Fort Hare Distance Education Project: B. Prim ED

INTRODUCTION

This report comprises a case study of the University of Fort Hare’s Distance Education Project’s (FHDEP) B. Prim. Ed programme. The case study was undertaken for two purposes:

- as part of SAIDE’s ongoing research into general critical success factors for the successful implementation of Distance Education in rural areas; and
- as background to specific research into how the FHDEP learners engage with the printed DE materials supplied to them.

The case study is structured under the following headings:

1. Programme offered  
2. Certification provider  
3. Purpose, target learners and staff functions  
4. Programme and materials development  
5. Assessment  
6. Collaboration and partnerships  
7. Communication  
8. Learner support  
9. Abakhwezeli training  
10. Sustainability  
11. Perceptions of researcher  
12. Appendices A to G.

The case study was compiled on the basis of the following data sources:

Review of the following printed documents:

- Record of meeting to discuss Kellogg Research – 14/10/00
- Report on moderation/affirmation process 18-21 September 2000 – Marlene Rousseau
- University of Fort Hare Distance Education Project: Submission for interim Registration of Qualifications – 27 June 2000
- Summary of Fort Hare Accreditation Proposal – 15 May 1998
- Report on a Visit to Fort Hare University’s Distance Education Project – S. Amos & F. Moorat, Open University, UK
- Regional roles and structures – synthesis of contributions made to a Regionalisation Workshop – 10 July 2000
- Distance Education Project: Input to Fort Hare Institutional Plan
- Draft Specifications for Part-time Tutors for Core Course Modules
- Draft curriculum framework documents: 04/17/98, 12/03/98; Draft 3; + several undated versions
- UFHDEP Core Learning Areas Course: Language, Literacy and Communication: Umthamo 1 Communication – Guide for abakhwezeli\(^1\) (revised – Feb ’99)
- Abakhwezeli journal “Description of Teacher-Learners: B. Prim Ed Year 2 – Kokstad-Bizana
- Running Notes Semester 1
- Random samples of feedback from teacher-learners, abakhwezeli and others

\(^1\) Umkhwezeli: the one who tends the fire (pl. abakhwezeli): facilitator/motivator/tutor
• Samples of letters to teacher-learners and abakhwezeli
• Samples of abakhwezeli workshop reports
• Assorted assessment material
• Samples of guides and running notes.
• The following imithamo²

Semester 1:
1. Communication
2. What do we know about learning?
3. Process Skills
4. Classroom Management: Group Work
5. Developing and Using Number Concepts
6. Schools: Organizations or “Disorganizations”?
7. An Introduction to Technology Education
8. The Role of Education

Semester 4:
25. Towards Critical Literacy
26. Powerful Thinking – Powerful Thinkers
27. Finding out more about Science
28. Independent Learning in a ‘Resourceful’ Classroom
29. Developing Mathematical Thinking using Patterns
30. Healing the System: Improving our Schools (2)
31. Differentiated Group Work: Joining and Fastening
32. Lahla Bumba: South Africa’s Curriculum Change in Context.

Interviews and observations:
Observation visit to RH Godlo School, Mdantsane on 18/10/00:
  Observations of classes of and informal interviews with:
  ECD teacher-learners: Ms Makatsi; Mirriam Nombulelo Goci
  G1 teacher-learner: Ms Fali
  G2 teacher-learner: Ms Ndyawe
Clarification discussion with Paula Botya and Namhla Sotuku (ESSOs/abakhwezeli) during RH Godlo visit – 18/10/00
Observation of trialing a Geometry related key activity in a G4 class, by Mthunzi Nxawe for Umthamo 37 – 18/10/00
1 on 1 interviews with academic co-ordinators: Viv Kenyon (Literacy and some Core Education); Alan Kenyon (early maths imithamo, science and technology), Liz Botha (most Core Education Studies); Mthunzi Nxawe (Major Maths writer and Deputy Director) – 18/10/00
Paired interview with Zoliswa Mafanye (Centre Co-ordinator for E. London, Umkhwezeli Stirling E. London, ESSO, materials developer) and Celiwe Ngethu (Regional Co-ordinator Gcuwa-Inyathi Region, Centre Co-ordinator Bisho and Alice, Umkhwezeli, ESSO, materials developer) en route to ESSO presentation in Nqamakwe – 19/10/00
Observation of ESSO presentation at Upper Mgomozi Combined School (G1 to G9) – 19/10/00
Group discussion with Deputy Director and Academic Co-ordinators at All Saints campus – 20/10/00
Focus group interview with 19 teacher-learners – 20/10/00

² Umthamo: mouthful; pl imithamo. Module comprising 40 hours notional learning time.
Observation of a Saturday morning contact session at Stirling Centre, East London – 21/10/00.
Email feedback on first draft of report from Viv Kenyon – 14/12/00
Observation of Abakhwezeli training session at All Saints 16-17/01/01
Individual interviews 17-18/01/01 with the following: Tillie Tshangela (ESSO Retd.), Toto Mdleleni (Regional Co-ordinator EG-Kei), Saks Masakala (Centre Co-ordinator – Maluti), Mike Gcingca (Centre Co-ordinator, Kokstad), Adi Kwelemtini (Interim Administrator and Finance Manager), Nomfanelo Poho (Learner Support Manager made redundant in 2000), Lulama Tinta (Assistant Finance Manager), Ayanda Bokwe (DEP Secretary), Nolundi Ningi (Database Manager), Sithembele Jara (Stores and Distribution Manager).

1. PROGRAMME OFFERED

The programme that forms the basis of this case study is a 4-year contact supported distance education programme leading to the award of a B. Prim Ed by the University of Fort Hare (UFH).

The programme has been developed and is offered by the Distance Education Project (DEP), which is based at the All Saints Campus of UFH in Bisho.

The B. Prim Ed programme comprises 8 semesters.

Each semester comprises two courses presented through eight imithamo (each umthamo is a separately printed booklet of approximately 40 pages) in ‘bite-size’ chunks of approximately 40 hours of notional learning time:

- **Core Education Studies:**
  - Learning About Learning (LAL)
  - Helping Learners Learn (HLL)
  - Schools as Learning Communities (SLC)
  - Learning in the world (LIW)

- **Learning areas:**
  - Literacy
  - Numeracy and Mathematics
  - Natural Sciences
  - Technology.

As noted above, each umthamo comprises a separate booklet, which represents 40 hours of notional learning time. Of this 40 hours, approximately 3 hours is spent in face-to-face discussion on three Saturday mornings and the other 37 hours is spent in individual self-study and classroom application built around a key activity (requiring at least 10 hours to complete: at least a third 33.3% of study programme will be structured around classroom and school-based activities³).

A typical Saturday morning contact session involves discussion of three imithamo:

- one being concluded (e.g. Umthamo 11, Natural Sciences – What’s happening here?)

³ Summary of Fort Hare Accreditation Proposal – 15 May 1998
The abakhwezeli are not supposed to use these sessions to teach the content of the programme. Rather, they play the role of facilitating discussion on the issues arising, as well as the progress on and the implications of the issues explored in the printed material. The abakhwezeli have a key role to play in motivating the teacher-learners in their studies – that is in ‘keeping the fire burning’.

During the course of one year of study, teacher-learners therefore work through 16 separate imithamo and complete 16 classroom- or school-based key activities.

Eight key activities are subjected to self-assessment and peer assessment and are included in teacher-learners’ portfolios; the other eight key activities are also handed in for assessment by the relevant umkhwezeli before being included in learners’ portfolios.

Classroom-based key activities require evidence in the form of examples of learners’ work (as opposed to just teacher-learners’ work, for example) or evidence in the form of completed school policy documents and the documented process of development thereof. Thus the assessment strategy is very much evidence-based and requires self, peer and umkhwezeli review. At the end of each semester, teacher-learners are required to justify their portfolio to their peers and umkhwezeli. This oral justification, together with the portfolio itself, and satisfactory performance on the key activities included throughout the year, a running journal which teacher-learners are required to keep detailing their experiences and insights, active participation in the Saturday morning contact sessions and the evidence that the teacher-learners’ engagement in the programme is impacting positively on the learners in their care, is the basis for a negotiated decision on whether the teacher-learner progresses to the next level of the programme. The portfolio presentation at the end of the year also includes relevant experts from outside of the programme.

In addition to the B. Prim Ed itself, a certificate course is offered which provides an access route into the programme for those who do not have the required prior learning and experience (5 years teaching experience). This course has two components: English for Teachers and Introduction to Tertiary Level. It is scheduled for revision.

2. CERTIFICATION PROVIDER

As noted above, the B. Prim Ed is awarded by the University of Fort Hare. It is a 480 credit programme (of which 240 credits are derived from RPL in terms of the entry requirements) and has an exit level at REQV 14 on the NQF.

Information about the programme can be obtained by contacting the Interim Manager of the B. Prim Ed. (position effective January, 2001 – formerly DEP deputy director, see section 3 below), Mthunzi Nxawe, on 040 639 3082, 082 921 4423 or emailing to Mthunzi@mweb.co.za or disedu@iafrica.com.
3. PURPOSE, TARGET LEARNERS AND STAFF FUNCTIONS

3.1 PROGRAMME PURPOSE

The focus of the UFHDEP B. Prim Ed is as follows:

- providing award-bearing and accredited courses that are commensurate with South Africa’s new curricular thrusts
- addressing the scarcity of teachers trained 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.  

3.2 DESCRIPTION OF TARGET LEARNERS

The target learners are practising primary school teachers with at least five years teaching experience.

There were 974 registered teacher-learners at the end of the third intake in March 2000. The recent intake, in September 2000, took enrolment to 1284. The teacher-learners are mature students working with classes from Grade 0 to Grade 9. 90% of learners on the programme are female.

Teacher-learners with Grade 10 + PTC + 5 years experience are required to complete the certificate course before they can be granted 240 credits RPL for entry to the B. Prim. Ed programme.

Teacher-learners with Grade 12 + PTC or PTD + 5 years experience are assumed to have RPL equivalent to 240 credits and gain direct access to the degree programme. No distinction is made between PTC and PTD as entry qualifications for the degree programme.

The following enrolment cohorts are currently running with the programme:

Enrolment date:
2. January 1999
3. September 1999
4. March 2000

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4 Distance Education Project: Input to Fort Hare Institutional Plan
5 Interview with Nolundi Ningi, Database Manager, 18/01/01
3.3 DESCRIPTION OF EDUCATORS AND OTHER SUPPORT STAFF

The programme involves the following staff as at January 2001:

- Dean of the (new) Faculty of Economics, Development and Commerce (formerly DEP Project Director)
- Interim Manager of B.Prim Ed. (formerly DEP Deputy Director – also main writer for Mathematics)
- Interim Administrator and Financial Manager (and assistant)
- 3 additional Academic Co-ordinators
- 3 Regional Co-ordinators (Eastern and Igcuwa; EG Kei; Northern)
- 8 Centre Co-ordinators (Nyathi; Butterworth; Umtata; East London; Bisho; Alice; Bizana; Lusikisiki; Flagstaff; Mt Frere; Kokstad; Umzimkulu; Maluti; Queenstown; Sterkspruit: some staff co-ordinate more than one centre and/or double up as Regional Co-ordinators)
- ± 75 Abakhwezeli (note: some Abakhwezeli play more than one role)
- ± 11 Educator and School Support Officers (ESSOs)
- Part-time writers
- Materials Distribution personnel
- Database and data capturing manager
- DEP secretary
- Librarian
- IT specialist (volunteer)
- Graphics/newsletter support (VSO placement).

It should be noted that the teacher-learners and their school learners are also seen as important resources in this programme as evidenced by the roles outlined below.

The following diagram, adapted from a paper summarising a discussion on regional roles and structures as well as an interview on 18/01/01 with Adi Kwelemtini (Interim Administrator and Financial Manager) represents the researcher’s attempt to develop an organogram for the DEP B. Prim Ed.

The precise organisation structure, roles and personnel are subject to change in line with the restructuring of the university as a whole as well as changes within the DEP and B. Prim Ed.

The separation of roles indicated in the organogram is not, however, quite as clear cut as the diagram suggests: many participants in the programme play a number of roles simultaneously. For example, the Regional Co-ordinator for the Eastern and Igcuwa – Inyathi region is also Centre Co-ordinator for Bisho and Alice, an ESSO, an umkhwezeli and has been involved in materials development. It is also the policy of the B. prim Ed in 2001 that all academic support staff should play an abakhwezeli role: thus the figure of 75 abakhwezeli includes the 3 regional coordinators, 8 centre

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6 Regional roles and structures – synthesis of contributions made to a Regionalisation Workshop – 10 July 2000

7 Derived from a headcount of 68 participants at the abakhwezeli training workshop on 17-18/01/01 plus 7 absences noted in an interview with Nolundl Ningi on 18/01/01.
coordinators and 11 ESSOs and these numbers should not be read as additional personnel (i.e. **not** 75 + 3 + 8 + 11).

An understanding of the different roles is an important consideration for possible expansion and/or replication of the UFHDEP model.

Accordingly, the researcher’s understanding of these roles is set out below.
Dean: Nhlanganiso Dladla

Interim Manager: Mthunzi Nxawe
Also
Main writer for Mathematics

Central Office

Lead Academic Co-ordinator: Alan Kenyon
Academic Co-ordinators:
Alan Kenyon (Maths, Science and Technology)
Viv Kenyon (Literacy)
Liz Botha (Core Education)

Interim Administrator and Financial Manager

Regional Co-ordinators 3

Centre Co-ordinators 8

Graphics and newsletter

 Librarian

Asst. Financial Manager
Stores and Distribution Manager
Database Manager
Administration Systems and Logistics Manager
Volunteer IT specialist

Abakhwezeli ±75

Teacher-Learner Representative Council

Teacher-Learners

ESSOs ±11
Director — Dean

The Director provided strategic vision and direction and a direct link with other University structures. A November 1999 report by researchers from the Open University UK pointed to the fact that the Director’s secondment to the Acting Administration at Fort Hare University was impacting negatively on the provision of strong leadership and maintenance of the common vision as the project sought to grow to meet rising demand. The impression gained by the researcher during a visit in October 2000, however, was that the Deputy Director and Academic Co-ordinators were working as a team to build and sustain the common vision. During the *abakhwezeli* training workshop on 16-17 January, 2001, it was announced that the Director would be leaving the DEP to become the Dean of the new Faculty of Economics, Development and Commerce and would therefore no longer play a direct role in running the DEP. However, the DEP would in time be absorbed into this faculty.

Deputy-Director — Interim Manager

The Deputy-Director was originally seen as the link between the Regional Co-ordinators and Academic Co-ordinators and the Director. The DD should have been playing a key role in quality assurance but did not get into the field sufficiently regularly to be able to monitor performance and delivery due to the constraints of combining two different roles (Deputy Director and major writer for Maths) and, to some extent, filling in for the Director. In January 2001, this role was changed to interim manager of the B. Prim Ed, with other DEP activities to be managed elsewhere. The interim manager has primary responsibility for the future vision of the project. Given the increased responsibility, it seems likely that the current incumbent will have even less time to monitor the quality of delivery in the field and some other arrangement will need to be made.

Academic Co-ordinators

Academic Co-ordinators are responsible for developing the evolving curriculum framework, developing (in most cases actually writing) the materials, piloting draft materials, developing assessment criteria and processes and inducting, supporting and monitoring *abakhwezeli*. Due to the fact that there is still considerable materials development taking place, the latter two roles are currently somewhat limited.

Administrator and financial manager

As the title implies, this role is concerned with the efficient administration and financial management of the project. The person who was officially appointed to this position was seconded to the central administration of the university and for the past two years a teacher who was contracted for field support and research has acted in an

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8 Report on a Visit to Fort Hare University’s Distance Education Project – S. Amos & F. Moorat, Open University, UK
9 Interview with Mthunzi Nxawe (Maths writer and Deputy Director) – 18/10/00
10 Presentation by Nhlanganiso Dladla at abakhwezeli training workshop 17/01/01.
11 1 on 1 interviews with DD and ACs 18/10/00 and group discussion and clarification 20/10/00.
interim capacity. This person resigned with effect from December 2000, but has been persuaded to continue to fill the role till a replacement can be found.12

[It is the researcher’s perception that this person could be retained by the project if he were freed from some of the routine administration work in order to pursue the more education-focussed tasks for which he was originally engaged.]

Administration Systems and Logistics Manager
This role is concerned with ensuring the smooth running of the project, by pre-empting or dealing with problems such as power failure (which occurred during the researcher’s visit). This person also provides a secretarial/ personal assistant service to the senior management of the project, organises meetings, takes phone calls and assistants teacher-learners making enquiries.13

Regional co-ordinators
The need for Regional Co-ordinators became apparent in March 2000 and the positions were created in May 2000. The Regional Coordinators have replaced the Learner Support Manager, who was made redundant during 2000 (but who continues to occupy an office and draw a salary pending redeployment with UFH)14. The Regional Co-ordinator’s role fulfills three broad functions:
- academic support to abakhwezeli and teacher-learners
- administrative functions to do with recording keeping, reporting on a monthly basis at a central progress meeting, recruitment and induction, and developing plans of action, as well as negotiating catch-up sessions for any groups falling behind others for whatever reason; and
- logistical support to ensure that materials are delivered to the right places at the right times for the right cohorts and that the centres have the abakhwezeli they need to support the teacher-learners enrolled15.

The Regional Co-ordinator is the first line of communication for Centre Co-ordinators encountering problems and plays a monitoring role in this regard.

It is envisaged that Regions will need to become increasingly autonomous as the programme grows.

Currently, for example, Regional Co-ordinators communicate staffing needs to central office who advertise for and induct new staff members. This is a role that would increasingly be played by the Regional Co-ordinator.

In a Regionalisation workshop held in July 2000, the role of the Regional Co-ordinator was outlined as follows:

**Key areas of responsibility:**
- General co-ordination, management and trouble-shooting in the region

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12 Interview with Adi Kwelemtini, Interim Administrator and Financial Manager, 18/01/01.
13 Interview with Ayanda Bokwe, 18/01/01.
14 Interview with Nomfanelo Poho, 18/01/01.
15 Paired interview with Zoliswa Mafanye (Centre Co-ordinator for E. London, Umkhwezeli Stirling E. London, ESSO, materials developer) and Celiwe Ngethu (Regional Co-ordinator Gcuwa-Inyathi Region, Centre Co-ordinator Bisho and Alice, Umkhwezeli, ESSO, materials developer) en route to ESSO presentation in Nqamakwe – 19/10/00
- Evolve own working system
- Ensure availability of Regional Plan
- Supervise smooth running of regional activities and functioning of centres
- Facilitate communication in the system
- Liaise with CCs, ESSOs in the region
- Visit centres, casually or by invitation
- Capacity building for regional staff
- Hold regional meetings monthly (agenda in advance)
- See to the writing of the regional report (monthly)
- Oversee sharing of resources e.g., cars and offices
- Inform regional personnel about central meetings – agenda in advance

**Important areas of responsibility:**
- See to it that whatever is communicated should be implemented
- Recruitment and advocacy – must be part of a recruitment plan and action

**Less important areas of responsibility/functions:**
- Establish positive working relationships by ensuring that every DEP member is involved in operations and decision-making
- Collective accountability through the Regional Co-ordinator to the DEP family (represented at monthly central meetings)
- Networking DOE, Enrichment Programmes, NGOs (maintain relations)
- Some school visits and khwezela-ing.

The exact status of this job description is not clear as the document from which it is drawn appears to be a set of notes rather than a policy statement. Development of these guidelines represents an advance on a recommendation in the Open University report cited earlier and could be used to inform the development of job descriptions in other DE interventions planning to go to scale. The UFHDEP experience would seem to indicate the need to decentralise decision-making and support structures.

Anecdotal reports from within the UFHDEP suggest that more informal, non-hierarchical structures may be more effective in delivery and these perceptions might militate against further development and formalisation of job descriptions and lines of accountability.

On the other hand, some regions may be able to deliver well because the people involved know each other and have a history together. Critical success factors for successful delegation of responsibility to decentralised regions warrants further research.

**Centre Co-ordinators**
Centre Co-ordinators play a similar role to Regional Coordinators but on a smaller scale. Key aspects of the role include:
- Ensuring that the right imithamo and abakhwezeli are in place at the right time

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16 Record of meeting to discuss Kellogg Research – 14/10/00
17 Paired interview with Zoliswa Mafanye (Centre Co-ordinator for E. London, Umkhwezeli Stirling E. London, ESSO, materials developer) and Celiwe Ngethu (Regional Co-ordinator Gcuwa-Inyathi Region, Centre Co-ordinator Bisho and Alice, Umkhwezeli, ESSO, materials developer) en route to ESSO presentation in Ncqamakwe – 19/10/00
• Compiling a monthly report of activities for the Regional Co-ordinator
• Checking that *abakhwezeli* mark hand-in key activities on time, fairly and accurately
• Ad hoc checking of non-hand-in key activities as well as *abakhwezeli* journals. Monitoring of the work performance of *abakhwezeli* is intensive for new recruits but becomes more ad hoc as they grow in experience\(^\text{18}\).

The Regional Roles and Structures document referred to earlier, outlines the work of the centre co-ordinator as follows:

**Key areas of responsibility:**
- Management and administration of centres
- Liaise with Materials Distribution Personnel to see to it that the necessary materials reach centres in time for face-to-face sessions
- Make sure accommodation is available
- Office management
- Record/keeping maintenance
- Hold monthly centre meetings
- Organise for moderation

**Very important areas of responsibility:**
- Advocacy, marketing and recruitment and being accountable
- Making follow up
- Orientation and registration
- Fees and payments

**Important areas of responsibility:**
- Support to teacher-learners
- Follow up on drop-outs

**Less important areas of responsibility:**
- Reading *imithamo*
- Monitoring face-to-face sessions
- Monitoring written assignments
- Monitoring cumulative assessments
- Capacity building of *abakhwezeli*
- Attending capacity building workshops for own self-development
- Being available for school visits
- Helping to earmark schools for the trialling of *imithamo*
- Networking with DOE officers and NGOs
- Linking between centre and region; reporting to region.

In an email response (14/12/00) to the first draft of this report, Viv Kenyon expressed concern over the relative weighting between academic/professional activities and technical/clerical/administrative activities in the centre coordinators’ role. The above comments and job descriptions seem to emphasise the latter over the former. Subsequent formal and informal discussion with the centre coordinators interviewed in October 2000 as well as centre coordinators interviewed for the first time in January 2001, tended to support this emphasis on the administrative over the academic. This is perhaps an issue that should be followed up on in a monthly management meeting.

\(^{18}\) See footnote 11
ESSOs
ESSOs have been seconded by the Department of Education from closed Colleges of Education. ESSOs are expected to spend 60% of their time on DOE work and 40% of their time on UFHDEP work. In practice, the roles are blurred as giving support to individual teacher-learners usually requires whole school development work, and this in turn offers opportunities for further recruitment into the UFHDEP programme (see Appendix C for an account of an ESSO visit).

Visits to schools by ESSOs are initiated and motivated by UFHDEP teacher-learners as well as other teachers who request a visit via the Education Development Officers (EDOs) of the their local circuit or district office. Typical areas in which ESSOs are asked to provide support are in how to encourage parental and community involvement (the topic of an umthamo), how to implement OBE and how to teach technology. In the ESSO visit observed by the researcher, support was requested regarding parental involvement, OBE, management skills, developing learning programmes, Norms and Standards and teacher appraisal. The initial workshop tends to involve information sharing, with subsequent follow up workshops involving more activity and sometimes classroom teaching demonstrations.

In general, ESSOs visit schools in teams, with each team member taking responsibility for leading a discussion around a particular topic. The ESSO approach is summarised in the following quotations from interviews conducted by the researcher:

- *Support cannot be done in an office*
- *We were once there … we are now change agents*
- *We are not solving … make them solve their problems … give them ideas.*

The Regional Roles and Structures discussion document outlines the work of ESSOs as follows:

**Key areas of responsibility:**

- **Supporting DEP teacher learners, which involves:**
  - visiting teacher-learners at their schools (1st phase)
  - discussing need to re-visit
  - negotiating relations at school
  - arranging clinics for teacher-learners to attend
  - meeting teacher-learners at risk at schools
  - offering follow-up support
  - negotiating aid programmes/ advising
  - establishing good working relations among ESSOs, RCs, CCs and teacher-learner drop outs/at risk/high success
  - counselling

- **Supporting non-DEP schools, which involves:**
  - visiting schools
  - discussing whether they need support

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19 Paired interview with Zoliswa Mafanye (Centre Co-ordinator for E. London, Umkhwezeli Stirling E. London, ESSO, materials developer) and Celiwe Ngethu (Regional Co-ordinator Gcuwa-Inyathi Region, Centre Co-ordinator Bisho and Alice, Umkhwezeli, ESSO, materials developer) en route to ESSO presentation in Nqamakwe – 19/10/00

Observation of ESSO presentation at Upper Mgomozi Combined School (G1 to G9) – 19/10/00
- making appointments
- planning to aid/support school
- rendering support

**Important areas of responsibility:**
- Working with DoE officials and districts – sharing itinerary with them
- Facilitating curriculum training and capacity building workshops for teachers

**Less important areas of responsibility:**
- Linking with NGOs, DoE, Unions
- Attending workshops for own capacity building
- Writing monthly reports
- Being involved in but not accountable for advocacy and recruitment
- Being involved in activities within DEP, which involves:
  - attending face-to-face sessions – *ukukhwezela*
  - moderating portfolio presentations
  - attending *abakhwezeli* workshops/ capacity-building workshops
  - keeping records
  - attending meetings
  - co-ordinating/ contributing to newsletter
  - attending orientation workshops
  - budgeting and bursaries
  - marketing and recruitment
  - cleaning offices
  - interacting with regional personnel (RC, CC, Abak., TLs)
  - moderating portfolio presentations
  - attending *abakhwezeli* workshops/ capacity-building workshops
  - keeping records
  - attending meetings
  - co-ordinating/ contributing to newsletter
  - attending orientation workshops
  - budgeting and bursaries
  - marketing and recruitment
  - cleaning offices
- Interacting with regional personnel:
  - attending regional meetings
  - discussing teacher-learner problems with *abakhwezeli*, RC, CC, TLR
  - planning (developing workplans)
  - applying for use of vehicle
- Engaging in think tanks e.g. for writing *imithamo*
- Assisting to earmark schools for trialling of *imithamo*; assisting with trialling.

**Abakhwezeli**

As noted above, *abakhwezeli* are usually involved in other roles as well, which might include being an ESSO, as well as a centre and/or regional co-ordinator. In a document titled *Draft Specifications for Part-time Tutors for Core Course Modules* (1997/8), the point is made that *abakhwezeli* need to be “Able to explain clearly what is required (NOT TO TEACH, but to support learners!” This role is further elaborated on in *Umthamo 1* (pp. 2 – 3) where *The story of umthamo and umkwezeli* is set out. The inadequacies of terms like tutor and mentor are related and hence the
rationale for the choice of umkhwezeli in the sense of someone whose “job was to keep the fire burning just right so that the food in the pot would cook well”.

The majority of abakhwezeli are teachers or principals from the local area. Some are, or were, college lecturers and some of these were, during 2000, designated as ESSOs in a secondment arrangement with the Department of education, which is subject to ongoing negotiation. All abakhwezeli (whether or not they play other roles in the project) receive a stipend of R 400 per Saturday contact session of three hours. In practice, abakhwezeli work considerably more time on the B. Prim Ed work than they are paid for as the stipend does not cover time spent in preparation, in additional support, in feedback on assignments, on practice portfolio sessions etc. There are clearly other motivating factors at play (as noted in the report on the observation of the training session in Appendix F). Many abakhwezeli spoken to informally during breaks indicated that they were hoping to receive some form of formal recognition for their involvement. Some spoke about being awarded the B. Prim Ed they are tutoring. Tillie Tshangela (umkhwezeli East London) suggested that UFH offer abakhwezeli the opportunity to study the UNISA/Sached Certificate for Distance Education practitioners, which she has found particularly useful in aiding understanding of the needs of distance learners. Alan Kenyon indicated the possibility of using the abakhwezeli experience as the basis of a University Diploma as a teacher trainer. A combination of these initiatives could be useful in further motivating abakhwezeli to stay with the programme for the full eight semesters.

The Regional Roles and Structures discussion document outlines the work of abakhwezeli as follows:

Key areas of responsibility:
- Face-to-face facilitation:
  - know and support teacher-learners/ render first-phase assistance to teacher-learners
  - know imithamo
  - mark assignments
  - maintain teacher-learner records
  - co-ordinate assessment
  - service relations between teacher-learners and ESSOs/ Centre Co-ordinators
- Optional school visits
- Writing a group monthly report
- Capacity-building (attending quarterly workshops).

Teacher-learner representative

The Regional Roles and Structures discussion document outlines the role of a teacher-learner representative as follows:

Key areas of responsibility:
- Represent concerns of teacher-learners to Centre, Region, Central Office
  - Link between centre and teacher-learners
  - Service relations between centre and other regions

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20 Email, Viv Kenyon, 14/12/00
21 Points repeatedly made during the course of the abakhwezeli training workshop at All Saints on 16-17/01/01.
- Link between central office and the centre
- Capacity-building.

Abakhwezeli are required to attend quarterly centralised training sessions (see Section 9 and Appendix F), conducted by the DEP’s academic co-ordinators, whilst regional and centre co-ordinators attend centralised management meetings on a monthly basis.

The impression gained from interviews with staff members is that the DEP has grown organically and that channels of communication are fairly open, as indicated by the two-way arrows in the diagram above. Although staff members talked to seem to have a fairly clear understanding of their respective roles, line management functions do not seem to have been finalised. The smooth (or otherwise) running of the programme appears to be more dependent on an ‘extended family’ kind of management style based on goodwill and a sense of common purpose than upon formal policies and procedures. Although staff members at different levels are required to keep ongoing journals of their activities and to submit monthly reports, the exact status of these in terms of outlining responsibility and accountability is not clear from interactions with the DEP to date.

In the absence of such formal management policies and procedures, it is difficult for the DEP to engage effectively with staff that may be unwilling or unable to perform as expected. This has become an issue with respect to the management of learner support, for example.22

4. PROGRAMME AND MATERIALS DEVELOPMENT

The DEP is still in the process of developing its curriculum within what could be described as an “evolving framework”23.

The UFH began to consider moving into DE provision in 1995 and in June 1995 collaborated in a feasibility study with the Eastern Cape Department of Education as well as the University of South Australia. This feasibility study yielded expressions of interest from over 5000 teachers.24 Further work with the University of South Australia yielded a base line curriculum proposal but this did not entirely resonate with COTEP requirements at the time.25

22 Report on a Visit to Fort Hare University’s Distance Education Project – S. Amos & F. Moorat, Open University, UK.
23 Draft curriculum framework documents: 04/17/98; 12/03/98; Draft 3; + several undated versions
24 Summary of Fort Hare Accreditation Proposal – 15 May 1998
25 Interview with Alan Kenyon (lead academic co-ordinator, early maths imithamo, science and technology – 18/10/00
The UFH nevertheless was committed to moving into DE provision and decided to pilot a certificate programme for under-qualified teachers, which would allow them to be given 240 credits RPL in order to enter a B. Prim. Ed programme. Approximately 100 learners were enrolled on this course in mid-1997 using materials developed for the DEP externally.

Alan and Viv Kenyon, who were at the time working for the Primary Science Project and heavily involved in materials development, were approached to offer support, on developing materials for the proposed DE version of the B. Prim. Ed, to UFH on a part-time basis. Representatives form the Open University UK were also involved in some of these early discussions.

In January 1998, UFH advertised full-time academic posts to lead the development of materials for the DEP and Alan and Viv Kenyon were approached to fill these posts. They began work with the project in March 1998. Alan Kenyon (ibid) described the programme development process in these early days in the following way:

- **Invent things as you go**
- **Solve things as they immediately hit you.**

He subsequently qualified this by saying that their work was informed by helpful advice provided by John Gultig (SAIDE/University of Natal) and the Open University of the UK. Alan summarised the OU advice as follows:

> 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.

Acting on this advice, Alan and Viv adopted an approach of starting with a practical key activity, developing supporting activities for the key activities and then drawing in content and theory that would suit the purpose. From the beginning, the idea was to integrate learning across two key courses (Core Education Studies and Core Learning Areas) and to use continuous assessment practices.

The first three *imithamo* were developed in this way. In developing these early materials, it soon became clear that employing external writers was not ideal. It was difficult to manage and many people, whilst being experts in their fields, lacked the practical primary school experience to be able to design suitable key activities. The ideal of integration as opposed to presenting separate courses was aided by the fact that Alan and Viv Kenyon are married and tend to discuss a lot of their work together outside of normal office hours. When Liz Botha joined the team to take the lead in the development of materials for the Core Education Studies *imithamo*, a slightly revised process emerged and has largely been followed since then. This process involves planning sessions involving the academic co-ordinators, and others, charting the development for the next semester whilst completing work and delivering for the current semester. In these planning sessions, possible explicit links between *imithamo* are identified. (For the fifth semester on, a new icon has been developed to

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26 Interview with Viv Kenyon (LLC co-ordinator) – 18/10/00
27 Interviews with Liz Botha (CESC co-ordinator) and Mhunzi Nxawe (DD & Maths co-ordinator) – 18/10/00
flag these explicit cross references.) The development work is then delegated. Whilst the Learning Areas Course materials tend to be developed mostly internally, the Core Education Studies Course materials development still involves a lot of external consultation. In each case, however, the internal academic co-ordinator takes the lead in designing and trialing the core activities.

In each semester, teacher-learners work through an umthamo in each of the eight strands of the programme (four CESC strands and four LAC strands). Thus in each semester, the teacher-learners return to issues at increasing levels of complexity, in the form of a Bruner informed spiral curriculum.

From the start of the programme, it was envisaged that the teacher-learners would work through 64 imithamo in this way. However, a visit from representatives of the University of South Australia at the end of 1999 caused a possible re-think on this. The Australians suggested that instead of introducing more information, the last part of the programme should involve more reflection and revisiting of what has gone before. It therefore seems likely that the fourth year of the programme, will consist of only eight imithamo (instead of sixteen) but a considerable amount of critical self-reflection on what has been learned on the programme.

Viv Kenyon (ibid), describes the overall programme in terms of a four step process:

- 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.

Alan Kenyon (ibid) largely agrees with this progression but sees Year Three as calling upon teacher-learners to influence others in creating an effective learning environment.

Alan believes that the development process and materials design reflect the learning process well and does not foresee the need for extensive revision. However, Viv Kenyon believes it might be necessary to go back and improve activity instructions in some of the earlier imithamo. Liz Botha believes that it might be useful to revisit the earlier imithamo and strengthen integrating links. She is also concerned at the possibility that the ‘Education in the World’ strand, coming as it does always at the end of a semester, might not enjoy the attention that it deserves. Mthunzi Nxawwe stresses the need to ‘get away from the particular’ and involve teacher-learners in a process of making, modifying, testing and refuting conjectures, using unfamiliar contexts to raise the need to critically question concepts.

5. ASSESSMENT

The development of the assessment strategy for the B. Prim. Ed programme was informed by the following imperatives:
• Avoiding the negative backwash from terminal examinations that characterised the traditional South African approach.
• The need to go beyond merely paying lip service to continuous assessment.
• The need for an assessment process that would support and build the learning process instead of just giving unexplained marks.
• The need for a monitoring, appraisal, and validation process that would be rigorous and accountable but also manageable and realistic.28

The programme uses a continuous assessment progress to build towards the development of an individual “professional quality index” (PQI).

The PQI is determined from a combination of performance in four key areas:

• **Participation** (listening, sharing, supporting and democratic group work).
  At the end of each of the 60 hours of face-to-face sessions, teacher-learners have to assess themselves in terms of this criterion, and are also assessed by a peer and their *umkhwezeli*, using the following five-point scale:

<table>
<thead>
<tr>
<th>Not adequate – doesn’t meet requirements</th>
<th>Adequate – just meets requirements</th>
<th>Good – meets requirements well</th>
<th>Very Good – more than meets requirements</th>
<th>Outstanding – goes beyond requirements – quality work</th>
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<tr>
<td>Weak</td>
<td>Okay</td>
<td>Good</td>
<td>Very Good</td>
<td>Excellent</td>
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The overall participation assessment is therefore derived from 60 separate assessments from the perspectives of self, peer and *umkhwezeli*.

• **Oral presentation** (sense, effectiveness of communication, clarity, contributions)
  At the end of the first semester of the year, teacher-learners give an oral account of what they have learned during the year, using evidence of work that has happened in their classrooms, as well as the assignments they have completed. These oral presentations are assessed, using the above scale, by self, peers and *umkhwezeli*. At the end of the second semester, teacher-learners are required to “defend” their portfolio to a panel comprising peers, *umkhwezeli* and others e.g. academic co-ordinators as well as external moderators.

• **Eight written reflective reports/research assignments**
  As noted previously, teacher-learners complete 16 practical classroom- or school-based assignments during the course of the year. Eight of these, indicated in the materials together with assessment criteria, are handed in for assessment by the relevant *umkhwezeli*, again using the five-point scale supported by formative

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feedback. (The other eight are included in the teacher-learner’s portfolio.) Alan Kenyon sees these assignments as a key part of the programme as they involve learners in classroom- and school-based research that ties in directly with the overall purpose of the programme, that is, to make a positive difference in classrooms and schools. He notes that it is a positive innovation for learners to be engaged in such research in an undergraduate programme.  

- **Portfolio Presentation (evidence of professional growth and development)**

Teacher-learners’ portfolios include the work of full year. The teacher-learners are provided with a concertina file in which to file their accumulated work at the beginning of the programme. At the end of each semester, teacher-learners prepare a display of their work using their own selection from their concertina files. The display should provide evidence of:

- activities done
- what the teacher-learner has learned
- progress, as evidence of change
- process, as evidence of change.

Teacher-learners have to be ready to defend their display to a small group of their peers, as well as umkhwezeli and moderators, by being ready to answer questions such as:

- Why have you chosen this piece of work?
- What do you want us to look at/ notice in this piece of work?
- What have you learned from the experience of carrying out this activity?
- If you were to try this activity again, what would you do differently and why?

In addition to these four key components, the final PQI assessment for the year can be influenced for borderline cases by poor attendance (which affects the PQI negatively) and the teacher-learners’ journal, which can affect the PQI positively.

Viv Kenyon stresses the importance of journal writing in the programme as a whole. She believes that “the more the teacher-learners write, the better they get at expressing thoughts and ideas in writing” (see footnote 22). Teacher-learners receive a counter book at the beginning of the programme and are encouraged to write in it and to share their writing, from the beginning of the process. Abakhwezeli are required to model the process by also keeping journals and sharing them with their teacher-learners. In the journals, the emphasis is on making meaning rather than on grammatical accuracy.

The above assessment strategies are combined to form an individual PQI as illustrated below:

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29 Interview with Alan Kenyon (lead academic co-ordinator, early maths imithamo, science and technology – 18/10/00

30 Evolving a Policy and Procedure for Assessment, May 1999

31 Interview with Viv Kenyon (LLC co-ordinator) – 18/10/00
PERCEPTIONS ON THE ASSESSMENT STRATEGY

A learner’s perspective

When we began our face-to-face session for the first time, we were introduced to self and peer types of assessment. We all found it hard to believe that our own colleague could assess you, let alone yourself. Our abakhwezeli took their time to convince us that this type of assessment was not only fair and valid, but also more reliable.

First, it nullifies favouritism and victimization, as many people are involved. Second, the assessor will have to state the reason why s/he is awarding that particular assessment. This is very helpful in making improvements as teacher and a learner. At first, we were afraid to criticize each other, not knowing that criticism can be positive and can lead to increased success and better achievement … We have found that self and peer assessment is meaningful, because it is a strategy that can help one improve one’s own work.

(Reference in footnote 20)

A moderator’s perspective

A year ago many of the teacher-learners displayed portfolios that provided evidence of their work: of the learning resources they had generated for each imithamo. In almost all centres this year teachers are now displaying rich samples of their learners’ work … Teachers have made remarkable shifts in the quality and quantity of writing that is now being generated in the journals … It would be important to point out and challenge the teacher-learners: their children would make the same shifts if given similar opportunities to write frequently … I was really excited by the accounts of teacher-learners who are beginning to participate and sometimes initiate change within a context of whole school development …
There are differences across centres, an important one being the ‘learning culture’ that … is created by each abakwenzeli …
I was struck by how the physical nature of a venue often seems to affect the standard of the portfolio presentations …

This course is an exceptional one, that is shifting tired, old paradigms to one where we can dream, think, engage in meaningful learning and shift the understanding of our potential as human beings, so that we become reflective and creative agents of change …

Evaluators’ perspectives

… A wonderful experience to see how the project had impacted on teacher/learners and their classroom practice half way through the course …

For them I think having international external examiners provided some credibility to the program. It was mentioned on many occasions that there had been some concerns about not including examinations as part of the assessment and questions asked about whether this was a “real” university course …
I wonder how the moderation will be managed when the numbers of students are increased … I see the need to critically look at how to streamline the affirmation process …

We believe that the B. Prim. Ed is more than a means of gaining a qualification. It aims to change teachers’ practice in the classroom so that their pupils achieve more in terms of learning, and develop more positive attitudes to education. In South Africa the Project appears to be unique, not only in its approach to teacher education, but also in its use of an evidence-based approach to assessment. We conclude that the Project is a very important development in teacher education in South Africa …

The Teacher Learners we spoke to reported that, while these ways of working are new and sometimes challenging, they found them to be very useful and effective in improving their own teaching. The Teacher Learners told us that the course is having a very positive effect on their practice in school. They report that the course is motivating them as teachers, as well as having a very positive effect on their pupils’ motivation and learning. All the Teacher Learners we met were very positive about the course. Several told us it was what they had “been waiting for” because they are required to integrate theory with their practice in the classroom …

Many of the recommendations put forward suggest a more ‘managed’ approach to staffing, organisation and management systems. It could be argued that maintaining morale might be more difficult within a more

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33 Kathy Paige, University of South Australia, Evaluation/feedback – 25/09/00. Liz Botha, in my interview with her on 18/10/00, also expressed concern that with the growth of the programme, the monitoring of the journals and reports of abakwenzeli seemed to have fallen away with possible consequences for the ongoing quality of the programme.
structured and managed framework. However, due to the current phase of development and growth that the Project is in, we think that more emphasis should be placed on this rational approach to management than on an approach based on staff autonomy.\textsuperscript{34}

6. COLLABORATION AND PARTNERSHIPS

As noted previously, the vast majority of field support staff on this programme are seconded from the Eastern Cape Department of Education on a 60\% DOE, 40\% UFHDEP basis. It was not clear at the time of visiting, whether this arrangement could be sustained in the long term. Currently, the arrangement is inequitable, as staff have been seconded with the remuneration package they received whilst still working at the various Colleges of Education – thus it is possible to see two members of staff performing the same job functions with one receiving the equivalent of a Principal’s package and his/her colleague receiving the package of a junior lecturer.\textsuperscript{35}

Some concern about long-term prospects was voiced by the ESSOs the researcher travelled with on 20/10/00. Apparently, a meeting to discuss these issues was scheduled for the following week.

It is also noted that the UFHDEP maintains relations with both the University of South Australia and the Open University UK who play both an external evaluation and support role. Several UFHDEP members have been involved in exchange visits with these two institutions.

A variety of schools, colleges, teacher centres and government offices are used as bases for contact sessions. Currently, it is not clear whether these arrangements are based on formal contracts or simply goodwill.

7. COMMUNICATION

The Open University Report referred to earlier, identifies communication strategies as one of the weak links in the DEP programme as it has expanded. Subsequent to the OU Report, Regional Co-ordinators have been appointed, as explained earlier, and each region has been supplied with three PCs. At the time of writing, the PCs were not up and running as no decisions had been made about where they should be located – given that there are no Regional Offices as such: the UFHDEP programme makes use of the facilities of other institutions for its face-to-face sessions.

Moreover, a common management information system and database was still being compiled.

The finalisation of a common management information system needs priority attention. Given the fact that UFHDEP does not have physical facilities of its own, and that its staff spent large amounts of time travelling, it would seem sensible to load

\textsuperscript{34} Report on a Visit to Fort Hare University’s Distance Education Project [end 1999] – S. Amos & F. Moorat, Open University, UK

\textsuperscript{35} Group discussion with academic co-ordinators, 20/10/00.
the MIS on laptop PCs that have internal modems. This would allow co-ordinators to work from a variety of locations and to communicate by email, via telephone lines where these exist or via WAP-enabled cell phones where terrestrial lines do not exist.

Also, as noted in the final paragraph quoted from the OU report on p. 18, there is probably a need to tighten management and communication lines in general in order to ensure that teacher-learners receive a similar quality service wherever they happen to be based.

8. LEARNER SUPPORT

A review of the literature on learner support within a distance education environment\textsuperscript{36} indicates that learner support issues can be divided into three key areas: that is, learner support

- related to learning and teaching processes/needs
- related to access and information processes/needs
- related to social and personal needs.

In their involvement with the UFHDEP programme, teacher-learners have access to the following kinds of support:

- face-to-face contact sessions for at least three hours at a time on 20 Saturday mornings during the course of the year (see Appendix E for an observation report on a face-to-face session)
- formative oral and written feedback from peers and abakhwezeli (see Section 5, p.15)
- the option of school-based support from ESSOs (see Appendix C for a report on an ESSO support visit).

During the course of an observation of a face-to-face session and a school visit by ESSOs, the researcher witnessed evidence of support related to all of these needs.

In general, learners seem quite happy with the amount of support they receive (see Appendices A and D) although the following suggestions were made for possible improvement of the programme:

- Create an opportunity to engage with writers of imithamo so that writers can explain exactly the purpose they had in mind (majority support for this)

Widespread, but not unanimous, support for the following:

- Offer more support in schools e.g. principals not always on board, difficult to involve parents (as required by one umthamo)
- More curriculum support (some TLs are teaching in schools that still follow the old curriculum which makes it difficult to fit in the activities required by the course. One learner pointed out, however, that the programme is designed to question the old syllabus … )
- Streamline the school support – principals are not always willing to approach EDOs when TLs request ESSO visits
- Help with getting bursaries
- Give formal recognition in the form of credits for completion of each semester

• Provide cameras and tape recorders for imithamo that require use of these
• Provide additional reading materials
• Include computer studies.

As noted in the discussion on assessment in Section E above, the quality of service delivery seems largely dependent on the personality of the particular umkhwezeli involved. It is therefore important to ensure that in addition to the quarterly training sessions, a rigorous monitoring system is established. In this regard, note should be taken of Mthunzi Nxawe’s concern that he does not get into the field often enough to monitor the quality of delivery, and Liz Botha’s concern (Footnote 25, p. 18) about the decline in the extent of monitoring of abakhwezeli journals and assignment feedback.

9. PERCEPTIONS OF RESEARCHER

Perhaps the most striking aspect of the UFHDEP programme from the perspective of the researcher, was the positive energy encountered. At a time when educational debate seems to be restricted to deficit concerns and budgetary considerations rather than meaningful debate on curriculum learning and teaching issues, a visit to the UFHDEP was like a breath of fresh air.

In the intensive four days I spent in the Eastern Cape, I constantly encountered teacher-learners and UFHDEP staff who were passionate about the work they were doing and willing to make extra sacrifices to make a difference.

My visits to classrooms of teacher-learners filled me with new hope for the future of education. My only concern is what will happen to the learners I saw when they move on to classrooms whose teachers are not so motivated and informed at those I spoke to on my visit.

I believe that the UFHDEP programme offers an encouraging model for effective in-service teacher development.

At the same time, the problems that are beginning to emerge as the project goes to scale will provide useful lessons of experience for other distance education providers in general and for SAIDE’s Kellogg-funded research into provision of quality effective DE in rural areas in particular.

What emerges from this preliminary research in this regard are the following points:
• confirmation of the probable need for partnerships with government if a DE programme is to go to scale
• confirmation of the importance of recruiting and supporting committed people with an understanding of community needs
• confirmation of the fact that people are willing to make enormous personal sacrifices if the learning opportunity offers a meaningful and positive difference to their lives
• confirmation of the importance of follow-up support between face-to-face contact sessions
• confirmation that continuous assessment practices involving self-, peer- and other-involvement is a viable alternative to content driven examinations
• confirmation of the importance of involving support staff who speak local languages
• confirmation of the importance of mobility of support staff
• confirmation of the need for regular training, support and monitoring
• confirmation of team-based approaches to curriculum and materials development as well as management
• confirmation of the need for a balance between centralised and regionalized management and support processes
• confirmation that good learning materials are at the heart of effective DE provision
• confirmation of the need for management and administrative systems that are flexible, responsive and designed to be taken to scale
• confirmation of the central importance of clear lines of communication and regular use thereof.
Appendix A

OBSERVATION OF CLASSROOMS OF AND INFORMAL INTERVIEWS WITH TEACHER-LEARNERS AT RH GODLO SCHOOL, MDANTSANE, 18/10/00

MS MAKATESI

Ms Makatesi is a 2nd year teacher-learner and teaches an ECD class. There were 26 learners in her classroom of approximately 20 m² at the time of the observation. The learners were working in four groups on four different activities (using paint, using crayons, using plasticine and cutting pictures from magazines) based on the topic of ‘flowers’. Ms Makatesi said that later the learners would be planting some actual flowers. In addition to the teacher, a parent was also assisting learners with the various tasks.

The children all had a circle of yellow paper stuck to their foreheads to distinguish one group from another as they rotate through the four classrooms arranged around a quadrangle at one end of the school. (The ECD centre was built using OSF funds but there is concern that by the end of the year, OSF will no longer be making funds available so that teachers will no longer be paid. There has been no progress regarding the DOE assuming responsibility for the ECD centre.)

The classroom was well-lit and well-ventilated with a sliding door opening onto the small open paved quadrangle outside.

The classroom walls, as well as some tables along the walls and in the corners, were used to display learner work.

Ms Makatesi identified the following as the most important things she had learned on the B. Prim. Ed. Programme to date:
- Importance of learner activity
- Involvement of parents (a parent assists with each class every day on a rotating basis)
- Seeing learners and their families as sources of learning resources e.g. waste materials that can be used for art, donations of time, donations of money (e.g. to buy paint)
- Importance of team planning regarding learning and teaching, problem-solving, progress and success of learners, home visits etc..

Ms Makatesi said she particularly liked the classroom-based activities that had been built into the DEP materials.

MIRRIAM NOMBULELO-GOCI

Ms Nombulelo-Goci is also a 2nd year teacher-learner and an ECD teacher.
Her group (with green spots) were engaged in activities linked to mathematics and manipulation. These learners were engaged in tasks such as matching shapes, building with Lego, simple puzzles and threading.

Ms Nombulelo-Goci said that the learners in the ECD centre were split into four groups and rotated between classrooms and activities every 30 – 40 minutes. The other three groups focused on basic literacy skills (e.g. holding a pencil to draw a picture), art and dramatic activity.

She also said that she liked the activities in the DEP materials.

She was supervising two groups, as one of the teachers was absent, having taken a sick child to the clinic.

**MS FALI**

Ms Fali is a Grade 1 teacher. Her class was split into three groups of 8 – 10 learners. Three groups were involved in writing stories in isiXhosa. One learner’s story (translated for me by an ESSO) was about the learner’s family eating and consisted of 10 sentences of, on average 8 words each. The sentences were focussed on the topic but did not build a narrative – they were more like a list of sentences based on the theme. The learner was very keen to read his work aloud to the group, and most of the other learners seemed interested to listen.

One group was busy using plastic shapes to construct houses. One of the learners told us that this group consists of learners who find writing difficult.

The teacher and a parent helper circulated around the groups as the lesson progressed.

As with the other classrooms visited, there were several examples of learners’ work displayed on the walls of Ms Fali’s classroom.

**MS NDYAVE**

Ms Ndyawe teaches a Grade 2 class. Her class was also split into four groups. Three groups each had a text and were required to identify and group words starting with the same letter, and to use a dictionary to check the meaning of words they did not know.

The fourth group were seated on the floor in the middle of the classroom and worked with the teacher “because they need my individual attention”. The teacher was using a learner workbook *My Clever Literacy Grade 2* (“Approved for Curriculum 2005”). There were enough texts for one between two and several looked very well used and were missing their covers. The activity consisted of the teacher rotating around the group, showing pictures from the text and requiring learners to describe what they could see.

Once again, learner work was displayed on the walls.
The four teachers observed and interviewed indicated quite clearly that they had learned at least the following things from their engagement with the B. Prim. Ed programme:

- Learners should be engaged in activities
- Learners need a variety of activities
- Group work is an effective way of managing the classroom
- For some activities, the teacher will play a different role for different groups (i.e. more or less active and interventionist)
- Learner work should be displayed
- Parents should be involved in the education of their children and can be asked to assist with classroom management.
Appendix B

TRIA LLING OF NUMERACY KEY ACTIVITY FOR
UMTHAMO 37 AT R H GODLO SCHOOL, MNDANTSANE,
18/10/00

*Imithamo* for Learning Areas are built around classroom-based key activities. These key activities are usually piloted in the classroom before being finalised in the *umthamo*.

The following is a record of the trialling of a key activity for *Umthamo 37* (“Shaping Teaching to Make Space for Learning”) in a Grade 4 class at R H Godlo School in Mdantsane on 18th October, 2000.

The classroom was approximately 10m by 10m and well-lit. The learners were organised into four groups. The teacher had just begun an activity with her learners when her classroom was ‘taken over’ by the UFHDEP team (3 academic co-ordinators, 2 ESSOs and the SAIDE researcher). The teacher was clearly expecting to be visited but was not sure when it would happen. She therefore took the interruption in her stride. [The researcher felt a little uncomfortable at the way in which the classroom was “taken over”. It seemed to imply that the UFHDEP work was more important than what the teacher had planned to do, and I wondered what message was conveyed by needing so many people to trial one classroom-based activity. It is possible that such issues were clarified previously, however.]

The ‘trial’ lesson started at 11.32. MN, who is writing the *Umthamo*, taught the lesson.

MN spent 5 minutes giving some background to the activity whilst handing out various objects to the four different groups (e.g. boxes, a lemon, a Flora margarine tub, pebbles etc.)

The learners were asked to sort the objects into groups. They were then asked to sort the objects differently into different groups. In each case, the selection criteria were identified and discussed by the learners.

At 11.46, MN called for the attention of the whole class. He asked one group to explain the selection criteria they had used. He then showed the class a die and a box and said these were his own new group. He asked how the two items were the same.

About half the group had their hands up and there was general consensus that the items were both “square”.


Learners were then asked to re-group their items using this criterion, i.e. square/not square.

At 11.50, one group raised the issue of whether “square” didn’t imply having equal sides. There was general consensus that it did. The groups were then asked to develop their own similar criteria to describe other groups that they were identifying.

At 11.52, some groups were asked to describe aloud the criteria they were using.

MN then wrote (in English) on the chalkboard: flat, flat and round, round all over “just like a ball.”
MN then posed the question, raised by one of the learners, on how to classify a stone.

Learners responded:
“This one is flat.”
“This one is flat but the sides are not the same.”
MN begins to write on board: Flat but not …
“How do I write – help me…”
“Round”.

11.55, MN recaps on the four groups and adds a fifth:
Not flat, not round.

11.56 Learners are asked to sort their items into the five groups indicated.
This occasions some vigorous debate in some groups.

12.00, MN raises a question posed by one group regarding the classification of a mango stone.
The consensus is not flat, not round and one learner suggests ‘like a rugby ball’.

12.01, MN asks learners to label their groups of items.
12.02, MN and others assist with labelling

12.05, MN introduces a new category: flat, not round, not straight and asks learners from different groups to show examples of the different categories.

12.08, MN chooses items at random from different groups and asks the class to suggest how they would categorize each and why.

12.10, MN asks learners to show examples of items that are not flat, not round and not straight

MN poses the question “What is flat?”
There is some discussion but the issue is not really resolved. There seems to be some confusion between flat in the sense of lacking depth and flat in the sense of a smooth surface.

12.11, MN and others, hands out magazines.
Learners are told to look for and cut out pictures of things that fit into each of the categories.

12.17, learners are asked to re-define “flat” e.g. as one learner suggests “like a slice of polony”
MN shows the bottom of a Coke bottle (which is “bumpy”) and learners conclude it is not flat.
They then continue cutting and sorting.

12.25, MN then tells the learners to finish off and close their magazines etc.
AK advises MN to tell the learners they have had fun “playing with possibilities” not “identifying rules” and there is a short exchange between MN and AK over the heads of the learners.

12.26, MN then asks the class “What do you think you’ve been doing?”
Learners say they learned about flat, not flat etc. (They tend to answer these questions in English, even though most of the oral work in the lesson has been in isiXhosa. It is almost as if there is a culture of plenary feedback in English but small group work in home language.)
MN then points out the “tricky” fact that the pictures in books etc are flat, even though the pictures are of objects that may be not flat, round etc. in reality.

12.30, MN stops the lesson and says “Thank you” to the learners and their teacher.

After the trialing, there is a de-briefing session conducted in the Principal’s office. The de-briefing covers both the described above and an earlier trial with a Grade 1 group. The following issues emerged:

The purpose of the briefing should be to tease out what was learned and how the activity can be used to change into an umthamo.

G1/G4 presented two different experiences.

What did we see?
- Both groups used rooms of houses as categories at some point
- Also what you might use the item for.
- Also colours, shape and size were used as categories.
Both groups were able to come to a decision about the nature of “square” as a category.

The *umthamo* needs to highlight the tension between offering guidance and allowing learning to be quite open-ended.

The link with the previous *umthamo* is not clear.

The *umthamo* should explore how the context affects decisions about whether or not to use small groups or the whole group.

It should require teacher-learners to reflect on why they make the decisions they do.

The concept “flat” needs greater clarity.

MN needs to sort out the final categories he wishes to suggest.

There should be more clarity about purpose and outcomes.

Small groups seemed to work well in Grade 1. The whole group seemed to work well in Grade 4.
Be alert to the potential in the unexpected, e.g. one learner suggested that a person’s face is an example of something that’s not flat.

There should be fewer categories with exemplars.

Think about the hand out process (which was quite time consuming in this instance) and the logic of the expectations that arise. Should one give at least two of everything to facilitate making groups or throw in one of something to deliberately create indecision?

Note that the position can change the attribute: an object appears different if standing on its end instead of on one of its largest surfaces.

Do you include items that are the same or ones that only look alike?

In clarifying categories, be up front about your agenda: “I’m interested to know what you think about …”

Appendix C
VISIT WITH ESSOS TO UPPER MGOMAZI SCHOOL, 19/10/00

On 19/10/00, the researcher joined a group of ESSOs for a visit to a school in the former Transkei region. It took approximately 3 hours to travel to the school, of which approximately 45 minutes was on a dirt road.

The school requested that the ESSOs visit the school, primarily to talk about parental involvement and OBE.

The following ESSOs were involved in the visit. Most play several different roles, as indicated in the following table.

<table>
<thead>
<tr>
<th>NAME</th>
<th>RESPONSIBILITIES/FUNCTIONS</th>
</tr>
</thead>
<tbody>
<tr>
<td>Pumeza Mbontsi</td>
<td>1. ESSO</td>
</tr>
<tr>
<td></td>
<td>2. <em>Umkhwezeli</em> (Stirling, EL)</td>
</tr>
<tr>
<td>Paula Botya</td>
<td>1. ESSO</td>
</tr>
<tr>
<td></td>
<td>2. <em>Umkhwezeli</em> (Stirling, EL)</td>
</tr>
<tr>
<td></td>
<td>3. Materials development</td>
</tr>
<tr>
<td></td>
<td>(think tanks/trialling/support)</td>
</tr>
<tr>
<td>Namhla Sotuku</td>
<td>1. ESSO</td>
</tr>
<tr>
<td></td>
<td>2. <em>Umkhwezeli</em> (Butterworth)</td>
</tr>
<tr>
<td></td>
<td>3. Caretaker Centre Co-ordinator in Butterworth</td>
</tr>
<tr>
<td></td>
<td>4. Materials Development</td>
</tr>
<tr>
<td>Zoliswa Mafanye</td>
<td>1. ESSO</td>
</tr>
<tr>
<td></td>
<td>2. <em>Umkhwezeli</em> (Stirling, EL)</td>
</tr>
<tr>
<td></td>
<td>3. Centre Co-ordinator, EL</td>
</tr>
<tr>
<td></td>
<td>4. Materials development</td>
</tr>
<tr>
<td>Celiwe Ngethu</td>
<td>1. ESSO</td>
</tr>
<tr>
<td></td>
<td>2. <em>Umkhwezeli</em></td>
</tr>
<tr>
<td></td>
<td>3. Centre co-ordinator (Bisho &amp; Alice)</td>
</tr>
<tr>
<td></td>
<td>4. Regional Co-ordinator – Gcuwa – Inyathi Region</td>
</tr>
<tr>
<td></td>
<td>5. Materials development</td>
</tr>
</tbody>
</table>
We left King William’s Town at 6.30 am, picked up others at the Kenyons’ house and set off at 08.05. We were expected to arrive at 10 am, but having lost our way slightly, due to a complete absence of signposting, we arrived at Upper Mgomazi School at 10.20 am. Upper Mgomazi consists of one two-room, community built block and one five room, modern government built block (separated by about 300m) on an exposed hill top. There is a solar powered radio telephone but it does not work because somebody stole the battery from the radio mast.

We were greeted by the Principal, Mr Michael Mputa, where the expected programme was outlined. Given the number of parents present, it was decided to begin with the issue of parental involvement and allow the parents to leave, if they wished, before proceeding with academic matters.

There was some movement in and out of the (very full) classroom where the meeting was held but by the end of the afternoon 21 teachers (including teachers from the secondary school) and 17 parents had signed an attendance register.

The meeting began at 10.41 with CN welcoming everybody and finalising the programme in discussion with those attending. The final agenda agreed was as follows:

1. Introduction
2. Parental involvement
3. OBE – planning a learning unit/ programme
4. Norms and Standards for Educators
5. UFHDEP B. Prim. ED
6. Management Skills
7. Teacher appraisal.

CN then introduced the ESSO team.

From 10.54 to 11.49, ZM then led discussion on parental involvement. Two minutes after she started, after she had been talking about values, a parent interrupted to suggest that they stop to pray and sing.

ZM then continued with what was largely an input session, although she occasionally directed questions to or accepted questions from the audience. Most of the discussion was in isiXhosa, although odd phrases and words were in English.
By the end of the section on parental involvement, the following notes had been written on the board:

1. Umzali – values = inkolo e.g. Ubuntu
2. Khuseleleko imabantnoma – ootishela (security)
3. OBE – (K, S, A) – Resource = vimba (examples of skills like knitting)  
   “if you are a parent, you are a resource”
4. inkxaso = support
5. Baphathi = parents → mngrs SGB selected
6. Mahlakani = partners
7. Community builders GR → G1
8. abatshiti: change agents ← socy e.g. enc. Skilled childr to help others
9. Managerial skills incl. SGB chair etc.

At 11.50, NS began a presentation on OBE. She began by using a FH brochure as a visual aid and asking what people saw on it (its shows groups of learners working together etc.).

At 11.51, the principal entered with representatives from the district office. CN then re-introduced the team.

PB and NS then recapped on the interrupted discussion.

NS read a quotation by Prof Bhengu referring to OBE as a new and liberating curriculum and a means of transforming the education system.

At 12.00, the district officials left again (and CN had to go out with them).

NS’s presentation then continued till 12.25, by which time the following notes had been made on the board:

Healing
Experience
Evaluation
Change
LOLP
Culture
Development (P, O, S D Plan)

Reflect on impl. Process
Review
Rsch
Redesign SDP

She reaffirmed the importance of COLTs and the importance of isiXhosa as forming a “community of culture”.
At 12.17, she noted that this was the end of the general background and that the next section would be professional in nature. Thus parents were free to leave if they wished.

From 12.25 to 12.40, 4 older male learners sang and danced, a group of girls danced and group of young learners also danced. The parents who remained clearly enjoyed this break from proceedings. There was a lot of smiling, laughing, whistling and clapping.

At 12.40, PB resumed the presented on OBE.

By 13.30, when I left to speak to the teacher-learner at the school, the following notes were on the board:

<table>
<thead>
<tr>
<th>Old</th>
<th>New</th>
</tr>
</thead>
<tbody>
<tr>
<td>T/C</td>
<td>L/C</td>
</tr>
<tr>
<td>Content</td>
<td>appr. based</td>
</tr>
<tr>
<td>Rote</td>
<td></td>
</tr>
</tbody>
</table>
FP
R0 – G3
IP
4 – 6
SP
7 – 9
FET
10 – 12
HE

LAs

O/C planning (K, S, A) → 1, 2, 3, 7, 4, 8 2001

Needs

Interests

Challenges

Problems through activities

assessment

evidence – processes mastered
journal entries

learner profiles

portfolios

timetabling 30m →60m (CN explained that OBE does not work well in 30-minute slots)

↓

Learning unit:

Phase

P.O.

Period

[At this point I left to talk to the TL at this school. She confirmed the trends I had observed at RH Godlo and raised issues that I subsequently picked up on in a focus group interview. See Appendix D. ]

I returned about 20 minutes later, by which time the board had been cleaned and the following notes appeared:

PI = evidence of achieving SO

AC = how you assess PI
Range/syllabus – depth & complexity

PO/LA/SO/AC/PI/RS/Act/Resources

“the textbook is there for information”

Phase: Foundation

Phase Organiser: Environment

<table>
<thead>
<tr>
<th>P.O</th>
<th>LA</th>
<th>SO</th>
<th>Activities</th>
<th>AC</th>
<th>PI</th>
<th>RS</th>
</tr>
</thead>
<tbody>
<tr>
<td>Veld fires</td>
<td>NS</td>
<td>SO3</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Trees</td>
<td>T/HSS/LLC</td>
<td>SO4</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Maize processing</td>
<td>T</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Water</td>
<td>MLMMS/LO</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Pollution</td>
<td>T</td>
<td></td>
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</tbody>
</table>
By 14.02, the teachers had been split into two groups (FP and SP) and were consulting policy documents to try to link Pos to LAs and SOs.

Several parents were still in attendance (and looking somewhat bemused).

[I asked why the emphasis on SOs in light of the C21 revisions and was told that the revisions do not have the status of policy in EC and therefore EC is proceeding with C2005 as originally envisaged.

I also asked why go through such an academic exercise? Why not teach and discuss and arrive at an understanding through a practical experience? The answer was that the ESSOs had offered to teach a demonstration lesson but that the school had said they weren’t ready for this yet. The ESSOs hope to hold a follow-up visit to do this.]

At 14.08, the whole group was involved in discussing an activity for pollution (to collect litter) and how to link to other learning areas (e.g. sort and categorise the litter into plastics, paper etc.).

ESSOs (all were now involved) emphasise that activities require the teacher to:

Watch

Support

Give clear instructions

**On board:**

<table>
<thead>
<tr>
<th>Kinds of</th>
<th>K</th>
<th>they have/ you support</th>
</tr>
</thead>
<tbody>
<tr>
<td>S</td>
<td>language/ research/ communication</td>
<td></td>
</tr>
<tr>
<td>A</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
**Assessment**
How? Rubrics linked to purpose
   → ⊗ … must be able to explain why (moving away from no’s)

14.34, four of the ESSOs stood at the front of the class to wrap up the discussion.
   “we are teaching maths and science, forgetting the kids.”

14.36, Agreed that Appraisal needs a workshop on its own.

14.37, CN leads a quick input on the *Norms and Standards*.

**On board:**
2003 all educ. Reg. with SACE

REQV 13 (360 credits) minimum

<table>
<thead>
<tr>
<th>Matric/JC</th>
<th>REQV 10</th>
</tr>
</thead>
<tbody>
<tr>
<td>+ PTC</td>
<td>REQV 11</td>
</tr>
<tr>
<td></td>
<td>must be rel. to classroom practice</td>
</tr>
<tr>
<td></td>
<td>REQV 12</td>
</tr>
<tr>
<td>PTD/STD/JS</td>
<td>REQV 13</td>
</tr>
<tr>
<td>B. Prim. Ed</td>
<td>480 c</td>
</tr>
<tr>
<td></td>
<td>16 imithamo pa @ 40h = 4 x 640 h</td>
</tr>
</tbody>
</table>

14.50, NS leads a discussion on the UFHDEP programme (using home-made posters
   attached to notice-board at back of class).
15.16, CN wraps up. Notes that they had tried to cover too much too quickly and
   would need to hold a follow up visit.

[After several hours of travelling, the ESSO team gave 5 hours of continuous input. At the end of the process we were treated to refreshments by the school staff. We then left for a 2,5 h journey home. Most of the presentation took place through the medium of isiXhosa. The ESSOs were enthusiastic and seemed to come alive when it was their turn to present. I wondered why there was a lack of pre-prepared, professional material that could be handed out regarding what are clearly issues that are frequently addressed. I also wondered why the ESSOs had had to make their own information posters for UFHDEP. I think more support and investment is needed in promotional and training materials.]
Appendix D:

TEACHER-LEARNER GROUP INTERVIEW 21/10/00

The following teacher-learners were involved in a focus group interview on the Bisho campus of Fort Hare University on 21 October, 2000:

<table>
<thead>
<tr>
<th>Name</th>
<th>Semester</th>
<th>Centre</th>
</tr>
</thead>
<tbody>
<tr>
<td>1. Buyelwa Nkitha</td>
<td>1</td>
<td>Bisho</td>
</tr>
<tr>
<td>2. Thandazwa Botha</td>
<td>1</td>
<td>Bisho</td>
</tr>
<tr>
<td>3. Nontobeko Mcetywa</td>
<td>2</td>
<td>Bisho</td>
</tr>
<tr>
<td>4. Nomaza Nyobo</td>
<td>2</td>
<td>Bisho</td>
</tr>
<tr>
<td>5. T. T. Bobo</td>
<td>2</td>
<td>Bisho (All Saints)</td>
</tr>
<tr>
<td>6. N. Xuaka</td>
<td>2</td>
<td>Bisho (All saints)</td>
</tr>
<tr>
<td>7. Nomthandazo Botha</td>
<td>3</td>
<td>East London</td>
</tr>
<tr>
<td>8. Nomzamo Joya</td>
<td>3</td>
<td>Bisho</td>
</tr>
<tr>
<td>9. Namhla Sowazi</td>
<td>3</td>
<td>Bisho</td>
</tr>
<tr>
<td>10. Ivy Ntloko</td>
<td>3</td>
<td>Bisho</td>
</tr>
<tr>
<td>11. Nonkoliseko Kawa</td>
<td>3</td>
<td>Bisho</td>
</tr>
<tr>
<td>12. Doreen Masoabi</td>
<td>3</td>
<td>Bisho</td>
</tr>
<tr>
<td>13. Boniswa Blou</td>
<td>3</td>
<td>Bisho</td>
</tr>
<tr>
<td>14. Z. W. Kosi</td>
<td>3</td>
<td>Bisho</td>
</tr>
<tr>
<td>15. Z. L. Mfulana</td>
<td>3</td>
<td>Bisho (All Saints)</td>
</tr>
<tr>
<td>16. N. E. Wambi</td>
<td>3</td>
<td>Bisho (All Saints)</td>
</tr>
<tr>
<td>17. Goduka Noludwe</td>
<td>3</td>
<td>Bisho (All Saints)</td>
</tr>
<tr>
<td>18. M. Msindo</td>
<td>3</td>
<td>Bisho</td>
</tr>
<tr>
<td>19. Adam Ntombi</td>
<td>3</td>
<td>Bisho</td>
</tr>
</tbody>
</table>

1. Why have you chosen to study further?
Reasons given included: to develop educational skills; to be empowered; to help uplift the standard of education; to learn improved teaching methods.

Note: Nobody specifically mentioned the need to upgrade in terms of the Norms and Standards for Educators requirements. However, one TL mentioned that exposure to these requirements was a revelation to her and several others concurred.

2. What made you choose the Fort Hare B. Prim. Ed?
Reasons given included repetition of above and:
- “It empowers me to cope better with new methods of teaching in the Primary”
- like emphasis on doing things with learners
- like the fact that assignments draw on everyday work experience.
Note: The latter two points show that at least some learners were able to hone in on some of the characteristic features of the programme.

3. What was the most useful umthamo? Why?
In general, these TLs found it difficult to single out a particular umthamo for praise.

After some thought, the following were mentioned:
- An LLL umthamo on ways of thinking
- The Technology imithamo (because it is a new learning area)
- Schools as Learning Communities

4. What was the least useful umthamo? Why?
Most TLs were unable to answer this question. They all thought that all the imithamo were useful (although some were more difficult to do than others).

1 TL felt that the activities in the first Maths umthamo (Umthamo 5) could have been made clearer.

5. How has the B. Prim. Ed changed, if at all, the way you think about:
- learning
- teaching
- the purpose of education
- knowledge?

Not all the TLs were ready to engage with this question. (I only subsequently realised that some TLs were still in the early parts of the programme.)

The following ideas emerged from the discussion:
- Challenging
- Learning new approaches
- Learner-centredness
- Purpose of education is empowerment of learners
- Not ‘jug and mug’: learners have their own knowledge which must be appreciated

6. What is the most important part of the programme? Why do you say this?

Imithamo
Ukhwezeli
ESSO meetings
Other

There was unanimous agreement that all the different parts of the programme are equally important as “they work hand in hand”.

45
With some probing, one TL thought that perhaps the *imithamo* were the most important part of the programme as everything else flowed from the activities included in the printed materials.

Note: the responses to questions 3, 4 and 6 suggest that most learners see the programme as a cohesive whole rather than as discreet parts.

7. **What is the most important of an *umthamo*? Why do you say this?**
   - Introduction
   - Conclusion
   - Key activities not handed in
   - Key activities handed in
   - Other

The general consensus was that all parts of an *umthamo* are equally important, although one learner thought that the introduction was particularly important as it gave the TL some idea of what the whole *umthamo* was about.

8. **How much time, on average, do you spend on an *umthamo*?**
   - On preparing for *ukhwezeli*
   - In *ukhwezeli*
   - On reading
   - On the key activity
   - On your journal?
   - Other?

This question occasioned some debate and humour! It was clear that these TLs had never really thought about this. Having them think back through their experience of the previous *umthamo* and then add up the amount of time suggested that the notional learning time of 40 hours is actually a quite reasonable estimate. It might be useful to find ways of tracking this more carefully, however, perhaps by giving estimated times for different activities and requiring learners to record the amount of time they actually took.

9. **Is the site of your learning centre easy to get to in terms of roads and transport?**
   General consensus was yes, especially the All Saints campus (changed from UFH’s Bisho campus at the request of the TLs).

10. **How reliable is public transport to the site? What is the cost?**
    There are regular minibus taxis. Costs range from R 8, 50 to R 16,00 for a round trip. However, one learner has to travel from Sterkspruit at a round trip cost of R 23 to R 25.
11. At what times can you use the resources of the learning centre?
There was some disagreement here. Some learners felt that they could use the centre only on Saturday mornings during contact sessions, whilst others said that although the classrooms were used by other learners, there were often classrooms free in the afternoons.

12. What suggestions can you make for improving the centre?
The All Saints campus is more accessible but the library is at the UFH Bisho campus. It would be useful if the library could be moved or a separate library specific to the B. Prim. Ed could be established at All Saints.

13. If you could make one change to the programme, what change would you make?
The following suggestions arose:

- Create an opportunity to engage with writers of imithamo so that writers can explain exactly the purpose they had in mind (majority support for this)
- Widespread, but not unanimous, support for the following:
  - Offer more support in schools e.g. principals not always on board, difficult to involve parents (as required by one umthamo)
  - More curriculum support (some TLs are teaching in schools that still follow the old curriculum which makes it difficult to fit in the activities required by the course. One learner pointed out, however, that the programme is designed to question the old syllabus …)
  - Streamline the school support – principals are not always willing to approach EDOs when TLs request ESSO visits
  - Help with getting bursaries
  - Give formal recognition in the form of credits for completion of each semester
  - Provide cameras and tape recorders for imithamo that require use of these
  - Provide additional reading materials
  - Include computer studies.
Appendix F:

OBSERVATION OF A FACE-TO-FACE CONTACT SESSION – SATURDAY 21 OCTOBER 2000 AT EAST LONDON TEACHERS’ CENTRE

The East London Teachers’ Centre is located in a formerly all-white suburb and therefore not on a direct taxi route. Teacher-learners therefore need to walk about 1.5km to get from where the taxi drops them to the centre.

The abakhwezeli use an office here as the base for their ESSO work for the DOE, and the Centre Co-ordinator uses this office to store some learning materials.

I observed three groups during the course of the morning.

GROUP ONE

windows       pinboard

Room approx. 8m by 14m

1 desk at front used by Umkhwezeli for supplies, including:
flip chart paper, pens and pins
lined paper
counter books for journals
concertina files
imithamo

The sessions began with 19 learners in the room. Others drifted in as the morning progressed. By the end of the morning, there were 42 learners present.

The umkhwezeli was assisted by a trainee.

09.00 Welcome and introductions. [90% isiXhosa, 10% English as LoL]
09.01 Z entered to remind new TLs to complete registration forms before leaving.
09.04 Attendance register circulated.
09.05 Distribution of counter books for journals and assessment criteria. Um.
explains TLs should write in journals when directed to do so by umthamo.
09.07 Um. asks: “Who is new?” [11 hands go up.]
Um. “We need to go back and do some things we did last time.” [This was actually session 2.]
Writes on flipchart paper pinned to board: “structure of course”
09.09 As Um. writes, half TLs watch and half (new) write notes
Um. writes 16 imithamo p.a.
After 8, portfolio presentation – “you are going to justify your portfolio”
Um. writes: show work of learners
09.12 Um. writes: continuous assessment [writing accompanied by isiXhosa narrative]
09.14 Um. “take out your 1st umthamo. Hands up if you don’t have it ...”
09.15 Um. “first look at the cover – what is there ... what do you see?”
Um. “this course is about talking ... so you have to talk.”
TL. “One of them reads.” [the cover shows various pictures of learners working]
09.16 Um. starts a brainstorm on flipchart paper of ideas from TLs
09.20 6 TLs appear to be copying the brainstorm
09.22 Cell phone rings. Um. “Remember the house rules” [CP switched off.]
Um. “Turn to contents page of Umthamo.”
“What does it tell you?”
TLs suggest: what is inside/ where to find ...
Um. “What is inside? Feel free. You have to talk. We are teachers ...”
Um. facilitates brainstorm on contents page; draws attention to key activities
2, 4, 5
09.26 Um. “Let’s go to p. 11 of Unit 1 – see the Journal icon ...Can someone read for us what it says?”
“Now we have to take our journals and write date and time ...
... write exactly what you are told to write ... 5 minutes ...
... write what you think communication is ...”
TLs write in journals. Other TLs arrive and are directed to seats by trainee.
09.33 Newcomers ask others what they are to do.
09.34 Um. writes: What did you find interesting?
What would you like to know more about?
Um. asks TLs to exchange journals and comment on what has been written in terms of the above questions ... “just a few lines ... maybe four lines and give your name...”
09.39 Um. gives out sections of newspapers and magazines – enough for 1 to 2/3
09.40 Um. “Take back your journals ... take a magazine or newspaper and turn to p. 21 of the Umthamo ... do what it says in Activity 3 for an intermediate phase class ...
09.41 Um. “Don’t work alone ... work with somebody ... we don’t work alone ... we have to talk ...”
09.44 Um. visits groups to suggest TLs read the activity before starting to cut or tear pictures. [Activity requires TLs to find pictures of people communicating.]
09.48 A lot of discussion (mix of isiXhosa and English) and picture tearing
09.49 Um. circulates – notices one lady not participating (she came late) – asks group to explain to her what they are doing – then expands on task herself
09.55 Researcher took photos. Most people did not notice!
10.04 Groups still working on activity. Most people participating actively – a lot of talking and justifying of why particular pictures have been chosen
10.06 Um. encourages one lady to participate more actively
10.07 Um. “Five minutes left.”
10.12 Um. “… it is time for us to do reporting ...”
10.14 Um. invites report backs from “those who can”. TLs must show a picture they have chosen and try to describe what is being communicated.
Many people wish to participate. Some presentations are in isiXhosa and some in English; some read notes and some extemporise. In all, 20 people give feedback, the last lady on her sixth attempt to speak!

10.27 Um. “OK, thank you … some still want to talk … shows why you want to change to learner-centred approaches … share out the pictures …” and directs Tls back to umthamo

[At this point I left to visit another group. In fact two groups, sharing the same room.]

Groups 2 and 3 were sharing the same room of about 12m by 4m. Group 2 had a white Umkhwezeli and in this group TL-Umkh. interaction and whole group discussion used English as LoL, whilst pair work tended to use isiXhosa. Group 3 had a black Umkhwezeli and isiXhosa was the main LoL in both whole group and 1 to 1 exchanges. The Umkh. for group 3 had placed a single sheet of paper (A3) on the wall outlining the morning’s activities.

GROUP 2

10.38 discussion in groups of 3 on how to use the waste materials they were collecting
10.45 1 TL brings out examples of use of waste by her learners to make model “plants” the Um. encourages the TL to explain the process she used the examples provoke a lot of discussion and admiration
10.48 Um. “Don’t use waste materials only for models … examples … puzzles, adding bottle tops, looking for the occurrence of the word “the” in a newspaper scrap. Make your own filter …
10.52 Um. refers Tls to pp. 26 to 28 of Umthamo 28
10.55 Um. “if something doesn’t work, it does not mean you get low marks so long as you can reflect on what went wrong …”
11.02 Group involved in completing self-, peer-, Umk. Assessment slips
11.04 Um. Collects in assessment slips. Hands out cardboard triangles of various kinds and a sheet of paper to each TL. Asks TLs to fold the paper around the triangle/ draw around the triangle, to make patterns. She says they have 10 mins for this.
11.09 Um. Says “We don’t want any gaps.” There is some consternation at this!
11.11 Um. asks Tls to show their paper to the person next to them and to discuss their patterns
11.15 Um. asks “What is a pattern?” Some suggestions from Tls
11.17 Um. “…patterns … repeating the same thing … not always the same …”
11.37 Um. shows Tls how to use their fingers to calculate multiples of 9 “work it out … do it before you go …”
GROUP 3

10.32 A TL is describing what she did in relation to an activity
Others comment
10.38 Um. asks for clarification of an issue raised by a TL
10.45 Um. refers to overall purpose and plan for sessions, referring to outline on wall
Semester 5 maintaining Umthamo 33
Introducing Umthamo 34
10.49 Um. hands out Umthamo 34
Um. writes on board – while she is writing, TLs debate the amount of time to be spent on different activities …
10.52 Um. says it is necessary to “think critically about the amount of time we spend on each umthamo – the time is up to you …”
Um. talks to notes she has written on the board:
extend the academic reading challenge
high interest value
reasonable academic style
review literature

expands on what they mean or might mean …
10.55 Um. hands out assessment slips
11.02 Um. begins orientation to Umthamo 34 pointing out links to other Umthamo
Asks TLs to pause and “think about what was covered in the strand to date”
11.04 Um. leads TLs through a physical examination of Umthamo 34 – contents, 2\textsuperscript{nd} page, particular paragraphs
She asks a TL to read a paragraph and asks the group to pick out the key words/ideas
11.09 Um. asks a TL to read something on p.3. There is a deliberate repetition of “the” in the text but the TL does not read the 2\textsuperscript{nd} “the” – in fact she does not even notice it is there till it is pointed out to her – Um. points to distinction between form and going for “meaning”
11.11 Um. asks another learner to read a sentence: The yolk of an egg are white.
TL picks up on grammatical error but not the factual error.
Some debate here – the TL seems to feel that she has lost some prestige here in not noticing the obvious factual error…
11.15 Um. points out again distinction between form and meaning
11.16 Um. “… need to emphasise sense …

The following issues struck the researcher during this observation:
• affirmation of mother tongue as language of learning
• high degree of learner participation …
• … and motivation to do so
• smooth operation of the self-, peer, umkhwezeli- assessment in the more experienced groups
• relatively small amount of teacher-talk and high amount of TL-talk
• no attempt to try to cover everything which can lead to transmission styles of teaching
• TLs involved in decisions about what to discuss and how much time to spend on it
• TLs provided with all key resources, including journals and concertina files
• very relaxed atmosphere … umkwhezeli as co-learner rather than expert
flexibility about time – abakhwezeli did not rush off as soon as the contact session had formally ended.

SUGGESTED FOLLOW-UP

The UFHDEP offers a valuable alternative model for the in-service education of teachers as well as lessons of experience regarding the challenges of going to scale in a largely rural province. As such, I feel that the UFHDEP merits further, more in-depth research, over a period of time.

If it is possible to arrange a follow-up visit, I think it would be useful to try to do the following:

• interview the Programme Director about the long-term vision for the programme and the ongoing challenges of managing the growth of the project
• interview the support staff, in particular, staff involved with administration of admissions and learner records, materials distribution and the management of learner support
• interview regional and centre co-ordinators from the other two regions where I understand slightly different, and perhaps more challenging, conditions pertain
• interview DOE official(s) responsible for managing the partnership with UFH and the co-option process
• observe a monthly management and co-ordination meeting
• observe an abakhwezeli recruitment and training session
• review the draft of Umthamo 37 to see how the trialling session has informed the development of the material
• conduct focussed 1-to-1 interviews with a range of learners across the spectrum of achievement and working and studying environments in order to build up rich descriptions of how they actually engage with the materials.

As preparation for the latter, I would like to dedicate 1 to 2 days to a focussed review of the materials. Then revisit the review, and any recommendations I had made, in light of the interviews.

During the 1-to-1 interviews with teacher-learners, I would be seeking to tease out the following issues by asking them to describe/show me what they actually do:

• Why did you decide to enrol for the distance education B. Prim. Ed rather than studying full-time?
• Have you ever studied by distance education before? If yes, describe your experience.
• What were your expectations about studying this programme by distance education?
[Probe: did you think it would be easier/more difficult than FT study? Why? Did you read often before starting the course? What kinds of things did you read? Do you still read these things now in addition to your study? Do you read any other things?]

- Have your attitudes to the following changed at all as a result of your experiences on the programme? Explain
  - Learning and teaching
  - Reading and writing
  - Distance education

- Describe for me what you did with the materials when you received your first umthamo:
  - Before the face-to-face session
  - During the face-to-face session
  - After the face-to-face session

- Describe to me and show how you are studying the umthamo you are currently working on.
  [Probe for planning, warm-ups, previews, underlining, highlighting, margin-notes, separate notes, reviewing, summarising, asking questions …]

- Here is a typical page from one of your umthamo (dominant design features including icons).
  - Tell me what you like about the way this page is presented. Why do you say this?
  - Tell me what you don’t like about the way this page is presented. Why do you say this?

- Here are some other pages from your materials (with non-standard features). In each case:
  - Tell me what you like about the way this page is presented. Why do you say this?
  - Tell me what you don’t like about the way this page is presented. Why do you say this?

- If we were to revise these materials, what changes would you suggest that we make in order to make them easier for you to study. Try to explain why you say this.

The above suggestions represent a first stab at the issues. I welcome constructive criticism, changes, additions etc.