharing developed courses;
> - jointly developing new courses;
> - sharing facilities such as libraries and learning centres;
> - sharing regional centres for learner registration, distribution of study material, and examinations;
> - jointly delivering programmes;
> - collaborating in research.

> Quality Criterion
>
> **10.5** In the organization of consortia for programme development or delivery, structured contractual relationships are formed to protect the interests of all parties including the learners.

This collaborative approach is facilitated by a contractual arrangement set up between the two Law Faculties at the respective universities. It is a straight financial transaction whereby Stellenbosch buys in the expertise of the professor. This collaborative relationship is seen to be both cost-effective and promoting quality. Outsourcing delivery is used as a strategy for providing education in a specialist field which Stellenbosch University would otherwise not have had the capacity to offer. The result is therefore one in which through the collaboration on the joint development and delivery of programmes/ courses, the ultimate quality of the qualification as a whole is enriched.

A similar arrangement exists between the University of Stellenbosch and the Bremen University Law Faculty in Germany. The LLM International Trade Law Programme Convenor and Professor in International Business Transactions teaches one of the LLM modules in Bremen each year. Closer to home, the Law Faculties at the three Western Cape universities, University of Stellenbosch, University of the Western Cape and the University of Cape Town have entered into a collaborative agreement whereby students registered for a course work LLM at any one of the three universities, may elect to do a module at either or both of the other universities.

The importance of language support for students whose first language is not English

Learner Support

Given that the LLM is a higher level postgraduate degree targeting professionally employed people, it is probably fairly safe to make certain assumptions regarding academic support, namely that these students have been through at least five years of previous study (LLB) and that they can therefore take responsibility for their own needs and are able to be proactive in requesting support when necessary. In general, it has been found that this is so.

Yet, in the self-evaluation process undertaken by the Law Faculty in 2003, a concern was raised regarding the language ability of students on the LLM in International Trade Law programme. As already mentioned, the language of instruction on this programme is English and the students are required to write the research report in English. However, more than 50% of the students are not first language English speakers (this includes those whose first language is Afrikaans). Unfortunately, many lack the English language skills to write proficiently.

It was noted that this problem places both the students and the lecturers involved under enormous pressure as students struggle to produce the required reports and lecturers have to spend extended amounts of time on marking and reworking reports with students.

The university has a Language Centre, but it offers tutoring of English language skills only to foreign students such as the German students on the face-to-face LLM programme. In terms of learner support, the quality criteria specifically call for early identification of problems. However, by the university's own admission, this has not been done in respect of language support. To remedy the situation, the Department of International Trade Law has also suggested the following:

- Entry level tests for English additional language speakers to facilitate early identification of inadequate writing skills for unassisted completion of research projects;
- Language courses focusing on writing skills provided by the University;
- A University facility that will assist students to improve their written work before it is handed in for assessment.

In the context of South African higher education in general and distance education in particular, the question of language is clearly one that needs additional investigation. In this case study, the issue of language serves to underscore the importance of appropriate academic support for students as a key factor contributing to the student's having a fair chance of succeeding - even in a high level postgraduate qualification.

The significant difference between pass and throughput rates

While the focus of this subsection deals with some of the reasons for the significant difference between pass and throughput rates in this programme, it might be useful to set out briefly the assessment procedures and processes used so as to contextualize the issues pertaining to success rates on this programme.

Brief Overview of Assessment Procedures

The assessment strategy for the LLM in International Trade Law programme offered by distance education includes the following:

- One assignment for each of the four modules (each assignment is approximately 2 000 words);
- One written open-book examination at the end of each of the four modules; and
- A research project of 10 000 - 15 000 words to be completed by each student after successful completion of the course work. This research task is weighted to be equivalent to a whole module. There is no time limit placed on completion of the research report.

Graduation is dependent on successful completion of all of the above.

Quality Criterion	6.4	There is a range of formative and summative assessment tasks and methods which ensure that all learning outcomes are validly assessed.

The assignments afford an opportunity for formative assessment. Each student receives detailed written feedback on their assignments and the lecturer also writes a commentary noting general issues and in some instances model answers are also provided. These are distributed to all students. Lecturers use the lecture session as an opportunity for giving feedback on assignments. The assignments count for 40% and the examinations count 60% of the final mark.

Quality Criterion	**6.14**	There are clear procedures to receive, record, process, and turn around assignments within a timeframe that allows learners to benefit from formative feedback prior to the submission of further assessment tasks.

The professor responsible for delivery of the International Commercial Arbitration module said that he spent two full days marking and preparing commentary on each assignment. So even though, at a first glance, a 2 000 word assignment might appear to be rather little at master's level, the assignments are in effect problem-based legal case studies that require a succinct legal opinion. The reading and preparation that is required to produce these assignments is clearly as important as the actual written formulation.

All students commented on the usefulness of the feedback received on assignments and said that it also served as excellent support for examination preparation. The examination at the end of each module serves as a strategy for summative assessment.

Success Rate

The success rate of students on a programme can be understood in two broad ways:

1. **As the course/module pass rate** - the number of students that pass a particular course or module within a given programme.
2. **As the programme throughput rate** - the number of students within a particular student cohort that successfully complete an entire programme. In this case study, throughput has been calculated on the basis of two student cohorts, the 1999 and 2000 intake. Although the LLM is considered to be a two year, part-time programme, in both instances an additional two years has been factored in on the assumption that students on this programme are all in fulltime employment in demanding professional positions and thus have significant time constraints. It is therefore reasonable to allow more time for completion. So a period of four years has been allocated for the calculation of throughput results (also remembering that in fact the Law Department itself places no time constraints on the completion of the research report).

The following tables show both kinds of success rates in the LLM programme.

Table 1: Module pass rates for two cohorts (1999 and 2001) across all four modules of the LLM in International Trade Law

	International Commercial Arbitration (1 Module)			Public Law Aspects of International Trade (1 Module)			International Business Transactions (Results of 2 Modules combined)		
	No of students enrolled	No that passed	Total %	No of students enrolled	No that passed	Total %	No of students enrolled	No that passed	Total %
1999	43	39	**91%**	41	34	**82%**			
2000							59	46	**78%**
2001	25	22	**88%**	36	23	**64%**			
2002							42	29	**69%**

Note: The course pass rate is calculated by comparing the enrolment figure with the final percentage number of students that pass the given module.

Table 2: LLM in International Trade Law programme throughput rates for two cohorts (1999 and 2000)

Date of enrolment	No of students enrolled	No of students successfully completed by 2003	Total %
1999	41	19	47. 5%
2000	20	73	5%

Note: The programme throughput rate is calculated by comparing the enrolment figures in 1999 and 2000 respectively and with the final percentage number of students that successfully complete the whole LLM programme by 2003.

It can be seen from the tables that the course/module pass rates on the LLM programme are significantly higher than programme throughput rates.

A significant difference between pass and throughput rates is not uncommon in distance education. It is a cause for concern because it could reflect on the quality of the programme - that it does not keep track of students sufficiently well or provide sufficient guidance or support for the more difficult modules/components. However, pass/throughput rate differences could simply be a reflection of the greater flexibility offered to students through the use of distance delivery. Students might not have the time to do more than one course at a time, or might want to take only certain courses so as to qualify for certain work-based promotions, or because they are interested only in those courses rather than the whole degree.

In the LLM programme, while the difference between course pass rates and programme throughput might seem large, it is in fact not as significant as it seems. Differences between pass and throughput rates in many distance education programmes are typically even larger than the ones reflected in this case study (for example, throughput rates on many longer programmes, especially at the dedicated distance institutions, may be well under 10%). In addition, the reason for the difference can largely be attributed to the student's purpose for studying (or, in a few instances, non-payment of fees), rather than failure of the programme to track or support students.

Students interviewed all reflected their satisfaction with the quality of the programme and felt that they had attained the intended outcomes.

Quality Criterion	**13.4**	Learners and recent graduates are generally satisfied with the programme (in particular it learner support and assessment practices) and its staff.

The programme has also been evaluated and the academic and professional community is satisfied with its quality.

Quality Criterion	**13.3**	Expert peers/professional bodies are satisfied with the relevance and quality of learning achieved by learners on the programme.

As all students are practising attorneys or advocates, it appears that they are more concerned about gaining the knowledge and skills required to practise in this field than in obtaining the qualification. Despite successfully completing the four modules, they defer completion of the research component indefinitely, and therefore never obtain the LLM qualification.

Quality Criterion	**13.5**	Employers/ the professions/ the community (as appropriate) are satisfied with the quality of the graduates from the programme.

Also of interest is the fact that when compared, there was no significant difference between the success rate of the LLM offered through distance education and the LLM offered residentially. This supports the notion that the difference is attributable not to quality differences in mode of delivery, but rather to relevance to professional need.

However, the relatively small numbers of students that complete the programme successfully are a cause for concern for a providing institution, if not for its students. The per student cost of the programme design and delivery automatically rises in inverse proportion to the number of students that successfully complete the programme. Additionally, the state subsidy paid out for throughput is forfeited. So although pass, throughput and retention rates are monitored, and are proportionally not as bad as in some distance education programmes, the difficulty does need to be addressed.

Conclusion

In examining some selected aspects of programme design and delivery this case study focused on aspects of good practice as well as problematizing a number of related issues. Overall, the research clearly demonstrates that the LLM in International Trade Law is a good example of a quality distance education programme, responsive to a clearly identifiable need.

The use of the particular range of media is appropriate given the nature of the programme which requires the expert input of the lecturer to mediate a strongly text-driven programme. The use of the satellite technology for this purpose facilitates access to mature, professionally employed students that are spread across the country, providing an opportunity for highly specialized professional development that is directly relevant to the workplace.

Although this medium does have the potential to be used interactively, allowing for dialogue between student and lecturer, it was noted that this aspect of the technology may be under-utilised. While student respondents remarked on the fact that this medium helped to 'take the distance out of distance education' they also reflected that they still feel intimidated by the technology and the notion that they 'might make a fool of themselves and that so many other students around the country would hear'. It therefore seems that despite the careful scaffolding of the delivery in this programme, the lack of opportunity for students to share ideas with one another is an area that could be improved on, possibly by setting up some kind of e-mail discussion group.

The collaborative approach to design and delivery on the LLM programme, in this case the buy-in of expertise from another higher education institution, has enriched the quality of the programme considerably in a cost effective way. In addition, the relationship which has been set up between the three universities in the Western Cape serves as a particularly imaginative model for regional collaboration on small enrolment specialist courses.

Given South Africa's history of poor language teaching at school level and the multilingual nature of our country, issues around students' language ability need to be carefully examined. Even on this higher post graduate programme targeting qualified legal practitioners, the students' lack of English writing skills has been identified by academic staff as a problem. Some measures have been suggested for dealing with this issue in the context of this programme. However, the importance of language support in distance education as a whole needs attention.

The often significant differences that typically occur between acceptable course pass rates and very low programme throughput rates in South African distance education programmes are a cause for concern. While the differences on the LLM programme are not necessarily significant, it remains an important but unresolved issue in the delivery of this programme.

Endnotes

1 Council on Higher Education. (2004). *Enhancing the Contribution of Distance Higher Education: Report of an investigation led by the South African Institute for Distance Education*. Pretoria: Council on Higher Education

2 The case study researcher, in addition to interviews and document review, observed two satellite broadcast lectures.

Who is NADEOSA?

On 2nd August 1996 fifty-eight organizations involved in distance education formed an association committed to promoting access to lifelong learning of high quality. Participating institutions included public, private-for-profit and non-governmental organizations. All were united in their belief that distance education methods could play a major role in facing South Africa's enormous educational challenges.

What are the aims of NADEOSA?

The overarching aim of this Association is to provide a forum for South African organisations and individuals who are committed to increasing access to an affordable, cost-effective and quality learning environment in which learners are empowered to become self sufficient members of society.

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'A significant contribution to the quality debate and an invaluable guide for institutions committed to improving the quality of distance education'
- Saleem Badat, CEO of the Council on Higher Education

'The book shows that quality is a dialogue between criteria and practice'
- Barney Pityana, Vice Chancellor of the University of South Africa.