CHE

Council on Higher Education

Enhancing the contribution of Distance Higher Education in South Africa

Report of an investigation led by the South African Institute for Distance Education

SEPTEMBER 2004

CHE

Enhancing the Contribution of Distance Higher Education in South Africa

Report of an investigation led by the South African Institute for Distance Education

Council on Higher Education
Published by:
The Council on Higher Education
Didacta Building
211 Skinner Street
Pretoria
South Africa
PO Box 13354
The Tramshed
0126
South Africa
Tel. +27 12 392 9132
Fax. +27 12 392 9120
Website: http://www.che.ac.za

ISBN: 1-919856-38-2
Date of Publication: September 2004

Produced by comPress
www.compress.co.za

CONTENTS

Foreword vii

Abbreviations and Acronyms Used x

List of Tables and Figures xiii

Acknowledgements xii

Introduction 1
- Background 1
- Aims of the Investigation 2
- Principles Underpinning the CHE Investigation and Advice 2
- Undertaking the Investigation 3
- Research Report and Policy Advice Report 7

Chapter One
Distance Education in South African Higher Education 8
- Introduction 8
- Development of Provision 8
- General Characteristics of Provision in 2001 9
- Key Policy Issues in Distance Education since 1994 15
- Conclusion 22

Chapter Two
Perspectives from the Institutions 23
- Introduction 23
- Defining and Describing Distance Education 23
- Integrating ICT into Education Programmes 25
- Convergence or Blurring 27
- Differentiated Institutions 29
- The Role of Distance Education 30
- Perceived Disadvantages of Distance Education 31
- Conditions and Criteria for Provision of Distance Education at Face-to-Face institutions 32
- The Funding Framework 33
- Institutional Policies Pertaining to Provision of Distance Education 35
- Predictions for the Future of Distance Education Provision 35
- Conclusion 36

Chapter Three
Case Studies of Distance Education Provision in the Higher Education System 37
- Introduction 37
- Purpose of the Case Studies 37
- The Case Study Research Method and Process 37
- Salient Features of the Case Studies 42

Key Findings of the Case Studies: Institutional Focus 62
Key Findings of the Case Studies: Programme Focus 63
Conclusion 72

Chapter Four
The Changing Role and Nature of Distance Education in the Higher Education System 74
Introduction 74
The Continuum of Education Provision 74
The Role of Distance Education 79
Differentiated Institutions 93
Looking at Quality in Programme Provision 97
Issues Requiring Additional Investigation 100
Conclusion 102

Chapter Five
Financing Distance Education Programmes in South African Higher Education 104
Introduction 104
The Financial Logic of Distance Education 104
Reviewing the Cost of Distance Education Delivery in South Africa 114
Comparing the Data with Illustrative Examples 123
Some Models for Funding Distance Education 128

Chapter Six
Strategies for Assuring the Quality of Distance Education Provision 142
Introduction 142
Strategy No. 1: Infusion of Distance Education Concerns into HEQC Criteria 145
Strategy No. 2: A Comprehensive and Up-to-Date Set of Quality Criteria for Distance Education 150
Strategy No. 3: Minimum Targets for Distance Education 152
Strategy No. 4: Review of Large-Scale Distance Programmes 154
Strategy No. 5: Provider Readiness to Offer Programmes Using Distance Education 155
Conclusion 156

Chapter Seven
Strategies for Developing Quality Learning Resources 158
Introduction 158
Research Methodology 158
Changing Practices in Institutions 159
What it Takes to Develop Quality Learning Resources 159
A Proposed Strategy 160
Components of the Strategy 161

Issues Requiring Additional Consideration when Developing and Sharing Quality Learning Resources 167

Summary 172

Summary and Conclusions 174
Introduction 174
The Research Process 174
The Significance of Distance Education 174
The Nature of Distance Education in South Africa 175
The Role of Distance Education 177
A Framework for Distance Education Provision 178
Learning Resources 186
Learning Centres 188
Conclusion 189

Appendices
Appendix 1 List of Stakeholders, Institutions and Organisations that made Oral Presentations and Written Submissions to the CHE Task Team 190

Appendix 2a List of Participants in the Learning Resource Workshop 191

Appendix 2b Programme for the Workshop on Strategies for Collaborating on Learning Resources 193

Appendix 3 List of Research Instruments 199

Appendix 4 List of Background Papers Produced in the Course of the Investigation 200

Appendix 5 List of Source Documents 201

Select Bibliography 202

Background Papers

Various papers were produced in the course of the investigaion. These can be found at http://www.che.ac.za/projects/distance education. A list of titles appears in Appendix 4.

FOREWORD

The Council on Higher Education (CHE) is an independent, statutory body established by the Higher Education Act of 1997. The CHE's mission is to contribute to the development of a higher education system that is characterised by equity, quality, responsiveness, and effective and efficient provision and governance and management. The CHE makes this contribution by providing advice on higher education policy issues to the Minister of Education, through the quality assurance activities of its Higher Education Quality Committee (HEQC), through monitoring and evaluation of aspects of higher education, and various other important activities.

This research report, which presents an impressive array of description, analysis and findings on key aspects of distance higher education in South Africa, is the result of an extensive investigation prompted by a request to the CHE in late 2002 from the Minister of Education for advice on 'the role of distance education in the development of the higher education system'.

The Minister of Education expressed concerns around 'the unanticipated consequences of the proliferation of distance education programmes offered by contact institutions in the absence of a clear policy framework' on the emerging single dedicated distance education institution (the University of South Africa – UNISA); and also around the relevance and quality of the distance education programmes offered by contact institutions, 'especially as the introduction of the programmes appeared to have been driven by financial gain, in particular with respect to programmes offered in partnership with private providers'. In these regards, the Minister of Education requested the CHE to advise him on

- The conditions and criteria which should govern the provision of distance education programmes by traditionally contact institutions, given the concerns raised in the National Plan.
- The broader role of distance education in higher education in the light of current and future international trends and the changes in information and communication technology. This would ensure that distance education is well placed to contribute to the development and transformation of the higher education system and its role in social and economic development.
- The role of a single distance education institution in South Africa, in particular, the role the latter could play, as the White Paper suggests, in the development of a 'national network of centres of innovation in course design and development, as this would enable the development and franchising of well-designed, quality and cost-effective learning resources and courses, building on the expertise and experience of top quality scholars and educators in different parts of the country' (White Paper, 1997: 2.61).

It subsequently became clear that the Minister also sought advice on the funding of distance education.

The investigation of the CHE that has been synthesised in this research report was undertaken in a complex context in which the Ministry acknowledged in both the 1997 White Paper and

the 2001 *National Plan for Higher Education* that the 'traditional distinction between contact and distance institutions and modes of delivery is becoming increasingly blurred' (MoE, 2001: 60). It also accepted the CHE's suggestion in its *Towards a New Higher Education Landscape*) that higher education programmes existed on a continuum running from 'provision purely at a distance to provision that is purely face-to-face' (CHE, 2000:44). This implied that it was extremely difficult to identify at which point of the continuum many programmes sat, and hence how they might be categorised. Furthermore, other research had identified the ever-growing diversity of education practices, from distributed lecturing systems using video-conferencing to systems using well-designed study guides and decentralised tutorial support, being clustered under the 'catch-all' phrase of *distance education*.

Within this complex terrain, and taking the Minister of Education's request as the point of departure, the specific aims of the CHE investigation were to:

1. Develop a shared understanding of the changing nature of distance education and its costs and role in higher education, and attempt to circumscribe what is being referred to as 'distance education'.
2. Develop guidelines for role differentiation in the distance education sector.
3. Recommend defensible and durable conditions and criteria relating to distance education provision for the Ministry to use in guiding the programme mix at South African public higher education institutions. This will be based in part on an agreement with the Higher Education Quality Committee (HEQC) on criteria for quality distance education provision and their role in assuring these.
4. Propose ways in which distance education might be funded.
5. Recommend mechanisms to harness the best expertise in the country to develop high quality learning resources for widespread use in the higher education sector.

The investigation took as its point of departure the vision and goals for higher education expressed in the White Paper and the National Plan and the key values and principles that are intended to guide the process of transformation and development in higher education. The investigation concentrated on distance education in the public higher education sector as the issues on which the Minister requested advice pertained primarily to this sector. Further details relating to the investigation are covered in the Introduction to this report.

As always in an investigation of this nature and in the production of a major research report, there are numerous actors to be thanked. The CHE extends its gratitude to the following:

- The members of the CHE Task Team that spearheaded the investigation into distance higher education in South Africa.
- The Council of the CHE, which guided the investigation and approved the Policy Advice Report to the Minister of Education.

- The 24 higher education institutions and representative organisations that made submissions and presentations to the Task Team, and whose thinking and ideas informed the work of the Task Team.
- The higher education institutions that graciously provided permission to conduct 10 case studies.
- The South African Institute for Distance Education (SAIDE) which served as a consultant to the Task Team, and supported the Task Team in various ways.
- Local and international researchers who were contracted to carry out research on specific issues.
- Higher education and distance education specialists who participated in a workshop on developing and sharing quality learning resources in South African higher education.
- The international distance higher education specialists from the United Kingdom, Canada, Malaysia, Nigeria, Australia, United States, Ghana and New Zealand who participated in the CHE seminar in Cambridge, England, and critically commented and advised on the draft proposals of the CHE Task Team.
- The staff of the Open University in the East of England who provided tremendous assistance in the organising of the Cambridge seminar.
- Officials in the Higher Education Branch of the national Department of Education (DoE), and especially the Planning Directorate who made submissions and presentations and provided the required data on enrolments and funding and financing.
- The members of the CHE Secretariat who assisted in the production of this Report and especially the Project Administrator of the Task Team investigation.

Finally, the CHE is grateful to:

- The Ford Foundation for a large grant to support the CHE investigation into distance higher education.
- The United Kingdom Department for International Development for its financing of the CHE seminar in Cambridge, England.

The research report can be viewed on the CHE website – http://www.che.ac.za

The background papers produced in the course of the investigation (listed in Appendix 4) are too extensive to publish with this report, but can be downloaded from the website.

Researchers seeking access to the original source materials that have gone into the production of this research report may request permission for access from the Chief Executive Officer, Council on Higher Education, P.O. Box 13354, The Tramshed 0126. E-mail to ceo@che.ac.za, Tel: (012) 392 9121, Fax: (012) 392 9110.

Prof. Saleem Badat
Chief Executive Officer, CHE
Pretoria, May 2004

ABBREVIATIONS AND ACRONYMS

ANC	African National Congress
CHE	Council on Higher Education
CTP	Committee of Technikon Principals
DALRO	Dramatic, Artistic and Literary Rights Organisation
DCS	Department of Correctional Services
DE	Distance Education
DEOL	Distance Education and Open Learning
DoE	Department of Education
DoL	Department of Labour
DTP	Desk Top Publishing
EsATI	Eastern Seaboard Association of Tertiary Institutions
FTE	Full-time Equivalent
GATS	General Agreement on Trade and Services
GNP	Gross National Product
HE	Higher Education
HEI	Higher Education Institution
HEMIS	Higher Education Management Information System
HEQC	Higher Education Quality Committee
HRD	Human Resource Development
HSRC	Human Sciences Research Council
ICT	Information and Communication Technology
IT	Information Technology
MoE	Ministry of Education
Nadeosa	National Association of Distance Education Organisations in South Africa
NCHE	National Commission on Higher Education
NGO	Non-Governmental Organisation
NPDE	National Professional Diploma in Education
NPHE	National Plan for Higher Education
NRF	National Research Foundation
NSFAS	National Student Financial Aid Scheme
ODL	Open and Distance Learning
PC	Personal Computer

P/G	Postgraduate
POD	Print on Demand
PQM	Programme and Qualification Mix
RPL	Recognition of Prior Learning
SADC	Southern African Development Community
SAIDE	South African Institute for Distance Education
SAQA	South African Qualifications Authority
SAUVCA	South African Universities' Vice-Chancellors' Association
SETA	Sector Education and Training Authority
SSA	Sub-Saharan Africa
TSA	Technikon Southern Africa
U/G	Undergraduate
UK OU	Open University of the United Kingdom
UNISA	University of South Africa
USA	United States of America
USM	University Sains Malaysia
USQ	University of Southern Queensland
UT	University Terbuka (Indonesia)
VUDEC	Vista University Distance Education Campus

LIST OF TABLES

Table 1:	Distance Education at Predominantly Face-to-Face Universities in 2001	10
Table 2:	FTE Enrolments in Different Fields of Study at Universities	11
Table 3:	Overview of the Case Studies Selected	38
Table 4:	Illustrative Design Time Estimates	106
Table 5:	Examples of Course Development Teams	107
Table 6:	Costs of Some School Equivalency Projects	110
Table 7:	Comparison of Developed and Developing Countries to Meeting National Needs in Higher Education Proivision	113
Table 8:	Summary of Case Study Information (Costing)	122
Table 9:	Hypothetical Case Study One – Correspondence	125
Table 10:	Hypothetical Case Study Two – Correspondence Plus Contact Support	126
Table 11:	Hypothetical Case Study Three – Multimedia Using a Design Team	128
Table 12:	Institutional Criteria for Offering Distance Education	146

LIST OF FIGURES

Figure 1:	Ratios for Different Fields of Study in 2001	12
Figure 2:	FTE Enrolments at Different Levels at Universities	13
Figure 3:	FTE Enrolments at Different Levels at Technikons	14
Figure 4:	Overlap between Traditional Face-to-Face and Dedicated Distance Institutions	75
Figure 5:	Increasing Access to Universities: Race	81
Figure 6:	Increasing Access to Universities: Age	82
Figure 7:	Increasing Access to Technikons: Age	83
Figure 8:	Increasing Access to Universities: Gender	84
Figure 9:	Increasing Access to Technikons: Gender	85

ACKNOWLEDGEMENTS

CHE Task Team

- CHE Members
  - Prof. Stef Coetzee
  - Ms Jennifer Glennie
  - Prof. Saleem Badat
  - Dr Mala Singh

- South African Members
  - Prof. Narend Baijnath
  - Prof. Antony Melck
  - Ms Evelyn Nonyongo

- International Members
  - Dr Gajaraj Dhanarajan
  - Dr Olugbemire Jegede

Investigation leader

The South African Institute for Distance Education (SAIDE) – Jennifer Glennie and Maryla Bialobrzeska

Background papers

Dr Alexander Romiszowski

- A Study of Distance Education Public Policy and Practice in the Higher Education Sectors of Selected Countries: Synthesis of Key Findings.

Ms Thandi Ngengebule

- An Overview and Analysis of Distance Education Policy in Higher Education in South Africa.

Mr Tony Mays and Mr Neil Butcher

- Costing Summary of 10 South African Case Studies.

Compiled for Nadeosa by Ms Tessa Welch

- Criteria for Quality Distance Education in South Africa – 2003.
- Minimum Targets for Distance Education in South Africa – 2003.

Ms Tessa Welch

- Provider Readiness to Offer Programmes Using Distance Education and/or Electronic Learning Methods.

Research on international perspectives on distance education provision

Prof. Afzal Mohammad

- India
- Sri Lanka
- Pakistan

Dr Alexander Romiszowski
- Brazil
- Malaysia
- Indonesia

Compilation of institutional responses
Ms Matseleng Alais

Coordination of case study research
Ms Maryla Bialobrzeska

Case study researchers
Ms Maryla Bialobrzeska
Ms Mmapula Kekana
Ms Paula Krynauw
Mr Tony Lelliott
Mr Goloa-Tshwene Moiloa
Dr Wanjiku Mwagiru
Ms Rachel Prinsloo

Statistical information
Ms Jean Skene (Department of Education)
Ms Jennifer Glennie
Mr Sean Randell

Costing of the 10 South African case studies
Mr Tony Mays and Mr Neil Butcher

Funding distance education
Mr Neil Butcher

Quality assurances in distance education
Ms Tessa Welch

Proposals on developing and sharing quality learning resources in South African higher education
Ms Christine Randell
Prof. Louis van Niekerk

Participants in seminar with international distance education specialists in Cambridge, England

South African participants:

Prof. Saleem Badat	Council on Higher Education, Pretoria, South Africa
Prof. Narend Baijnath	Technikon SA, Florida, South Africa
Ms Maryla Bialobrzeska	South African Institute for Distance Education (SAIDE) Johannesburg, South Africa
Mr Neil Butcher	South African Institute for Distance Education (SAIDE) Johannesburg, South Africa
Ms Jennifer Glennie	South African Institute for Distance Education (SAIDE) Johannesburg, South Africa
Prof. Antony Melck	University of Pretoria, Pretoria, South Africa
Ms Evelyn Nonyongo	University of South Africa, Pretoria, South Africa
Dr Mala Singh	Higher Education Quality Committee, Pretoria, South Africa
Ms Tessa Welch	South African Institute for Distance Education (SAIDE) Johannesburg, South Africa

International participants:

Dr Sharon Ahmat	Wawasan Education Foundation, Penang, Malaysia
Mr Terry Allsop	International Foundation for Open Learning, Cambridge, England
Dr Joan Collinge	Simon Fraser University, Vancouver, Canada
Ms Anne Gaskell	Open University in the East of England, Cambridge, England
Ms Helen Lentell	Commonwealth of Learning, Vancouver, Canada
Mr Roger Mills	Open University in the East of England, Cambridge, England
Prof. Michael Moore	Pennsylvania State University, Pennsylvania, USA
Ass. Prof. Som Naidu	University of Melbourne, Melbourne, Australia
Dr Mercy Ogunsola-Bandele	National Open University of Nigeria, Abuja, Nigeria
Dr Theophilus Ossei-Anto	Commonwealth of Learning Institute for Education & Development & Extension, University of Education, Winneba, Ghana
Dr Yusuf Sayed	Department for International Development (DfID), London, England
Dr Linda Sissons	Wellington Institute of Technology, Wellington, New Zealand
Mr Alan Tait	Open University in the East of England, Cambridge, England

Compilation of selected bibliography

Ms Jenny Louw

INTRODUCTION

BACKGROUND

In October 2002, the Council on Higher Education (CHE) received a request from the Minister of Education for advice on distance education, which reads as follows:

> **The role of distance education in the development of the higher education system**
>
> The National Plan raised two concerns relating to the unanticipated consequences of the proliferation of distance education programmes offered by contact institutions in the absence of a clear policy framework, namely, (a) the impact of these programmes on the sustainability of the dedicated distance education institutions, in particular, given the proposal to establish a single dedicated distance education institution through the merger of the University of South Africa (UNISA), Technikon Southern Africa (TSA) and the distance education campus of Vista University (VUDEC); (b) the relevance and quality of the programmes, especially as the introduction of the programmes appeared to have been driven by financial gain, in particular with respect to programmes offered in partnership with private providers.
>
> The National Plan on Higher Education agreed with the recommendation of the CHE's Size and Shape report that it was necessary to develop a 'clear policy directive, including conditions and criteria, for the continued provision of large-scale distance education programmes by traditional contact institutions' (NPHE: 62).
>
> I would therefore like to request the Council to advise on:
>
> - The conditions and criteria which should govern the provision of distance education programmes by traditionally contact institutions given the concerns raised in the National Plan.
> - The broader role of distance education in higher education in the light of current and future international trends and the changes in information and communication technology. This would ensure that distance education is well placed to contribute to the development and transformation of the higher education system and its role in social and economic development.
> - The role of a single distance education institution in South Africa, in particular, the role the latter could play, as the White Paper suggests, in the development of a 'national network of centres of innovation in course design and development, as this would enable the development and franchising of well-designed, quality and cost-effective learning resources and courses, building on the expertise and experience of top quality scholars and educators in different parts of the country'. (White Paper: 2.61)

It subsequently emerged that the Minister also wanted advice on the funding of distance education.

At its meeting in October 2002, the CHE appointed a Task Team to respond to this request by conceptualising and implementing an investigation. This research report reflects extensive investigation and research, as well as engagements with various constituencies and stakeholders during 2003.

AIMS OF THE INVESTIGATION

The CHE investigation was undertaken in a complex context in which the Ministry has acknowledged, in both the White Paper (1997) and the 2001 National Plan for Higher Education (NPHE), that the 'traditional distinction between contact and distance institutions and modes of delivery is becoming increasingly blurred' (MoE, 2001: 60). It accepts the CHE's suggestion in *Towards a New Higher Education Landscape* (CHE, 2000: 44) that higher education programmes exist on a continuum running from 'provision purely at a distance to provision that is purely face-to-face'. The implication of the above is that it becomes extremely difficult to identify at which point of the continuum many programmes sit, and hence how they might be categorised.

Furthermore, other research has identified the ever-growing diversity of education practices, from distributed lecturing systems using video-conferencing to systems using well-designed study guides and decentralised tutorial support, which are clustered under the 'catch-all' phrase *distance education*.

Within this complex terrain, and taking the Minister of Education's request as the point of departure, the specific aims of the investigation were to:

1) Develop a shared understanding of the changing nature of distance education and its costs and role in higher education, and attempt to circumscribe what is being referred to as 'distance education'.
2) Develop guidelines for role differentiation in the distance education sector.
3) Recommend defensible and durable conditions and criteria relating to distance education provision, for the Ministry to use in guiding the programme mix at South African public higher education institutions. This will be based in part on an agreement with the Higher Education Quality Committee (HEQC) on criteria for quality distance education provision and their role in assuring these.
4) Propose ways in which distance education might be funded.
5) Recommend mechanisms to harness the best expertise in the country to develop high quality learning resources for widespread use in the higher education sector.

PRINCIPLES UNDERPINNING THE CHE INVESTIGATION AND ADVICE

The CHE investigation and advice to the Minister seeks to give practical expression to the vision, articulated in the White Paper (DoE, 1997: 1.14), of a system of education that will:

- Promote equity of access and fair chances of success to all who are seeking to realise their potential through higher education, while eradicating all forms of unfair discrimination and advancing redress for past inequalities;
- Meet, through well-planned and coordinated teaching, learning and research programmes, national development needs, including the high skilled employment needs presented by a growing economy operating in a global environment;
- Support a democratic ethos and a culture of human rights by educational programmes and practices conducive to critical discourse and creative thinking, cultural tolerance, and a common commitment to a humane, non-racist and non-sexist social order; and
- Contribute to the advancement of all forms of knowledge and scholarship, and in particular address the diverse problems and demands of the local, national southern African and African contexts, and uphold rigorous standards of academic quality.

It will also attempt to realise the primary purposes of the NPHE (MoE, 2001: 6), which are to ensure that:

- The higher education system achieves the transformation objectives set out in the White Paper and is responsive to societal interests and needs;
- There is coherence in the provision of higher education at the national level;
- Limited resources are used efficiently and effectively and there is accountability for the expenditure of public funds; and
- The quality of academic programmes, including teaching and research, is improved across the system.

The investigation and research has been guided by key principles, articulated in the White Paper (DoE, 1997: 1.17–1.25), that should guide the process of transformation and development in higher education. These are:

- Equity and redress;
- Democratisation;
- Development;
- Quality;
- Effectiveness and efficiency;
- Academic freedom;
- Institutional autonomy; and
- Public accountability.

UNDERTAKING THE INVESTIGATION

A CHE Task Team – comprising CHE members, South African academics with special expertise and experience in distance education, and international distance education specialists – was established to oversee the investigation leading to this research report.

The task team members were as follows:

- CHE members
  - Prof. Stef Coetzee
  - Ms Jennifer Glennie
  - Prof. Saleem Badat (CEO, CHE)
  - Dr Mala Singh (Executive Director, HEQC)

- South Africa
  - Prof. Narend Baijnath — Deputy Vice-Chancellor, Technikon Southern Africa
  - Prof. Antony Melck — Special Advisor, University of Pretoria
  - Ms Evelyn Nonyongo — Head of Institute for Continuing Education, University of South Africa

- International
  - Dr Gajaraj Dhanarajan — President, Commonwealth of Learning, also former Vice-Chancellor of Hong Kong Open University
  - Dr Olugbemire Jegede — Head of the Centre for Research into Distance and Open Learning (Hong Kong), seconded to set up the Nigerian Open University

The CHE CEO, Prof. Saleem Badat, acted as the supervisor of the investigation, supported by a project administrator, Ms Chantal Dwyer.

A diverse range of activities was undertaken by the Task Team. The South African Institute for Distance Education (SAIDE) was commissioned to support the Task Team in various ways, including conducting research on specific issues. Various local and international researchers were contracted to carry out research on specific issues. There were workshops, seminars, and meetings involving higher education institutions, stakeholders, and distance education specialists. Overall, the following 10 key activities and processes were undertaken.

Background papers

Six background papers were produced during the course of the investigation into distance education. The titles of these papers are listed in Appendix 4. In addition, an analysis of current distance education provision was conducted using information from the Higher Education Management Information System (HEMIS).

Stakeholder submissions to the CHE

All higher education institutions and other stakeholders were invited to prepare submissions to be presented to the CHE Task Team. These focused on analysis of the changing role and nature of distance education with special reference to access in the light of global trends

towards lifelong learning and the new information and communications technologies (ICT). A total of 24 higher education institutions and related organisations presented submissions to the CHE task team on 13 and 14 May 2003. Key findings and perspectives from the presentations and written submissions were then synthesised.

Case studies

Ten case studies of distance education programmes and courses were conducted, whose purpose was to:

- Profile different distance education practices in higher education provision;
- Provide detailed information about costs of distance education provision; and
- Help to identify important quality criteria to be included in the HEQC's programme accreditation and evaluation process.

A sample embracing different kinds of practices in distance education was selected for this purpose. A brief summary of the salient features of each case study, as well as an analysis of findings, has been prepared.

Research on international perspectives on distance education provision

Research on distance education in the following six countries was undertaken: Brazil, Malaysia, Indonesia, India, Pakistan, and Sri Lanka. Countries with similar socio-economic profiles to South Africa were specifically chosen. Key findings from the country case studies were then synthesised.

Proposals on assuring quality in distance education

A key concern has been the need for decisive action to deal with both quality control and quality improvement imperatives for distance education programmes. To this end, various strategies were developed in interaction with the HEQC. Three documents were produced to give practical expression to the proposed strategies:

- Criteria for quality distance education in South Africa;
- Minimum targets for distance education in South Africa; and
- Provider readiness to offer programmes using distance education and/or electronic learning methods;

Proposals on funding distance education

As part of the case studies, a financial questionnaire that examined the cost-drivers of the ten courses was administered. The data, together with an analysis of the financial logic of

distance education, was then used to inform various funding options that contribute to the formulation of proposals made on the funding of distance education.

Proposals on developing and sharing quality learning resources in South African higher education

Key to this process was a two-day workshop with academics from a variety of institutions (held on 29–30 May 2003 in Johannesburg). Its purpose was to reflect on local and international practice and brainstorm possible models for use in South Africa. The approaches distilled from this workshop, as well as comparative international research, have informed our proposals.

Selected bibliography

In order to support the CHE investigation and research, a selected bibliography on useful research resources for this project has been compiled. Literature was collected on the following issues:

- Concepts and terminology;
- Changing nature and roles of distance education;
- Institutional forms and players;
- Regulation of distance education provision (with a focus on international examples); and
- Funding of distance education.

Seminar with international distance education specialists in Cambridge

The United Kingdom Department for International Development supported a seminar in Cambridge, England, to coincide with a biennial conference on distance education organised by the Commonwealth of Learning and the British Open University. The seminar was held from 26–28 September 2003. It entailed members from the CHE Task Team and research support personnel meeting with international distance education specialists to:

- Discuss the CHE Task Team's thinking, approach, and proposals on those issues and areas in distance education provision on which the Minister of Education requested advice; and
- Identify issues and areas on which there is broad consensus on the conceptualisations, approaches, and proposals of the Task Team, as well as areas on which re-thinking, development, and refinement was required.

Other stakeholder engagements

Important engagements were conducted with officials in the Planning Directorate of the Higher Education Branch of the national Department of Education (DoE) to clarify their

concerns regarding aspects of distance education provision and their views on the nature and role of distance education provision and the financing and funding of distance education.

RESEARCH REPORT AND POLICY ADVICE REPORT

The research report comprises a number of chapters drawn from the synthesis of the investigation and research that was commissioned by the CHE Task Team. On the basis of this report, the main findings, conclusions, and recommendations have been drawn out in a policy advice report, which the CHE will present to the Minister.

DISTANCE EDUCATION IN SOUTH AFRICAN HIGHER EDUCATION

INTRODUCTION

Distance education represents a major component of higher education provision in South Africa. In 2001, 29% of all full-time equivalent (FTE)[1] students in public institutions, or 43% of all headcount students, were enrolled in declared distance education programmes. This is very much in line with data analysed from six case studies of countries with a similar socio-economic profile to South Africa.[2] It shows that the use of distance education in higher education has, with one exception (Brazil), significantly increased access to higher education, accounting for between 10% and 30% of higher education. (See Background Paper 1.) As can be seen, the top-end figure is similar to that of South Africa. Put differently, in 2001 distance education provision was responsible for increasing participation from just over 379 000 headcount enrolments to over 665 000. This represents a 75% increase in headcount participation on account of distance education in South Africa.[3] Given that it is sometimes difficult to determine who is a distance student, a matter to which we will return later, and given that, by declaring students to be distance education students, institutions receive a lower subsidy from the state, these figures are almost certainly understated, especially in graduate study. The distance education sector is thus clearly of major significance to higher education.

This chapter will give a brief overview of the development of distance education provision in South African higher education, followed by an identification of the general characteristics of that provision. The chapter will then explore the evolution of policy since 1994, in terms of a number of key themes and issues.

DEVELOPMENT OF PROVISION

Formally, distance education provision in South African public higher education began in 1946 with the declaration of the University of South Africa (UNISA) as one of the world's first correspondence universities. Distance education in the technikon sector developed from 1980 with the founding of TSA (Technikon Southern Africa) as a dedicated distance education technikon. Soon after, in 1981, the newly founded Vista University opened a distance education 'campus' named VUDEC, targeting in particular in-service teachers. In addition, colleges of education in three of the four provinces in South Africa at the time began offering distance education programmes.

1 Full-time equivalent (FTE) student enrolments are calculated (a) by assigning to each course a fraction representing the weighting it has in the curriculum of a qualification, and (b) by multiplying the headcount enrolment of that course by this fraction.
2 The six countries comprising the international case study were Brazil, India, Pakistan, Sri Lanka, Malaysia, and Indonesia.
3 These figures are taken from the 2001 HEMIS database as at 15.11.2001, and draw on reports submitted to the Department of Education by higher education institutions. In these reports, institutions are required to make a distinction between contact and distance students.

From 1993, a number of traditionally face-to-face[4] universities embarked on distance education. This was in alignment with the 1992 Educational Renewal Strategy of the apartheid state which emphasised that 'there should be no absolute separation between distance education and contact tuition, but that there is a spectrum of possibilities in this regard'. It further proposed that there should be no monopoly of distance education by specific institutions (Department of Education, 1992: 30).

By 2001, UNISA had grown to 133,555 headcount (58 992 FTE) students, thus forming 21% of university FTE students. Vista had 7 924 headcount distance education enrolments, or 5 144 FTE students. Nine other universities were involved in distance education together comprising 23 756 FTEs. All the colleges of education had been incorporated into the universities by this date.

At TSA, in 2001, there were 61 785 headcount enrolments or 33 187 FTE students, forming 22% of technikon full-time equivalent students. Two other technikons had a further 5 542 FTE distance education students.

With regard to private higher education, there is no comprehensive information available. However, it is clear that much private distance provision is offered in partnership with public institutions and is thus accounted for in the analysis of public provision. The recent Human Sciences Research Council's HRD Review (2003) analysed information from the DoE on 86 registered private providers in 2001, and concluded that there were only some 30 000 headcount enrolments for 'own certificates' (HSRC, 2003: 421) in both distance and face-to-face provision. It can thus be safely concluded that distance education in the private higher education sector is currently of limited significance.

GENERAL CHARACTERISTICS OF PROVISION IN 2001

It is useful to highlight various characteristics of distance education provision. Given that the vast majority of students in distance education study part-time, use has been made in what follows of the DoE's notion of full-time equivalent (FTE) enrolments. Use of FTEs makes comparisons with face-to-face provision more meaningful.[5]

The following general characteristics can be discerned. Distance education is:

- Dominated by the dedicated distance education institutions;
- Concentrated in Education, Economics and Management Sciences, and the Humanities; and
- Primarily at first qualification level.

4 For the purposes of this report, the term *face-to-face* and not *contact* is used to distinguish between the types of institutions. The reason for this is that many institutions use the term *contact* to denote the fact that although their delivery of programmes makes use of distance methods, they make *contact* with their students by various means, such as telephone and e-mail. However, where DOE statistics are used, their term 'contact' is used.

5 *Education Statistics in South Africa at a Glance in 2001*, DoE, 2003 points out that the ratio of FTE to headcount enrolments in 'contact' institutions was 8:10 compared to 4.4:10 for distance education.

Each of these characteristics is discussed in more detail below.

Domination by the dedicated distance education institutions

Universities

In 2001, UNISA (58 833) and Vista-Vudec (5 144) together formed 73% of the declared distance education university full-time equivalent enrolments (87 733). The table below shows the number of distance FTEs at traditionally face-to-face institutions, as well as the percentage of provision which distance education comprises at that institution.

Table 1: Distance education at predominantly face-to-face universities in 2001

Institution	*Distance education head counts*	*Distance FTEs*	*Total FTEs*	*Distance FTE as % of total FTEs*
University of Potchefstroom	9 769	5 219	16 228	32.16
University of Port Elizabeth	15 731	2 333	8 422	27.70
University of Fort Hare	1 572	1 468	5 493	26.72
University of Pretoria	30 232	6 084	30 786	19.76
University of Natal	6 444	3 576	19 459	18.38
Rand Afrikaans University	5 453	2 737	14 908	18.36
University of the Free State	1 523	1 129	11 140	10.13
University of Stellenbosch	2 019	992	16 264	6.10
Rhodes University	339	218	5 061	4.31
Other face-to-face universities	0	0	89 004	0.00
Total	73 084	23 756	216 766	10.96

Technikons

In the technikon sector, Technikon Southern Africa comprised 88% of declared distance education with 33 187 FTEs in 2001. Pretoria Technikon (5 476) and three others (67) had the remaining FTEs.

Concentration in education, economics and management sciences, and the humanities

Table 2 below shows the comparison between face-to-face and distance provision at universities. In the table, FTEs have been rounded to the nearest 100 and percentages to the nearest unit. Of significance is that, in Education, distance FTEs (23 000) are substantially larger than FTEs in face-to-face provision (14 200) in 2001, while, in Economic and Management Sciences, distance education provision (23 700) is only 23.4% less than face-to-face provision (30 900).

Table 2 also shows that distance education provision at universities has grown in Education and Economic and Management Sciences by about 25% from 1999 to 2001, but has shrunk in the Social Sciences and Humanities by about 18% from about 29 800 in 1999 to 24 400 in 2001.

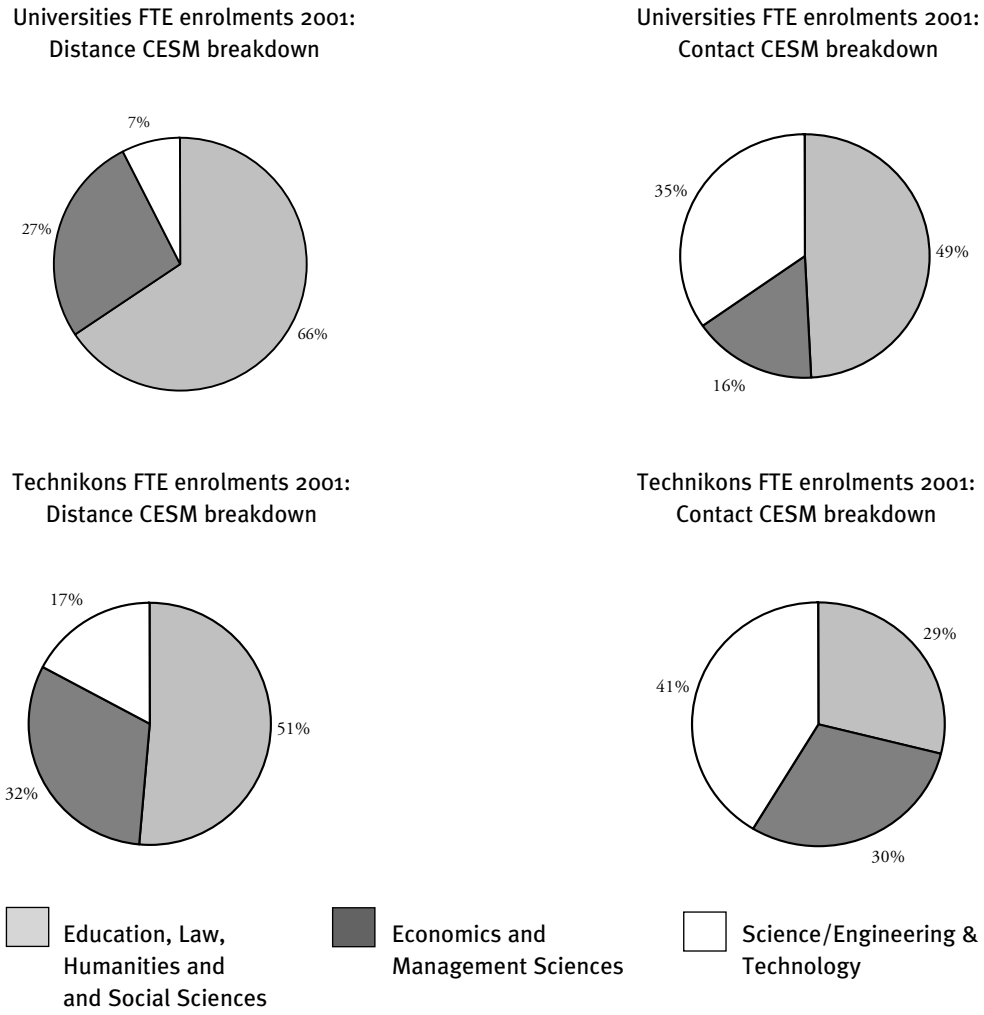
Table 2: FTE enrolments in different fields of study at universities

Field	*1999 Contact*	*2000 Contact*	*2001 Contact*	*1999 Distance*	*2000 Distance*	*2001 Distance*
Science and Technology	39 600 21%	41 500 24%	46 600 24%	4 800 6%	4 400 6%	5 600 6%
Health	18 100 10%	19 100 11%	20 500 11%	1 200 2%	1 100 1%	900 1%
Economic and Management Sciences	20 600 11%	26 000 15%	30 900 16%	18 800 23%	20 600 26%	23 700 27%
Education	11 300 6%	11 500 7%	14 200 7%	18 700 23%	19 400 24%	23 000 26%
Law	18 700 10%	18 400 10%	19 100 10%	8 600 11%	9 200 12%	10 000 11%
Social Sciences & Humanities	65 300 34%	58 300 33%	61 400 32%	29 800 36%	24 500 31%	24 400 28%
Other	15 900 8%	0 0%	200 0%	0 0%	0 0%	0 0%

Table 2 shows that a relatively small proportion of distance education provision is in Science and Technology and Health, with only 6 500 FTEs at universities in 2001 (comprising 7% of distance education university provision). At technikons, this figure is 7 372 FTEs (comprising some 17% of distance education technikon provision) in 2001. Given that it is more difficult for distance education programmes to organise the practical work necessary for study in the sciences, it is to be expected that enrolment proportions would be lower than in face-to-face programmes. Nevertheless, it seems fair to conclude that the current proportion of science enrolments in distance education remains unacceptably low.

This means that patterns of distance education provision differ markedly from the target ratios set by the national department of 40:30:30 for Humanities and Social Sciences: Economic and Management Sciences: Science, Engineering and Technology. The pie charts in Figure 1 below show the ratios for different fields of study at universities and technikons.

Figure 1: Ratios for different fields of study in 2001



A further breakdown of distance education provision shows that distance education provision in the dedicated distance institutions and the traditionally face-to-face institutions differ. Provision in the latter is largely focused on Education, with over 75% of distance education FTEs at these universities being in education. However, Economic and Management Sciences FTEs have increased markedly over the last few years.

Primarily at first qualification level

Figure 2 below shows that, as for face-to-face provision, over 80% of FTEs in distance education are to be found at degree or lower undergraduate level at universities, with a larger concentration on lower undergraduate provision in distance education – 12 761 FTEs or 14.56% of provision compared to 8 727 FTEs or 4.52% in face-to-face provision. Much of this lower undergraduate level of provision is in the field of Education (65%) and is provided by the traditionally face-to-face institutions.

Figure 2: FTE enrolments at different levels at universities

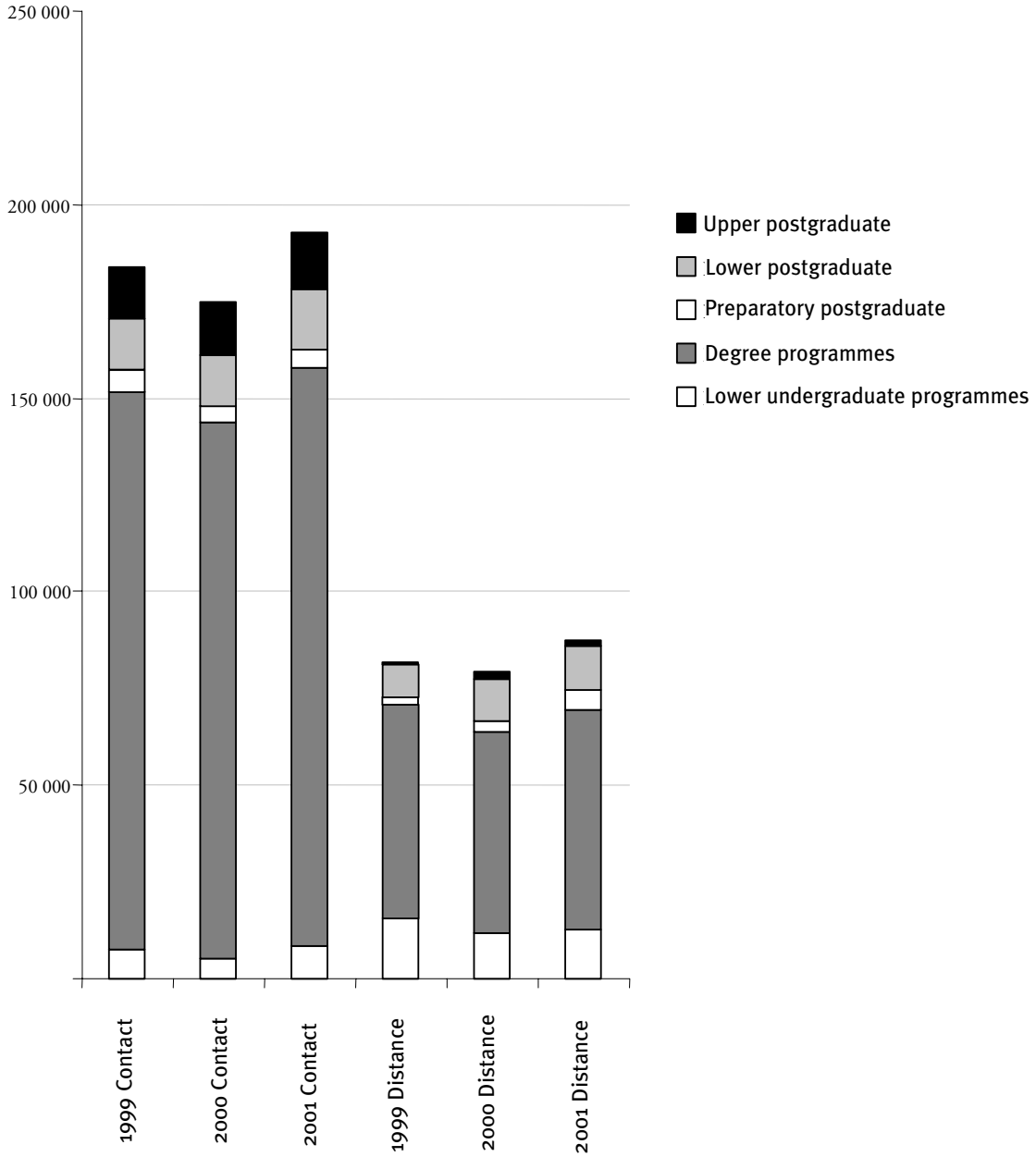
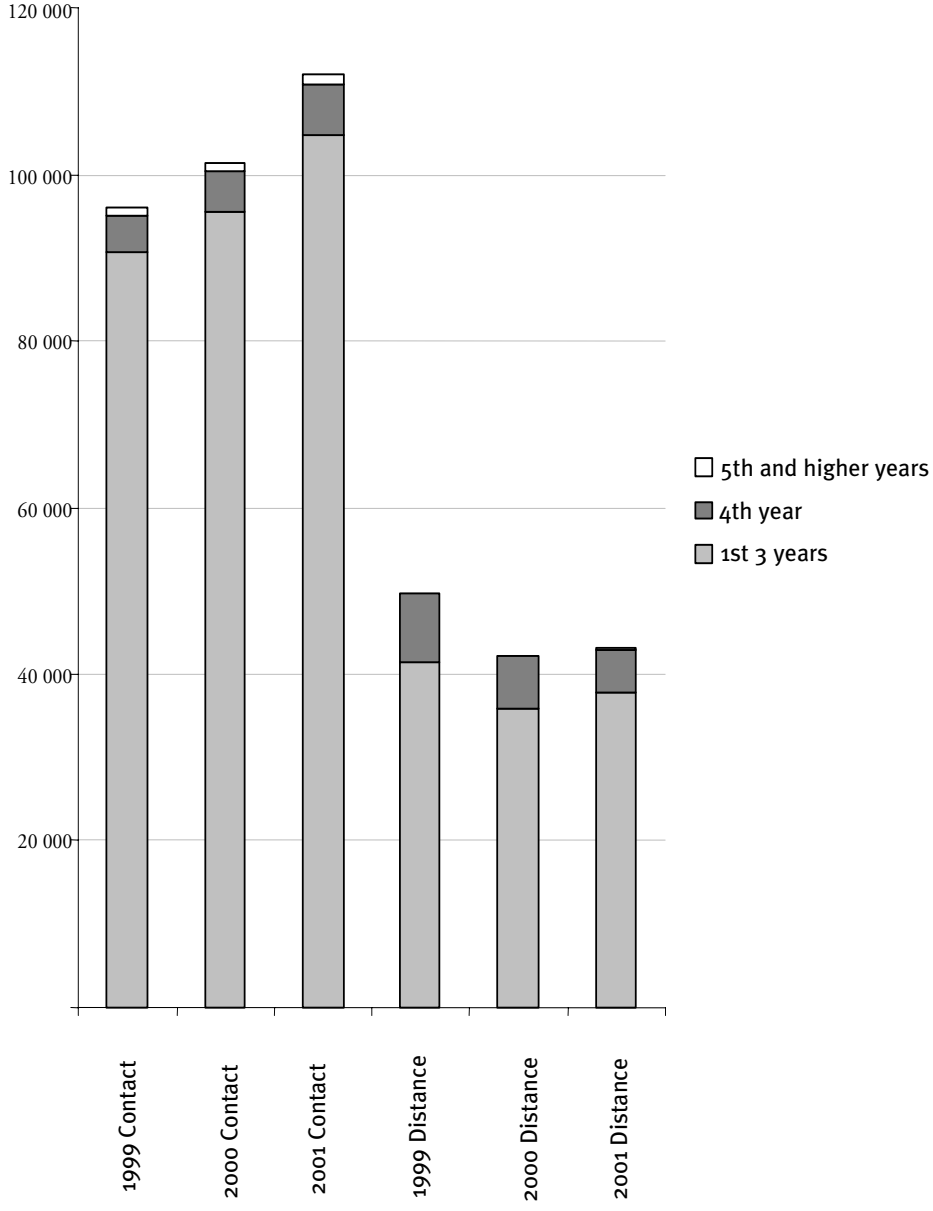


Figure 3 shows that, in 2001, 87.44% of distance provision at technikons was at the first qualification level compared to 94% in face-to-face provision. A higher proportion in distance education is found at 4th year level (12.21% for distance education compared to 5.24% for face-to-face provision in 2001).

Figure 3: FTE enrolments at different levels at technikons



Given that distance education provision forms such a major component of provision, it is not surprising that every policy document in higher education touches on it. The next section examines the themes which run through these policy documents.

KEY POLICY ISSUES IN DISTANCE EDUCATION SINCE 1994

Introduction

Since 1994, across the various policy documents affecting higher education, a number of key themes around distance education recur:

- The key role distance education should play in increasing participation and access;
- The importance of cost-effectiveness of distance education in an environment of limited resources;
- The notion of a single dedicated distance education institution;
- The distinction between distance education and face-to-face education;
- Grave concern about the quality of distance education at both the dedicated distance education institutions and the predominantly face-to-face institutions;
- The need for collaboration in course design and development; and
- The potential of a network of learning centres throughout South Africa.

(See Background Paper 2: Overview and Analysis of Distance Education Policy in South Africa by Thandi Ngengebule.)

Each of these themes will be elaborated on below.

Participation and success

In 1994, the African National Congress (ANC) document: *A Policy Framework for Education and Training* outlined a vision of a future 'well-designed and quality distance education system based on the principles of open learning' (ANC, 1994: 78) that would contribute to increased access to South Africa's newly enfranchised majority, as well as provide opportunities for redress. The need to expand access to higher education was prioritised, as was a commitment to an open learning approach:

> Part-time studies and distance education will be provided both through specialised institutions and existing institutions of Higher Education. Strong support will be given to institutions which seek to develop systems of open-learning and multi-media distance education. (DoE, 1995: 28)

The ANC commissioned a review of current distance education that would also propose ways in which distance education could contribute integrally to the proposed education and training system. This review was carried out in early 1994 by an international team of

experts.[6] It identified a major role that distance education could play in the transformation of education in South Africa.

The 1995 *White Paper on Education and Training*, the first policy statement on education from the newly elected government, took up this theme, stating:

> The dimensions of South Africa's learning deficit are so vast in relation to the needs of the people, the constitutional guarantee of the right to basic education, and the severe financial constraints on infrastructural development on a large scale, that a completely fresh approach is required to the provision of learning opportunities. (DoE, 1995: 28)

The term 'open learning' was understood in the White Paper as follows:

> Open learning is an approach which combines the principles of learner centredness, lifelong learning, flexibility of learning provision, the removal of barriers to access learning, the recognition for credit of prior learning experience, the provision of learner support, the construction of learning programmes in the expectation that learners can succeed, and the maintenance of rigorous quality assurance over the design of learning materials and support systems.
>
> South Africa is able to gain from worldwide experience over several decades in the development of innovative methods of education, including the use of guided self-study, and the appropriate use of a variety of media, which give practical expression to open learning principles. (DoE, 1995: 28)

Meanwhile, early in 1995, a presidential proclamation established a National Commission on Higher Education (NCHE) to advise government on issues concerning the restructuring of higher education. The Commission was required to formulate a vision and policy proposals to ensure the development of a well-planned, integrated, high quality system of higher education and the vision and policy needed to address inefficiencies and unjust regularities inherited from the apartheid era, and to respond to the new social cultural and economic demands.

The NCHE advocated substantially increased participation rates in higher education, and cited the role that distance education and resource-based learning would play in such an expansion. It proposed that while face-to-face university and technikon enrolments should grow by 2.5% and 6% a year respectively, distance education should grow by 5% a year at universities and 8% at technikons. It also emphasised the role that resource-based learning and distance education could play with respect to the principle of redress as it applies to those previously denied higher education opportunities, as well as their role in meeting the

6 The team was chaired by Dr G Dhanarajan, then Director of the Open Learning Institute of Hong Kong and now president of the Commonwealth of Learning and advised by Dr G Reddy, then chairperson of India's University Grants Commission and former Vice-Chancellor of Indira Gandhi Open University.

growing economic and other imperatives for flexible lifelong opportunities. (NCHE, 1996: 95, 119)

Echoing the sentiments of the 1995 White Paper, White Paper 3: *A Programme for the Transformation of Higher Education* (DoE, 1997) endorsed the notion that distance education and on-campus resource-based learning have a crucial role to play in addressing the challenges of expanding access, diversifying the body of learners, being responsive to the needs of non-traditional students, for example, those already in employment or who need to earn in order to meet study costs, and enhancing quality within the context of limited resources (DoE: 26).

Thus, it is clear that the new South African government anticipated that there would be, and indeed sought to encourage, massification of the higher education system. This, together with international trends towards lifelong learning, resulted in high expectations in policy on the role distance education might play across the system in increasing access and cost-effectiveness.

The Ministry of Education's National Plan for Higher Education (MoE, 2001), formulated partially in response to the Council on Higher Education's *Towards a New Higher Education Landscape* (CHE, 2000), notes, however, that despite a clear need for the higher education system to produce more graduates in particular fields enrolment levels had not increased as expected and participation rates had actually declined between 1996 and 2000. This was in spite of the huge increase in distance education at predominantly face-to-face institutions. Further cause for concern was a decline in retention rates, as well as a large proportion of students not 'completing their studies' (MoE, 2001: 19–21). Targets were revised for participation rates and set for the first time for graduation rates and ratios for enrolment among different fields of study, thus dramatically refining the notion of increased participation. With regard to the notion of access for groups previously marginalised, the report has a separate outcome on 'broadening the social base of students', emphasising in particular workers, mature learners, and the disabled (MoE, 2001: 28). No special mention is made of the role of distance education in this regard, perhaps because of the Ministry's concern expressed later in their report on the quality of distance education provision. (See below.)

Cost effectiveness

Particular emphasis was placed on the cost-effectiveness of distance education in the NCHE report (NCHE, 1996). It gave as its reason for proposing to expand distance education more than 'contact' education the relatively lower 'cost per qualifier' in distance education institutions (NCHE, 1996: 95). It comments further that:

> In the context of limited resources, there are significant barriers to providing enhanced opportunities for access and success at traditional contact institutions. First, the organisation of teaching depends primarily on academic staff as the communicators of the syllabus and the face-to-face managers of student learning – unless staffing levels increase as enrolments increase, quality and/or success declines. Second, expensive plant

> and infrastructure is typically underutilized. Third, the current academic year for most undergraduate programmes is not designed for students to study consistently throughout the year – in this sense most students are studying part-time. (NCHE, 1996: 119)

It goes on to suggest that increased use of resource-based learning and distance education would contribute to more efficiency in the use of resources.

It expresses concern about the 'efficacy, appropriateness and cost-effectiveness of current distance education provision', commenting in particular on the 'many distance education courses which enrol limited numbers of students thus negating the potential economies of scale that could be achieved and which would make the high initial investment in quality course material cost-effective' (NCHE, 1996: 120).

The White Paper on Higher Education, as its first comment on distance education, spoke of the challenge to expand access, diversify the body of learners, and enhance quality, in the context of resource constraints. It encouraged resource-based learning and distance education throughout the higher education system, as, it argued, 'the quality and success of teaching need not be dependent upon staff levels rising in tandem with increased enrolments. In other words … better use can be made of scarce and costly physical resources, scholarship and teaching expertise' (DoE, 1997: 26). The White Paper did, however, caution about the efficiency and effectiveness of much current distance education provision (DoE, 1997: 27).

The CHE report entitled *Towards a New Higher Education Landscape* (2000: 44) noted that, because some distance education programmes were very small, they did not achieve the economies of scale achieved by large programmes. It urged collaboration across the sector, especially around the development of learning resources. The NPHE (2001) cites economies of scale as one of its motivations for establishing the single dedicated distance education institution, referring in particular to the expense of the rapidly changing and expensive information and communication technologies (MoE, 2001: 63).

A single dedicated distance education institution

The idea of a single dedicated distance education institution first emerged in policy documents in the NCHE report (1996) as follows:

> The Commission has a clear vision of a single distance education institution that offers high quality distance education programmes to very large numbers of students and coordinates the production of high quality resource-based courses and course materials for core certificate, diploma and first degree programmes, which are widely and cheaply available to a broad range of providers. (NCHE, 1996: 122)

The idea was not pursued at all in the White Paper on Higher Education (1997), which rather proposed developing a coherent national framework for facilitating distance education and

resource-based learning (DoE, 1997:27). The CHE's report, *Towards a New Higher Education Landscape*, however, resurrected the idea, being of the view that a 'single predominantly dedicated distance institution that provides innovative and quality programmes, especially at undergraduate level, is required for the country' (CHE, 2000: 45). The CHE advised that 'the Minister should establish a Working Group to investigate integrating the current dedicated distance education institutions in South Africa' (CHE, 2000: 45).

The Ministry of Education's subsequent NPHE Report of 2001 noted the CHE's notion of a merged dedicated distance education institution, overlooked its proposal for an investigation, and announced the founding of a single merged institution.

A Ministerial Working Group was established in 2001 to facilitate the merger. It was required to advise on the role of the single institution and to develop a merger plan. On account of a range of political challenges, it was unable to entirely fulfill its mandate. It did produce a document outlining a draft statement on the role of the new institution, and developed structures and produced information useful to the merger process. The merger was announced in the Government Gazette to take place in January 2004.

Distinctions between distance and 'contact' education

As mentioned earlier, the Education Renewal Strategy of 1992 had already emphasised that there should be 'no absolute separation between distance education and contact tuition, but there is a spectrum of possibilities in this regard' (DoE, 1992: 30). The 1996 NCHE Report also noted international experience:

> The sharp distinction between contact and distance education institutions is becoming increasingly blurred as both types of institutions move towards a primary focus on designing learning environments. Different institutions, and different programmes within them, will draw on different technologies appropriate for particular educational purposes, student needs and contexts. The emergence of 'dual mode' (a mix of distance and contact students) and 'mixed mode' (individual students mixing distance and contact learning) institutions reflects this blurring, and is an important indication of a move towards open and lifelong learning opportunities. (NCHE, 1996: 120)

The 1997 White Paper stipulates that contact and distance education institutions will be encouraged to provide effective and flexible learning environments on a continuum of educational provision, in which educators will be able to select from an increasing range of educational methods and technologies those that are most appropriate to the context within which they operate.

The CHE (2000) suggests cautiously that there could be a need to introduce the notion of a continuum of education provision for planning purposes and notes that:

> This continuum would have, as two poles, provision purely at a distance and provision that is solely face-to-face. In reality, all education provision could increasingly exist somewhere on this continuum. The crucial issue is the nature of learning and the social and educational value of a programme's content. (CHE, 2000: 44)

It relates this development of the continuum to exponential growth in information and communication technologies and their impact on the availability of a wide variety of educational delivery strategies. It also suggests that the value of new technologies should not be overestimated.

The NPHE (2001) echoed this sentiment, and is sceptical of the worth of virtual universities, especially those related to multinational telecommunications companies. It expresses concern about the impact of the growth of distance education at 'contact' institutions on the sustainability of the dedicated distance education institutions (DoE, 2001: 60–61).

Concerns about the quality of distance education

Since 1994, a number of policy documents have commented negatively on the quality of distance education, beginning with the ANC Policy document of 1994, which described current provision as 'based on an outmoded and very limited conception of what distance education is' (ANC, 1994: 77). This was followed by findings from the International Commission on Open Learning and Distance Education (1995), which described current provision at the dedicated distance education institutions as follows:

> What in South Africa is called distance education is essentially correspondence education. With very little assistance other than from study materials, extramural students sit an institution's examinations and, depending on their success, proceed toward the completion of certificates, diplomas or degrees. Considered as distance teaching, virtually everything depends on the quality of the study materials prepared by lecturers in each institution for student use. With few exceptions, these are of inferior quality. (SAIDE, 1995: xxi)

It demonstrated that throughput rates determined by tracing cohorts of students over nine years were extremely low.

These findings were followed by the NCHE (1996: 120), which also commented on low throughput, especially in science and technology, and the lack of tutorial and other forms of learner support. Both reports made a strong case for transformation of all distance institutions in South Africa away from current practices of inaccessible texts with little or no student support towards more pedagogically sound approaches.

The White Paper on Higher Education (1997), took up the theme, noting 'the Ministry of Education is concerned about the efficiency, appropriateness and effectiveness of much current distance education provision' (DoE, 1997: 27) and notes 'that there is much work to

do to re-focus institutional missions, modernise courseware, improve student support, and to undertake essential efficiency reforms and cost effective planning so that quality of provision and performance is improved' (DoE, 1997: 27).

Quality of distance education provision at predominantly face-to-face institutions first came under the spotlight through an audit of Teacher Education at a distance conducted for the Department of Education. It recommended various measures to limit rapid and uncontrolled expansion of low quality education, especially through public-private partnerships (SAIDE, 1995: 170). Concern about this expansion of low quality provision finally led the DoE to place a blanket moratorium on all new distance education programmes at face-to-face institutions in 1999/2000.

While the CHE's *Towards a New Higher Education Landscape* (CHE, 2000: 44) also noted its concern for this opportunistic expansion, it proposed that the moratorium be lifted. It instead proposed the 'development of a clear policy directive, including conditions and criteria, for the continued provision of large-scale distance education programmes by traditionally contact institutions. For example, the Department of Education could stipulate that to introduce any large-scale (say, more than 500 enrolments) distance learning programmes, institutions should prove that there is a demonstrated need for such a programme and that appropriate quality assurance mechanisms are in place' (CHE, 2000: 44). The CHE also recommended that 'priority be given by the HEQC to the quality assurance of such large-scale predominately distance programmes' (CHE, 2000: 44).

The NPHE takes up this proposal, although it applies it to all such programmes and not only the large-scale ones (MoE, 2001: 62). It also requests the HEQC to 'review the quality of distance programmes in contact institutions as a matter of priority' (MoE, 2001: 68).

More recently, in a DoE circular on HEMIS, it is made clear that, especially in the case of distance education, there needs to be evidence of an 'instructional service' having been 'delivered to students throughout the duration of the course' (DoE, 2003: 5) before funding will be approved.

The above illustrates ongoing concern about the quality of distance education at both the dedicated distance education and predominantly face-to-face institutions, although the emphasis has shifted over time.

Learning resources

The NCHE (1996) accorded great importance to the development of high quality course materials, suggesting that it should be a national project to draw in all available expertise and capacity, and ensure that quality materials become rapidly and widely available in priority levels and fields of learning. It further proposed that the development should be funded from earmarked funds. The NCHE expected that such development of quality learning materials

would have a significant impact on the quality of education across the system (NCHE, 1996: 122). It then suggested that its proposed new single dedicated distance institution should coordinate the process via a consortium (NCHE, 1996: 123).

The White Paper (1997) took up the concept but proposed a different implementation strategy. It supported:

> The development of a national network of centres of innovation in course design and development as this would enable the development and franchising of well-designed, quality and cost-effective learning resources and courses, building on the expertise and experience of top quality scholars and educators in different parts of the country. (DoE, 1997: 27)

The NHPE re-emphasised this notion in the context of addressing the need to transform distance education provision (MoE, 2001: 61). The Ministry then requested the Working Group on Distance Education to take the issue forward, but, on account of difficulties faced by the Group, the task was then transferred to the CHE.

Learning centres

The 1994 ANC Policy Document proposed a pilot project as the basis for establishing a national network of learning centres 'to support open learning' (ANC, 1994: 79). The NCHE urged that 'urgent steps' be taken, in conjunction with provinces, to establish a national network of learning centres that would be 'focal points for learner support activities associated with distance education programmes' (NCHE, 1996: 124). The White Paper on Higher Education makes indirect reference to the idea, suggesting that it, 'together with the move by contact institutions into more flexible modes of delivery, will not only broaden access but also facilitate and enhance quality education, especially in rural areas' (DoE, 1997: 27). The NPHE also takes up the idea indirectly, suggesting that 'developing a national network of learning centres, which would facilitate access and coordinate learner support systems' (MoE, 2001: 63) would be one of the advantages of the establishment of the single dedicated distance education institution.

Although beyond the remit of the CHE investigation, the issue of learning centres was raised by a number of stakeholders and specifically by South African Universities' Vice-Chancellors' Association (SAUVCA). Further reference is therefore made to the establishment of a coordinated national network of learning centres in Chapter Four under the section dealing with issues that require additional investigation.

Conclusion

The key policy themes identified above remain salient, and will be taken up and developed in the course of this research report.

PERSPECTIVES FROM THE INSTITUTIONS

INTRODUCTION

All public higher education institutions and related stakeholders were invited to prepare submissions to be presented to the CHE Task Team. The focus of these was an analysis of the changing role and nature of distance education, with special reference to access, in the light of global trends towards lifelong learning and the new information and communications technologies. A total of 24 higher education institutions and related organisations presented their submissions to the CHE Task Team on 13 and 14 May 2003. (See Appendix 1 for list of stakeholder institutions and organisations that made presentations and written submissions to the CHE Task Team). The key findings and perspectives from the presentations and written submissions were then synthesised. This chapter presents these institutional perspectives which serve to frame the analysis of distance education practice presented in Chapter Three.

Analysis of submissions reveals that there is an increasing range of programmes which incorporate distance education methods, particularly as more institutions have started to integrate use of information and communication technologies (ICTs) into their delivery strategies and as increasing numbers of institutions target non-traditional students, who require more flexible forms of delivery. A close reading of submissions does suggest, however, that proposed changes to the funding formula and current restrictions on predominantly face-to-face institutions offering programmes through distance education coloured the submissions. Institutions appeared unwilling to make critical self-reflective comment, other than making a few veiled criticisms of other institutions or posing hypothetical problems (from which they then distanced themselves). It seems unlikely that distance education in its various forms in all the universities and technikons around the country is an unqualified success, but this summary draws only on the relatively guarded ways in which institutions described themselves in answer to the questions. Richer information about specific programmes is captured in the case study reports, which have been summarised in Chapter Three.

DEFINING AND DESCRIBING DISTANCE EDUCATION

The views of institutions in presentations represented a variety of 'takes' on the definition of distance education and have resulted in the proliferation of terms. However, they represent a fair understanding of distance education as it is practised in South Africa at the moment – from correspondence style (with or without learning support), to 'contact'-rich and highly supported distance education (with or without use of ICT and other technologies).

There was a variety of approaches to, and understandings of, distance education. Few institutions actually referred to their distance education or flexible delivery programmes as 'distance education'. In some cases, this was because their flexible delivery strategies have few or no distance components to them (for example, in block release programmes). In others, though, reluctance to declare a programme as 'distance' may have arisen from a desire

to avoid lower subsidy rates granted for distance education delivery. Many providers argued that there was a high degree of contact in their various approaches, even if the contact was not face-to-face. A minority of institutions used 'resource-based learning' and 'open learning' as synonyms for 'distance education', while others used these terms as alternatives.

The term 'distance education' for most institutions and organisations implied that there was a distance between the learner and the institution/teacher – a distance that was often physical (spatial), but could also be temporal. Sometimes use of distance education methods was driven by increasing use of ICTs; in other cases it was a consequence of institutions trying to increase access to people beyond their traditional student base.

Many submissions emphasised the centrality of learning materials in distinguishing distance education from face-to-face education, arguing that quality distance education requires a very different design and development process of learning materials in order to obtain proper structuring of the learning experience and to enable a dialogue or conversation with the learner, between learners, and between the lecturer and learners. A few stressed that, in distance education, learning resources need to be more carefully designed than is necessary in face-to-face education. They argued that this is necessary to ensure that materials are accessible, to anticipate learners' questions and problems, and to scaffold learning. With regard to centrality of materials, a distinction was drawn between 'resource-based learning' and 'distance education'. In the former, the teacher was argued to have more of a role than in the latter. Only one institution did not see a difference between distance and face-to-face education in the course design process. One submission emphasised that, in distance education there is a reduced role for lecturers and a delegation of teaching to lower level staff such as tutors.

The kinds of terms used by providers for varieties of their distance education provision sometimes refer to a principled approach (for example, 'lifelong learning' or 'flexible learning') and sometimes to use of particular kinds of methods (for example, 'block release' or 'mixed mode'). Given this, it would appear useful for institutions, in referring to the kinds of distance education that they offer, to consider both approach (for example, flexibility of timetable to meet the needs of part-time students, access for people who need to work and study) and methods.

The majority of submissions stressed the blurring of the distinction between face-to-face and distance education. Submissions stressed that there could not be a monopoly in use of distance education methods, and that face-to-face institutions could not ignore the wealth of possibilities offered by mixed-mode or blended e-learning. This was seen as essential in terms of opening access and increasing graduate output. The general emphasis was that contact institutions should have freedom to use whichever modes, methods, and resources are most effective for purpose, context, and the needs of students, the region, and the programme. A few institutions stressed their desire to meet regional needs through distance education programmes. Thus, in general, emphasis was placed on the need to use all possible means to reach learners with quality and transformed teaching approaches.

It was argued by some that mechanisms to steer the system towards successful transformation cannot be based on definitions that do not reflect current reality. Thus, it was proposed that it is almost impossible – and perhaps also inappropriate – to think of distance and face-to-face education as two distinctly different modes of delivery. Instead, a few submissions suggested that one outcome of current 'transformation' processes should be an integrated higher education model incorporating both distance and face-to-face delivery modes in individual institutions. This should be encouraged rather than curtailed through macro policy frameworks and alignment mechanisms. Instead, the emphasis should be on quality assurance and cost efficiency.

A concern was expressed that, while institutions had tried to respond creatively and innovatively to needs on the ground and had developed more flexible programmes, official policy had remained static and trapped by crude definitions. Some institutions expressed anger that, in their perception, instead of rewarding responsiveness and valuing efforts to provide extensive contact and support for remote students, the Department of Education has apparently drawn distinctions between face-to-face and distance education on the basis of whether or not tuition occurred on campus. The feeling was that the realities of what is happening demand a more finely grained distinction between various forms of delivery, ranging from full contact, on campus, full-time students to 'correspondence' students. This is particularly important because of the way the funding formula currently operates. A few submissions noted, for example, that 'contact-at-a-distance' students should not be earning distance education subsidies. It was felt that the focus should be on creating increased access, equity, and educational viability for all learners and not on differentiating between modes of delivery.

Many institutions emphasised the need to stay abreast of global developments, with a view to being able to compete effectively with international institutions. South African higher education was argued to be a unique and internationally marketable commodity, suggesting that we should look beyond our borders for these markets. Some institutions felt as though their hands were tied, while 'outsiders take the prizes'. Many pointed out that over-regulation is ineffective and cost-intensive, while others stressed that it inhibits innovation. Thus, institutions felt that space must be created for an emergent model of 'off-campus' education. A decentralised system may have centralised programme development and learning material duplication systems, while providing some or all of the following services through regional or local centres: registration, student record-keeping, tutorial services, student counselling, learning outcome assessment, and student enquiry services.

Integrating ICT into education programmes

The need to distinguish between distance education and programmes which integrate ICT was stressed, as was increasing use of ICT in all modes of delivery of higher education. One institution suggested that the role of online education requires urgent consideration and

support at a policy level. It proposed that South Africa should be considering the creation of parastatal bodies to encourage and support online education.

Perhaps because of these trends, there seems to have been a proliferation of terms to describe distance education. Similarly, many submissions were characterised by the use of superlatives and hyperbole. The integration of ICT, in particular, seems to have been described in exaggerated terms: 'highly innovative', 'sophisticated', 'resource-rich', 'multi-directional dynamic interactions', and 'holistic' are just a sample of the language used when discussing this topic. Terms used were sometimes also obscure. While it is appreciated that institutions are enthusiastic about innovative forms of delivery and want to make a (probably legitimate) case for equitable funding, use of such language makes it difficult to get a meaningful sense of their actual practice.

Many submissions seemed to focus on beliefs about what technology could achieve in theory, rather than actual experience of introducing it in programmes. For example, it was argued by one institution that technology allows students more freedom to study at any pace, from anywhere, and at any time. This seems problematic, as it is more likely that design and organisation of a learning programme, and not technology, is what will allow this freedom, although, of course, strategic use of ICT can enhance this design and organisation.

Various submissions tried to distinguish between courses which in some way used ICT, those in which ICT is integrated, and web-based or digitally delivered courses. Terms suggested were 'adjunct mode', 'mixed mode', 'online mode', 'technology-supplemented', 'technology-enhanced', 'technology-integrated', and 'technology-based'. However, few institutions gave any sense of what such terms mean in practice. There was, however, a clear trend towards increased integration of ICT into both distance education and face-to-face programmes. A few institutions had examples of distance education programmes that were delivered entirely using ICT. More often, however, there was reference to use of ICT or satellite broadcasts as an aspect of distance education programmes. Increased use of ICTs has often resulted in providers moving into distance education without realising it. Where this has happened, it has largely been propelled by student demand and has been a natural process. This means that provision needs to be made for such developments, and there should be some flexibility regarding who may, or may not, offer distance education.

Some institutions cited ways in which ICT has improved both distance and face-to-face programmes. One way in which this was claimed to have happened is through greater focus on instructional design. For example, one institution stated that study material developed for distance education students was being used for on-campus students as well. Others felt that, because lecturers are given support in development of 'virtual classrooms', they are provided space to interrogate their own 'common sense' notions of teaching and learning, derived from their experiences of transmission-oriented delivery. As a result, they are now re-orienting their 'paper-based material' to be oriented to active individual and group activity. The fact that they had to make a case for introducing distance education methods to the governing structure forced them to reflect on methodologies, and probably improved the quality of

teaching. Likewise, another institution argued that the introduction of ICT had meant that academic planning had improved for all programmes, because these now had to be developed in advance. Introduction of ICT was also said to have enabled students on face-to-face programmes to become more independent learners. Technology was seen to be important in enhancing flexibility since it enables students to be less bound by time and place. Finally, use of ICT in improving administrative systems was often cited as a further benefit.

In relation to ICT and online education, a few institutions stressed the need for a cost-effective bandwidth. Their view was that, to increase use of technology, a special drive is required by the Department of Education to negotiate for a decrease in the cost of Internet connections. Motivations were also provided for national coordination and resource sharing, as well as working with national and provincial departments of communication, science and technology, and education.

Some institutions saw the integration of ICT as important from a marketing point of view. There were some voices of caution. For example, some submissions noted that the introduction of new technologies into programmes is as likely to disempower as empower learners; and these technologies often make it easy to create poor materials that look good.

Somewhat worrying in submissions were instances of loose and inaccurate use of the term 'constructivism'. Some institutions even equated mere use of technology with constructivist learning. This would suggest that these institutions need to reflect more critically on their approach to teaching and learning, and the way the various methods they use either support or do not support their basic approach. However, in general there appeared to be little evidence of much critical thinking in this regard and a fair amount of overstatement of the value of ICTs *per se*, with insufficient thought given to pedagogical implications.

CONVERGENCE OR BLURRING

Based on submissions, it appears most institutions think that, while there has been a blurring of the distinction between face-to-face and distance education provision, mainly as a result of the use of ICT in both types of programme, there has not yet been convergence. 'Convergence' would imply that all education is broadly similar, whereas most institutions were clear that face-to-face and distance education methods still have distinct roles to play. Several providers felt that institutional differentiation is still necessary, but that there is a continuum of provision ranging from totally face-to-face programmes with no self-study to entirely correspondence programmes with no contact. Hardly any programmes fit either of these extremes, but most are closer to one end of the continuum than the other. However, submissions generally reflect a view that there are no distinct boundaries between distance and face-to-face education. Rather, role differentiation will occur either in response to a need for large-scale provision of self-study learning materials with relatively little lecturer facilitation, or to a need for lecturer-driven learning content and process. 'Blurring' of the distinction is most apparent in postgraduate programmes. A small minority of institutions

argued for convergence, saying that teaching and learning provision is identical in the various delivery modes that they use.

The demands of mixed mode provision in traditionally face-to-face institutions are considerable. Many face-to-face institutions seemed to be arguing that they want to use ICT and to engage in different ways of teaching and learning, which might or might not mean less contact than they have had in the past, and would probably mean less lecturing, but is still very different from what they understand as distance education. Mixed-mode programmes with strong student tutorial support systems were seen as demanding infrastructural resources – such as setting up regional learning centres with administrative staff, learning resources, books, and computers. In addition, mixed mode was argued to make different kinds of demands on academic staff, such as writing self-instructional material, and reviewing and re-writing it. In a face-to-face institution, distance learning and mixed-mode learning require a parallel system of student administration and finance.

Because of this, one submission argued that, in face-to-face institutions, the emphasis in terms of 'blended' and 'mixed mode' programmes, which have components of synchronous and asynchronous learning, should be on:

- Students who are in 'experiential' learning programmes where they cannot attend during the day;
- Helping full-time students to revisit lecture material or to benefit from advantages brought by new technologies; or
- Offering courses not available anywhere else.

Many institutions emphasised the need to offer programmes in partnership. This was seen as being essential to ensure financial viability, and as increasingly being enabled by developments in ICT (through technology-enabled sharing of materials development). It was felt by many that economies of scale can only be achieved through such partnerships. One submission proposed the development of more general structures to provide greater support to institutions offering distance education programmes (in terms of sharing infrastructure, capacity-building on administrative and financial systems, course and materials development, and so on). Indeed, there was repeated emphasis on incentives to share facilities, which will save costs and result in benefits to students through greater diversity of academic input.

One submission cautioned that, while the distinction between face-to-face and distance education was becoming blurred in urban environments, this was not the case in rural areas, where learners had hardly any access to electricity, and were solely dependent on printed course materials received. Lack of access to libraries and to fellow students were seen by many distance education students as aspects that continue to distinguish distance education from face-to-face education.

SAUVCA argued in its oral presentation that the current dominant model of higher education, with predominantly face-to-face programmes, can never become mass provision, because costs to state and student are too high. Therefore, if South Africa is serious about massively increasing access as the number of qualifying students expands it needs to change the model of provision.

DIFFERENTIATED INSTITUTIONS

Based on submissions, it is evident that there is an ongoing need for differentiated institutions and that, for the foreseeable future, there will be two broad categories – dedicated distance education institutions and predominantly face-to-face institutions. Dedicated distance education institutions were seen as being able to offer distance education on scales that other institutions could not. Thus, some argued that role differentiation between institutional types should take into consideration a need for large-scale provision of self-teaching materials with relatively little lecturer 'facilitation', rather than being based on lecturer-driven learning content and processes where there was frequency of contact between lecturer and student, whether or not geographical remoteness is a feature of such programmes. This should not, however, prevent face-to-face institutions from offering programmes using flexible modes of delivery.

One argument for institutional differentiation proposed that, for the purposes of strategic planning at a national level, the dedicated distance institutions should:

- Play a role in building a national infrastructure and networks, in collaboration with face-to-face institutions;
- Cater for large groups of students across the country and beyond;
- Service the needs of working students, or others who are not able to attend a face-to-face institution;
- Allow for lower entry requirements; and
- Offer programmes that are more suited to correspondence mode.

However, it should also be understood that the functions of single distance education institutions were not always clearly defined in the submissions. For example, it was pointed out in oral presentations that, although traditionally dedicated distance education institutions cater for working adults or people with responsibilities which make full-time study impossible, increasingly they are having to cater for young people whose primary identity is that of full-time student.

Simultaneously, it was argued that traditionally face-to-face institutions should work within their sites, responding to local needs, ensuring face-to-face delivery by university staff (or approved staff), and working with smaller numbers, to provide:

- Access to non-academic support services such as sporting facilities, clinics, and cultural activities;
- Services focusing on the needs of younger people studying full-time;[7] and
- Programmes where there is a need for regular workshops, practical laboratory work, and contact tuition in a face-to-face environment.

THE ROLE OF DISTANCE EDUCATION

One major role for distance education was seen to be increasing access to higher education. Distance education was seen as crucial for increasing access for poorer students, as fees are generally lower (although this seems typically to apply in dedicated distance education institutions), as well as for students who do not meet the entrance requirements of face-to-face institutions. Distance education can reach students unable to attend timetabled, contact residential classes (such as working people, mature students, and people living in remote places). In particular, the importance to the economy of in-service or ongoing professional training for working people was stressed, with an emphasis largely, but not exclusively, on teacher development. Distance education was seen as important to rural development because it enables people to learn without moving from rural areas. It also increases access to postgraduate programmes. The contribution that distance education can make to socio-economic development was stressed in many submissions.

Besides increasing access, many institutions felt that distance education can play a role in improving the quality of learning programmes. They felt this partly because of the greater effort that is (or should be) put into developing learning materials and thinking about instructional design in distance education programmes. Distance education was seen as important for quality assurance, because it forces institutions to be more rigorous. The tendency for materials to be designed in teams was seen as positive. Increased competition between providers was seen as healthy. However, many comments on how distance education improves practice seemed to reflect a generic list of best practice, rather than being related specifically to distance education.

Many argued in favour of a general desire to add value and make education more accessible, or what one institution referred to as 'academic entrepreneurship'. The 'massification' of higher education and increasing diversification in terms of pace, place, and space, among other issues, were seen as having provoked greater flexibility in institutional responses to student requirements and preferences. In this context, distance education was felt by some to be the best mode of responding to an increasingly diverse and sophisticated student population.

Distance education was seen as important for enhancing institutions' profiles nationally and internationally. It was also seen as important for promoting inter-institutional collaboration.

7 In oral presentations, it was clear that this is changing. For example, the profile of students at the University of South Africa (UNISA) is changing. There are many more young students who study full-time, and who, increasingly are demanding the kinds of facilities more characteristic of face-to-face institutions.

Many submissions referred to the cost-effectiveness of distance education, in terms of economies of scale and using academic and administrative staff more efficiently.

Perceived disadvantages of distance education

Taken together, the submissions provide a comprehensive list of potential problems in the implementation of distance education. All of the points mentioned below need to considered when developing quality criteria and minimum standards for distance education provision. There was a strong focus on quality in several submissions, with most institutions stressing that quality of provision should be the basis for departmental decision-making. There was, in many submissions, a high expectation of what quality criteria and quality processes could achieve.

A few institutions thought that there were no disadvantages to distance education, other than the fact that student enrolments in such programmes would generate lower subsidies. Others focused on learning skills, arguing that students with weak reading and academic ability or auditory learning styles struggle in a distance education environment. These submissions argued that the affective component of learning could be compromised, and that the lack of extra stimulation for and by good students which often takes place informally in face-to-face education is problematic. Lack of interaction between students was seen as a disadvantage, as students would not be able to share ideas, discoveries, successes, and failures, as well as provide mutual support. Thus learners could easily feel isolated and lose motivation. It was argued that it is also difficult to develop a rapport with lecturers in distance education programmes. The low success rate of traditional correspondence education was also cited as a factor of concern.

Concerns were expressed that, if distance education provision is not effectively conceptualised, managed, and administered, it could remain a fairly expensive and unaffordable enterprise. Such a condition might be aggravated by duplication of programme provision, proliferation in the market of poor quality learning programmes, and spreading infrastructure and resources for learner support thinly. Lack of coordination could also reduce the impact of efforts and resources spent in the design and production of sophisticated learning materials that are properly contextualised, outcomes-based and responsive to learners' needs. In addition, if distance education is not well coordinated, innovatively designed, and linked optimally to ICT, appropriate institutional forms, and delivery modes, this mode of provision could widen the gap between learners and educators. The consequence of this could be to complicate the learning experience, thus frustrating and confusing many learners.

Some argued that, at times, distance education programmes had been introduced by contact institutions responding to market demand, without necessarily providing quality tuition. These submissions emphasised that distance education was seen by some as a 'cash cow'. It was felt that distance education might be perceived as a relatively easy means of supplementing income, retaining growth, and complying with the required demographic balances in the student body. Programmes offered to other developing countries were seen

as often opportunistic and driven by a profit motive rather than quality considerations. Added to this was a concern that many institutions are not ready to deal with the challenge of under-prepared students, and attempt to develop learning materials which 'spoon-feed' students and 'dumb down' programmes. Homogenised learning materials were seen as dangerous, particularly in certain disciplines. A concern was expressed that students were not required to make use of libraries.

Access to infrastructure was cited by many as a problem for students in terms of online or computer-based distance education, while administrative and logistical difficulties were also mentioned. The fact that distance education was introduced in order to ensure that the 'cultural milieu' of some historically white campuses remained unchanged was seen as a problem by some.

In oral presentations, several providers who were engaged in provision of large scale teacher education programmes, some of which had been criticised in the National Teacher Audit, pointed out that they were in 'teach-out' phase with these programmes (i.e. they were not registering any new students, but simply seeing existing students through).

CONDITIONS AND CRITERIA FOR PROVISION OF DISTANCE EDUCATION AT FACE-TO-FACE INSTITUTIONS

With regard to conditions and criteria which should govern provision of distance education at predominantly face-to-face institutions, there was acceptance that programmes should meet agreed quality criteria and be aligned with their institutional missions and capacity. However, there was considerable objection to the requirement of meeting regional and/or national needs. The main difficulty expressed with this is that the logic both of distance education and higher education more generally works against a regional approach in most disciplinary areas. Even when institutions supported the notion that regional clearing houses should decide on required programmes for the region, the question of how to involve dedicated distance education institutions that operate nationally remained unresolved.

The criterion in the National Plan on Higher Education that refers to duplication and overlap of distance education and face-to-face programmes was viewed as highly problematic in many submissions, mainly because it will be extremely difficult to adjudicate and could stifle innovation and quality. It will be extremely difficult for the Department of Education to distinguish between types of programmes, based on the type of information that administrative systems contain. Although some programmes in different institutions carry the same or similar names, knowledge choices, theoretical orientation and pedagogy vary across these institutions, which could result in widely differing programmes.

Various submissions argued strongly that it is legitimate for one institution to want to offer only distance education programmes, but not legitimate to stop other institutions from using a range of modes. Some argued that imposing rules about use of different modes

of delivery would stifle innovation and quality, as well as forcing homogenisation on the system. Others stressed that many distance education programmes in face-to-face institutions are chosen by students because they offer more support than their equivalents in dedicated distance education institutions, as well as because students prefer the specific orientation of the programme to that offered by the dedicated distance institutions. Preventing face-to-face institutions from offering their programmes to the wider community through distance education was seen as detrimental to the interests of the nation's socio-economic development. Relating to this, various submissions stressed that the prospective student must have a choice in selecting an institution for his or her studies.

Some submissions argued that preventing face-to-face institutions from implementing the lessons learnt from distance education – many of which are indispensable for making educationally sound use of modern technology – would run counter to international developments, and would anchor South African higher education in the past. Many submissions also stressed the need for improved student support at the dedicated distance institutions.

However, this suggested criterion was given qualified support by the dedicated distance education institutions, which felt that it would be counter-productive and place an unwarranted strain on scarce resources to allow too much duplication. These institutions felt that the new single dedicated distance education institution should be given a chance to find its feet first, and explore the advantages of being the only single distance education institution (as well as being a cross-sectoral, comprehensive distance education institution).

Few submissions proposed additional criteria for contact institutions wishing to offer distance education programmes. Those that did emphasised the capacity to provide support, and stressed that institutions should not try to offer programmes for which they will not be able to offer sufficient individual contact. A further possible consideration was that, where institutions have an established and proven research capacity, they might be well placed to offer some 'distance' programmes, particularly at postgraduate level. One institution suggested that there need to be specific quality criteria for courses offered in 'distance mode'.

THE FUNDING FRAMEWORK

Only two institutions supported maintaining input subsidies for distance education at 50% of that of full-time equivalent (FTE) students in contact programmes. Even these were very qualified, arguing that it would be difficult to apply, given the lack of a clear distinction between the programmes. One institution argued that, if parity could not be achieved, at least 75% of the input subsidy of face-to-face students should be given for distance programmes. However, a submission made by a student organisation supported the proposals, arguing that institutions should be discouraged from seeing distance education as merely a money-making scheme.

The vast majority of submissions argued vehemently against any degree of differentiation in funding distance and face-to-face programmes. A primary basis for this argument was the blurring of distinctions between different modes, or, as some expressed it, convergence between modes (already described above). Some argued that open and flexible models would become the prevailing models, especially in programmes with large numbers. It was felt that, in many instances, programmes currently offered by distance education institutions and claimed as distance education actually represent as much, or in some cases even more, contact than some programmes currently offered by contact institutions and claimed as contact education. Thus, institutional submissions strongly rejected the proposal for lower subsidies for distance education, arguing that input costs are high, and lower subsidies could lead to lower quality of programme development and delivery.

The main argument was that maintaining the input subsidy at 50% will force traditionally distance institutions to limit themselves to correspondence with limited support, and will prevent predominantly face-to-face institutions from innovating and providing flexible delivery. Both Technikon SA and UNISA argued strongly that distance education reaches vast numbers of students from traditionally disadvantaged communities with limited access to higher education. These students require more support than students who are likely to be more adequately prepared for higher education and, in order for such support to be mainstreamed, significant investments need to be made.

UNISA also expressed concern that emphasis on efficiency might move institutions to apply stricter entrance criteria, thereby denying access to historically disadvantaged students. Another concern was that the number of qualifications awarded might be used as a basis for calculating teaching output subsidies and not FTE degree-credit students. This, it was argued, would cause discrimination against distance education institutions that often, as part of rationalisation and collaboration with other institutions, offer subjects with limited student numbers or specialised courses as part of programmes of other institutions. Distance education institutions also have a large percentage of students who only complete individual courses for non-degree purposes and therefore never complete a qualification. By successfully completing a course, students obtain knowledge that merits subsidisation because it increases knowledge and skills. They recommended that the Ministry should consider replacing weighted completed qualifications with weighted successful FTE degree-credit students or at least basing part of the teaching output subsidy on weighted FTE-degree-credit students.

Many face-to-face institutions saw the proposals as a threat to mixed mode delivery, and as such strongly opposed them. They argued that quality student support was costly. Mixed-mode delivery was argued to be desirable in terms of students' needs for flexibility, but was felt to cost the same as, if not more than, contact tuition. Flexible or 'off-campus' programmes currently were said to have as much contact as traditional contact programmes, and students were said to get considerable support.

A significant number of submissions linked increased subsidies of distance education (or mixed-mode or flexible delivery) to ICT infrastructure. They emphasised the high cost burdens that this places on both institutional types, in terms of investment, maintenance, and staff training and development.

Many submissions questioned whether distance education was in fact cheaper than contact education, and argued that there is mounting evidence to the contrary, some referring to international research which was not cited in the submission. Although some conceded that unit costs can be brought down where economies of scale exist, others argued that quality courseware is very costly to develop. Many institutions also disputed whether running costs are lower for distance education (or mixed-mode or flexible delivery), citing student support, academic development, learner resource centres, tele-tutoring, online teaching, chat-rooms, tutorial groups, open learning courseware and so on as costs of delivery. These submissions argued that these all require upfront investments in order to broaden the range of possibilities for students, and also carry extensive maintenance costs, which, according to some submissions, were in excess of the costs for face-to-face institutions. One submission also mentioned that increased numbers of skilled and efficient administrative staff and delivery systems needed to be in place in order to ensure effectiveness.

Nearly all submissions supported the notion of a phased-in approach to parity of funding, with some proposing a phase-in period of three years and others up to ten. Presumably recommendations are based on an acknowledgement that, with a finite amount of money available, such a move would decrease the average subsidy for a full-time equivalent on a contact programme (according to one university, by 11%). However, some submissions stressed that dedicated distance institutions must prove that they are increasing student support as these subsidies increase. A few institutions made specific proposals for sliding scales in relation to student numbers or other mechanisms for differentiation. These are dealt with thoroughly in Chapter Five, and are therefore not discussed here.

Institutional policies pertaining to provision of distance education

Few institutions had formal policies related to distance education or the use of ICT in education, although some were in the process of drawing up such policies. A few had policies which described their overall teaching and learning strategy, and included a focus on flexible delivery of programmes and learner support. No policies were mentioned which included administrative and staffing issues in relation to distance education, although there is reason to believe that some institutions do in fact have such policies.

Predictions for the future of distance education provision

Several predominantly face-to-face institutions predict that the number of distance education programmes they offer will either remain constant or increase. Clarity about the conditions for offering distance education programmes therefore becomes critical. Many institutions felt

that if they did increase distance education or mixed-mode provision it would be in key strategic or niche areas. This did not necessarily mean that other institutions would not also offer programmes in that niche area – they would simply bring a different focus to bear upon it.

Institutions also predicted increased integration of ICT into their programmes. They argued, therefore that there is a need at national level to:

- Develop and use guidelines to ensure quality in the integration of ICT; and
- Coordinate projects which establish the necessary infrastructure for efficient use of ICT within and across institutions.

In oral presentations, institutions discussed the importance of establishing a network of technologically well-equipped centres. They believe that this kind of coordination will be important for facilitating a broader introduction of ICT in cost-efficient ways.

Conclusion

The stakeholder submissions provided useful insights into how institutions and organisations perceive distance education, as well as how they are describing their own practices. They show very clear trends towards the increasing use of various distance education methods and approaches. However, as stated above, the comments in this chapter need to be interpreted critically, in conjunction with the case studies and detailed costing studies, to balance institutional statements with research into practice.

CASE STUDIES OF DISTANCE EDUCATION PROVISION IN THE HIGHER EDUCATION SYSTEM

INTRODUCTION

This chapter presents the findings of ten case studies of distance education programmes offered by a range of technikons and universities (representing both dedicated distance as well as face-to-face institutions within the higher education sector in South Africa). In Chapter Four these findings are used to analyse and reflect on specific aspects of provision and practice within the sample range. In line with the overall aims of the research project, the case studies aim to assist in identifying ways in which the role and nature of distance education are changing. To gain this insight, specific questions are asked. These include finding out what types of programmes and courses are being offered through distance education methods, and how these programmes are offered.

PURPOSE OF THE CASE STUDIES

The purpose of conducting these case studies was to provide a rich description of practice, framed by institutional positions on distance education presented in the stakeholder submissions (which have been summarised in Chapter Two). Additionally, the case studies provide detailed information about the costs of distance education provision. (These findings have been written up in Chapter Five.) They also contribute to identifying important quality criteria to be included in the Higher Education Quality Committee's (HEQC's) programme accreditation and evaluation processes.

THE CASE STUDY RESEARCH METHOD AND PROCESS

In line with the purpose of the case study research, the programme selection process aimed to examine a range of different kinds of practices in distance education.

Case study selection

Ten programmes were carefully selected. (See Source Document 1a for full case study reports.) In selecting the case studies, the following were taken into account:

- **Type of institution** – Technikons and universities, both dedicated distance and traditional face-to-face institutions, were selected.
- **Programme level** – The range selected includes an undergraduate certificate, undergraduate diplomas, undergraduate degrees, lower postgraduate degrees and a higher postgraduate degree.
- **Study fields** – The dedicated distance institutions were each requested to select two programmes for this study. The only criterion provided for selection was that one of the programmes be a typical, large-scale programme and one an example of good practice. In the case of the six face-to-face institutions, programmes identified by the research team were accepted, with some negotiation around the particular course within the programme that would form the focus of the study.

- **Size of the programme** – These range from small programmes of under 100 students to a number of programmes with between 1 000 and 2 000 students, and one with an enrolment of over 16 000 students.
- **Advertised methods of delivery** – Six of the ten institutions highlighted use of information and communication technologies (ICTs) in delivery of their programmes.
- **Theoretical and applied competencies** – Five of the ten institutions profiled the work-based focus of their programmes.
- **Geographic focus of delivery** – The programmes selected cover a range from those that target students in particular rural regions to programmes that have a national and international reach.

Table 3: Overview of the case studies selected

Case study	*Level of programme*	*Field of study*	*Programme and course enrolments*	*Advertised method of delivery*	*Work-based/ Professional development*	*Centralised/ Decentralised support delivery*
1.	Undergraduate degree	Business, Commerce and Management (BCom)	Programme: 16 139 Course: 16 139	Textbook with wraparound study guide	N/A	Centralised, optional contact sessions offered in 4 urban centres
2.	Undergraduate degree	BA Psychology	Programme: 1 110 Course: 1 110	Innovative use of audio-visual technology to support delivery	N/A	Centralised, optional contact sessions offered in 1 urban centre
3.	Undergraduate Diploma	Law, Military Science and Security (Correctional Services Management)	Programme: 13 000 Course: 1 400	Correspondence	Work-based	No structured contact sessions offered
4.	Lower post-graduate degree	Education (B Ed Hons)	Programme: 2 407 Course: 2 407	Interactive satellite broadcasts	Professional development	Decentralised contact sessions through inter-active satellite broadcasts to 30 urban and rural centres

Table 3 continued

Case study	*Level of programme*	*Field of study*	*Programme and course enrolments*	*Advertised method of delivery*	*Work-based/ Professional development*	*Centralised / Decentralised support delivery*
5.	Undergraduate Diploma	Communication Studies and Languages (Library and Information Studies)	Programme: 461 Course: 54	Work-based Some on-site mentoring	Work-based	Centralised, optional contact sessions offered at 2 urban centres
6.	Higher postgraduate degree	Law (LLM International and Trade Law)	Programme: 50 Course: 50	Interactive satellite broadcasts	Professional development	Decentralised contact sessions through interactive satellite broadcasts to 30 urban and rural centres
7.	Undergraduate Diploma	Services (Transport Management)	Programme: 81 Course: 60	Flexible learning Video conferencing Pre-recorded lectures	Work-based	Centralised contact sessions offered at 2 urban centres
8	Undergraduate degree	Business, Commerce and Management (B Management Leadership)	Programme: 145 Course: 17	Online	Work-based	Mode 1: Contact sessions through the Internet Mode 2: Contact sessions on campus
9.	Undergraduate Certificate	Health Sciences (Community Health Nursing)	Programme: 607 Course: 607	Tutoring at 7 regional centres Work-based implementation and assessment	Work-based	Decentralised contact sessions offered at 9 urban and rural centres
10.	Undergraduate degree	Education (B Ed - Prim)	Programme: 1 200 Course: 135	In-service. Decentralised regular tutoring and classroom-based support	Work-based	Contact sessions offered at 21 rural centres every 2 weeks

Case study researchers

The ten case studies were undertaken by seven researchers. (See Acknowledgements page xiii for details regarding the research team.)

Case study research planning and process workshops

Three workshops were held with the research team and people involved in designing the research instruments. The first workshop took place on 25 March 2003. Its purpose was to:

- Brief researchers on the aims of the CHE distance education research project as a whole and the purposes of the case studies in particular;
- Develop a shared understanding of a range of issues in distance education delivery;
- Clarify and refine the draft instruments to be used in the case study research;
- Enable researchers to use the costing questionnaire;
- Finalise expectations regarding delivery of the research components for case studies.

The second workshop took place on 8 May 2003. Its purpose was to:

- Provide an opportunity for researchers to report back on their progress;
- Give researchers an opportunity to provide feedback on, and suggest any necessary refinement of, research instruments;
- Enable researchers to use the Course Material and Assessment Review Instrument;
- Finalise expectations regarding the structure and content of case study reports.

The third workshop took place on 13 June 2003. Its purpose was to synthesise key findings from the case study research in the following areas:

- The role of distance education in South Africa;
- The nature of distance education in South Africa;
- Conditions for distance education provision;
- The role of the dedicated distance education institution;
- Funding of distance education provision; and
- Quality criteria for distance education programme delivery.

Key areas of focus in the case study research

Research instruments focusing on the following four areas were developed:[8]

- **Institutional policies on distance education provision** – These include policies on distance education delivery, including administrative support, professional support for academic staff involved in distance education programme delivery, funding, and quality assurance.
- **Programme design and delivery** – This includes an examination of:
  - The process used for programme design and development. This involved looking at

8 See Appendix 3 for a list of research instruments. For copies of research instruments, see Source Document 1b.

the alignment between the purpose/outcomes of the programme, the student profile, the content and nature of programme activities, the curriculum support materials, the assessment strategies and success rates.
  - The approach to teaching and learning, including the use of ICT and the nature of learner support offered.
  - The process of materials design and development.

- **Financial costing of individual courses** – The financial planning questionnaire set out to analyse the cost-drivers of ten courses to assist in achieving the understanding required for developing an appropriate set of options for the funding of distance education programme provision. (Key findings are presented in Chapter Five.)

- **Students' experience of distance education programmes** – As part of the case study research process, students enrolled in the programmes were interviewed to verify institutional claims and gain further student perspective on the above issues.

Case study data gathering process

Initially, the CHE contacted the selected institutions to introduce the research project and to request their participation in the case study process. Once this initial approach had been made, researchers contacted and met with coordinators of the ten programmes selected. Interview schedules were set up and interviews held with relevant institutional managers, academics involved in programme design and delivery, and student focus groups. Most researchers spent three to four days on site, gathering the necessary data. Packs consisting of institutional calendars, curriculum support materials, guides, tutorial letters, and assessment materials were supplied for review purposes. All researchers reported that they received much support and co-operation from the institutions, although most experienced difficulty obtaining data on student profiles and throughput figures.

Most researchers found the process an iterative one, and where possible follow-up visits were made to the institutions. Where this was not possible owing to the distances involved, telephonic and e-mail follow-ups were made. Once individual case study reports had been finalised, they were sent to programme coordinators for final review to ensure factual accuracy. In one or two instances minor changes were made, but in general institutions confirmed their satisfaction with the research process and results.

In the following section, the key findings of each of the ten case studies are summarised in a tabular form.

Salient features of the case studies

Case study one

CESM category	Business, Commerce and Management Science
Programme and enrolment	Bachelor of Commerce (General) (16 139 Students)
Module and enrolment	Economics 101-6 1A – This module is compulsory (16 139 Students)
Level of qualification	Three-year undergraduate degree
NQF Level	6
Institutional policy on distance education provision	Institutional policy guidelines and criteria for identifying and developing distance education programmes, setting standards, formulating curriculum design principles and determining costs are informed by the institutional tuition policy.
Review processes	**Course materials:** The course materials for ECS 101-6 have been reviewed twice in the last six years. **Examination papers:** A review of past examination papers has recently been undertaken. **Curriculum design:** No. **Course delivery:** No.
Administrative and professional support for academic staff involved in the delivery of distance education	• This institution has an extensive administrative infrastructure to support delivery of distance education. • It also has a dedicated Course Design, Learning Material Development, and Production and Delivery Unit. • There are 13 regional learning centres. For an additional fee, optional tutorials are offered by the Department of Student Support and the Bureau for Student Counselling and Career Development. From the research, however, it appears that only a few of these centres are used.
Purpose of programme	Information not currently available
Target group	No data available
Student profile	• Data provided as typifying students on this programme is from 2000 as data for 2003 was not available. • Although this type of data is collected, it appears that it is used for administrative purposes but not used to inform the design of the academic programme in question. **Race:** 43% African, 35% White, 15% Indian, 6% Coloured **Gender:** male: 47% and female: 53% **Age:** Under 23: 34% 23–29: 38% 30–39: 33% **Study in home language:** Yes: 57% No: 43% **Geographic distribution:** Gauteng: 50% KwaZulu –Natal: 22% Western Cape: 10% **Full-time/part-time:** Full-time: 31% Part-time: 69%

	Matric status: 63% of students had passed matric with exemption 16% with conditional exemption 21% – status unknown **Matric Mathematics:** Yes: 60%. No: 40%. **Students with e-mail addresses:** 35%.
Institutional description of delivery mode	This institution appears to use the terms *distance education* and *distance learning* interchangeably. The term *open learning* is also used to denote the shift in emphasis from institutional, lecture or content-centred learning, to a learner-centred and outcomes-based approach.
Description of programme/ course delivery and course materials	**Course materials:** • Print based: – Prescribed textbook with wraparound study guide – Tutorial letters (four per semester) **Delivery:** • Independent study • Automatic admission to the examination **Use of ICTs in delivery:** Not applicable **Student support:** • **Optional assignments** – No individual feedback is provided. It is planned to reintroduce compulsory assignments from 2004. These will be multiple choice-type questions. • **Optional contact sessions** – These are held in four regional, urban centres (Pretoria, Durban, Cape Town and Polokwane). – In Pretoria, 12 hours of contact are offered in 1st semester. – In the other three centres only 6 hours of contact are offered. – Attendance at these contact sessions is voluntary. – Approximately 12% of students attend, despite the fact that in a survey 74% of students on the Economics 1 Programme, stated that contact sessions were very useful. • **Optional tutorials** – these sessions are offered at six of the institution's 13 regional learning centres, if there is a minimum of 15 students registered for a particular module at that centre. • Students have to pay extra for this service. • **One-on-one support** – Staff are available at the institution from 8.00 – 13.00 hours on workdays for telephone consultations, personal visits and other forms of contact.
Course pass rate	2002: 35% 2001: 46% 2000: 46%
Programme throughput rate	10.7 % of the cohort of 1993 had successfully completed by 2001. 12% of the cohort of 1992 had successfully completed by 2000. 9.5% of the cohort of 1991 had successfully completed by 1999.

Case study two

CESM Category	BA Human and Social Sciences (949 students on the programme); BA Health Sciences and Social Services (2 788 students on the programme)
Programme and enrolment	BA Psychology Student enrolment: (1 110 students)
Course and enrolment	Community and Health Psychology-Counselling skills PYC204–9 Student enrolment: (1 110 students)
Level of qualification	Three-year undergraduate degree
NQF level	6
Institutional policy on distance education provision	Institutional policy guidelines and criteria for identifying and developing distance education programmes, setting standards, formulating curriculum design principles and determining costs are informed by the institutional tuition policy.
Review process	Internal review processes are reported to occur at departmental level. However, this specific course has not been reviewed. • **Curriculum:** No • **Course materials:** No • **Delivery:** No • **Examinations:** No
Administrative and professional support for academic staff involved in the delivery of distance education	• This institution has an extensive administrative infrastructure to support the delivery of distance education. (Students interviewed still complain that learning materials from this programme do not reach them and of a range of administrative errors that occur vis-à-vis registration). • It also has a dedicated Course Design, Learning Material Development, Production and Delivery Unit. • There are 13 regional learning centres. For an additional fee, optional tutorials are offered by the Department of Student Support and the Bureau for Student Counselling and Career Development. It also appears from the case study information that only a limited number of these centres are used.
Purpose of programme	To: • Provide South Africa with significant numbers of professional counsellors who can improve the psychological health and social well-being of individuals, groups and communities through the design and management of sub-elements of intervention programmes and associated interventions, and who can execute less intense, more formalised/routine interventions. • Enable graduates to register as counsellors with the Health Professions Council. • Provide graduates who can initiate, participate in, and conduct appropriate psychological research individually or within a team approach, and who can utilize research findings. • Deliver counsellors who can find or create employment in a psychological practice, in an institutional context, or as autonomous practitioners.
Target group	• Teachers constitute 14% of the group and social workers also comprise a large percentage of the group. • No additional information is currently available.
Student profile	• **Race:** White 48.6%; African 35.9%; Asian 10.1%; Coloured 5.4% • **Gender:** 78% female and 22% male • **Age:** 47% 25–39 years; 24.9% 19–22 years • **Employment status:** 28.5% full-time, unemployed students • **Qualification levels:** 16.5% mature age exemption; 34.5% SA Certification Council; full exemption 9.8% • **Geographic distribution:** 38.5% Gauteng; 16.9% KZN; 1.7 % Zimbabwe

Institutional description of delivery mode	• Distance education/distance learning is a form of planned learning aimed at limiting the constraints of time/place/pace. • This institution appears to use the terms *distance education* and *distance learning* interchangeably. The term *open learning* is also used to denote the shift in emphasis from institutional, lecture or content-centred learning to a learner-centred and outcomes-based approach. The method of delivery is, however, still primarily print-based. Although the term *correspondence teaching* is no longer used, it is observed that some of the materials still embody the philosophy of that paradigm.
Description of programme/ course delivery and course materials	**Course material:** • Print-based course materials: – Prescribed text books – Workbook – Tutorial letters • Video and soundtrack **Delivery:** • Independent study • Automatic admission to examination **Use of ICTs in delivery:** • Optional audio/video cassette used to enhance programme delivery may be purchased by students at an additional cost. **Student support:** • **Optional counselling skills workshops:** Two counselling skills workshops, one in the first and one in the second semester, form part of the Student Self-Empowerment and Enrichment Programme. They are only offered in one urban centre – attendance is optional. Only 15% of students attend. • **Optional practical assignment:** Practical assignments are optional and no individual feedback is provided. • **Optional tutorials:** – These are offered by the Department of Student Support and the Bureau for Student Counselling and Career Development. They provide academic learner support activities in the form of organised face-to-face tutorials, peer group counselling, role- plays and workshops. The nine learning centres and the three community-based centres are the venues for these activities. – Tutors offer a 1 hour session each week, or a 2 hour session every fortnight: a total of 15 hours per module (semester) or 30 hours per year. – Students pay extra for attending these. • **One-on-one support** – Academic and personal, offered telephonically
Course pass rate	**Course pass rate:** 2002: 74% 2001: 80% 2000: 74%
Programme throughput rate	Programme throughput rate: 21.5% of the cohort of 1993 successfully completed by 2001. 24.8% of the cohort of 1992 successfully completed in 2000. 20.6% of the cohort of 1991 successfully completed by 1999.

Case study three

CESM category	Law, Military Science and Security
Programme and enrolment	Correctional Services Management Programme (13 000 students)
Module and enrolment	Correction Services Administration II (1 400 students)
Level of qualification	Three-year undergraduate national diploma
NQF level	5 a
Institutional policy on distance education provision	Clear institutional policies exist for all aspects of identification, design and delivery of distance education programmes.
Review process	**Curriculum:** All stakeholders i.e. academic staff, the Department of Correctional Services, Unions and Prisoners' Rights Organisations are involved in the curriculum review as part of a regular five year cycle. **Course material:** A committee comprising representatives from the same grouping mentioned above reviews the course materials annually. **Course delivery:** Course delivery strategies are monitored on an ongoing basis in line with guidelines set out by the Integrated Learning Centre Distance Education model adopted by the institution in 1993. **Assessment:** Policy regarding assessment is set down by Senate. The old Certification Council criteria are still in place as new ones have not been developed.
Administrative and professional support for academic staff involved in the delivery of distance education	• This institution has an extensive administrative and professional infrastructure to provide and support delivery of distance education. • It has a dedicated Centre for Courseware Design and Development. • It has 21 regional offices/centres. None of these are used for support purposes in this programme.
Purpose of programme	The programme is intended for learners who function mainly at a tactical level within the Correctional Services Management.
Target group	• This programme targets adult learners, the majority of whom are employed by the Department of Correctional Services. • A National Senior Certificate or any other certificate deemed to be equivalent and approved by the Senate is required for admission to the programme. • Students who are at least 23 years old and with a minimum of three years' work experience will also be considered for admission in line with the institution's RPL policy.
Student profile	**Race:** 70% of students are African. **Gender:** 73% of students are male and 27% female. **Age:** 82% of the students are between 20 and 34 years old (a third of the total number are between 25 and 29). **Employment status:** Approximately 99% of students are employed.
Institutional description of delivery mode	• Distance education is equated with a narrow understanding of correspondence education. Now there has been a shift to modes of delivery that are more interactive, incorporate appropriate contact strategies and pay special attention to appropriate materials development. • The above mode is referred to as the **Integrated Learner-Centred Distance Education Model.**

Description of programme/ course delivery and course materials	**Course materials:** • Print-based: – Study guide and tutorial letters (two per one semester module). **Delivery:** • Independent study. • No contact sessions: The institution claims that it offers 'demand-based contact sessions'. Learners have to organise themselves into a group, and then approach the lecturer. Students interviewed said they were not aware of this option. • Assignments. • Work-based case studies. • Self-assessment activities (application of theory to work situations). • Examinations. **Use of ICTs in delivery:** Not applicable. **Student support:** • One-on-one academic support is available by: – Telephone. – Students making appointments to see lecturers at the institution. • The institution claims that academic support is available at its 23 regional centres, but students interviewed in Gauteng said they had no knowledge of this. • Although some students have access to computers in their work situation, in general they do not have access to e-mail or the Internet.
Course pass rate	(One semester module) 2002: 56% passed 2001: 75% passed 2000: 70% passed
Programme throughput rate	5.4% of the cohort of 1993 successfully completed by 2000 (nine years later).

Case study four

CESM category	Education
Programme and enrolment	Bachelor of Education Honours (2 407 students) (SA institution/OLG Programme is the focus of this case study)
Course and enrolment	Educational organisations (2 407 students)
Level of qualification	Lower postgraduate degree
NQF level	7
Institutional policy on distance education provision	A number of policy initiatives and guidelines for the development of distance education programmes have been developed: • Department-level policies developed for off-campus programmes. • Policies developed by the institutional division for Telematic Learning Systems that set out requirements for distance education programmes and that have been accepted by Senate.
Review process	A review process is implemented on a three year cycle. It includes: • **Curriculum design:** Yes • **Course/programme material:** Yes • **Teach and learning:** Self evaluation by staff • **Examinations:** Yes • **Student feedback:** The institutions claimed that student feedback constitutes part of the review process. Students however said they had never been requested to give feedback.
Administrative and professional support for academic staff involved in the delivery of distance education	• Administrative support for distance education programmes is offered through the division for Telematic Learning Systems as well as through the partnership agreement reached with the Open Learning Group. • It is not clear how much profession support is offered.
Purpose of programme	After completing the qualification learners will be able to demonstrate an advanced reflexive competency regarding: • Fundamental knowledge, skills, values and principles underlying education as a scientific discipline, and also underlying other sub-disciplines, and the ability to analyse and critically evaluate information in the field. • Basic knowledge and skills with regard to the phenomena of learning, teaching, curriculum and educational organisations. • The ability to conduct educational research in order to identify and constructively address critical education problems. • Effective cooperation with others in a team, with personnel and learners of the school as a teaching-learning organisation.
Target group	The programme is designed specifically for qualified teachers who wish to engage in professional development in a chosen area, and at the same time improve their qualifications. The programme intends to provide both theoretical and applied knowledge and requires students to carry out a research assignment in year two.
Student profile	**Race**: 96% of the students are African. **Gender:** 64% are female and 36% male. **Age:** 50% are over 40 years. **Geographic distribution:** Students are spread across eight of South Africa's nine provinces: KZN has 23% of the students; E. Cape 22%; Limpopo 16%; North West 13%. The remaining 25% are from Gauteng, Free State, Mpumalanga and Northern Cape. **Payment of fees:** 84% of students pay for the BEd Hons programme through the Eduloan scheme.

Delivery mode	This institution uses the terms *on-campus* and *off-campus*.
Description of programme/ course delivery and course materials	**Course materials:** • Print-based course materials: – Prescribed textbook *Schools as Organisations* is the basis for study. – Interactive study guide. **Delivery:** • The programme is offered in a number of modes, all of which use study guides as a basis for learning. **On-campus:** • Four on-campus versions of the programme are offered.[9] **Off-Campus:** • Three off-campus versions of the programme are offered.[10] **The following programme is the focus of this study:** Open learning in association with the Open Learning Group (OLG), incorporating twice-yearly 'telematic' sessions around South Africa. **Teaching and learning methods on this programme:** • Two assignments • Self study • One examination **Use of ICTs in delivery:** • **Satellite broadcasts:** Broadcasts of one hour each, plus the potential for a further one-and-a-half hours of questioning of the lecturer by satellite telephone, are implemented once a semester. Satellite broadcasting facilities operated by two other universities are used. **Student support:** • **Telephonic consultations:** Lecturers state that they are available for telephonic consultation in the afternoon. (This, however, is not stated in the OLG handbook and not many students appear to be aware of this option.) • **Satellite broadcasts:** As reflected above, the satellite broadcasts present an opportunity for students to ask questions of the lecturer.
Course pass rate	2003: 90% 2002: 84% 2001: 88% 2000: 67%
Programme throughput rate	63% of the cohort of 2000 successfully completed by 2001 (324 of the original 514 students).

9 The following notes apply:
- Full-time on campus.
- Part-time tuition on campus (a total of 24 contact hours).
- Part-time vacation school part time tuition on campus (a total of 24 contact hours).
- Collaboration with two colleges in the region, whereby the college staff teach the programme on a contact basis on behalf of the institution.

10 The following notes apply:
- Open learning in association with the Open Learning Group (OLG) and incorporating twice-yearly 'telematic' sessions around South Africa. The case study examined this mode of delivery in the most detail.
- Open learning in association with the Open Learning Group in Namibia.
- Flexi-time tuition that is being piloted for the BEd. Hons and involves only about four students overseas. They receive videos of lectures on a monthly basis.

Case study five

CESM category	Communication Studies and Languages
Programme and enrolment	Library and Information Studies (461 students)
Course and enrolment	Information Retrieval III (54 students)
Level of qualification	Three-year undergraduate national diploma
NQF level	5
Institutional policy on distance education provision	Clear institutional policies exist for all aspects of identification, design, and delivery of distance education programmes.
Review process	• **Course materials:** There is a prescribed revision of course material every three years. • **Course delivery:** – There is no formal process. – There is some evidence to support the claim that students' and industry stakeholders' feedback is taken on board. • **Curriculum design:** No data provided • **Assessment:** No data provided
Administrative and professional support for academic staff involved in the delivery of distance education	• This institution has an extensive administrative and professional support infrastructure to provide delivery of distance education. • It has a dedicated Centre for Courseware Design and Development. • It has 21 regional offices/centres, although this case study shows that only four are used for academic support purposes in this programme.
Purpose of programme	The purpose of this programme is to equip students with the requisite knowledge, skills, competencies, and attitudes to become fully-fledged practitioners, concurrently equipping students with the requisite knowledge and skills in computerised cataloguing and computerised reference work to enable them to competently fulfil these duties within a library service.
Target group	• People holding unqualified posts within libraries • Senior Certificate or Grade 10 plus five years' relevant experience • Students employed in library and information practice
Student profile	• **Race:** 67% of students are African, 12% Indian, 11% Coloured, and 9% White. • **Gender:** 85% are female and 15% male. • **Age:** 23% are under 25 years and 57% are between 30 and 40 years . • **Language:** Only 14% of students are first language English speakers and the language of instruction is English. • **Matric exemption:** 22%, Senior Certificate: 75%, Other: 3% • **Geographic distribution:** 44% of students are based in Gauteng, 22% in KZN and 14% in the NW Province.
Delivery mode	The institution refers to an Integrated Learner-Centred Distance Education Model that is used in the implementation of this programme.
Description of programme/ course delivery and course materials	**Course materials:** • Print-based: – Interactive study guide rooted in the student's work situation (with over 100 work-based tasks). No prescribed textbook, but a list of recommended readings. – Tutorial letters – at least three per year. **Delivery:** • Independent study • Contact sessions held in two centres – Johannesburg and Durban. Although this covers the majority of students (66%), many are unable to attend. Attendance is only 20% at these sessions.

	• Assignments – two per year • Practical projects – two per year • Work-based activities – It is estimated that work-based activities make up about 40% of the programme. Each student has to identify a mentor within the library. The institution does not, however, monitor the mentors. • Examination – one examination at the end of the year **Use of new ICTs in delivery:** Not applicable. **Student support:** • Lecturers report that a 'majority' of students make use of telephonic support. Online support is also available – 70% of the students have access to a PC, but of that number only 40% have access to e-mail and the Internet. In practice it appears to be far fewer.
Course pass rate	2002: 24% passed. 2001: 65% passed. 2000: 93% passed.
Programme throughput rate	6.3 % of the cohort of 1993 successfully completed by 2002. A similar trend is evident for students who registered in 1994 and 1995.

Case study six

CESM category	Law
Programme and enrolment	LLM in International Trade Law (50 students)
Module and enrolment	International Commercial Arbitration (50 students)
Level of qualification	Higher postgraduate degree
NQF level	8a
Institutional policy on distance education provision	In 1998 this institution formally committed itself to offering distance education in selected postgraduate niche programmes.
Review process	**Programme:** An internal self-evaluation of all programmes at this institution was completed in March 2003. **Curriculum design, teaching and learning and course materials:** Since 1993 a compulsory peer review of all departments is held on a five-year cycle. **Student feedback:** Compulsory student feedback on all courses and all lecturers was instituted in 1988. However, students interviewed said they had not been asked to give formal feedback on any of the courses in this programme.
Administrative and professional support for academic staff involved in the delivery of distance education	• A dedicated distance education unit has been set up to support administration and delivery of distance education programmes. • A specialist unit supporting academic staff to develop and adapt materials for distance education delivery is also integrated into the central workings of the institution.
Purpose of programme	To provide students with: • A thorough theoretical knowledge and understanding of the most important aspects of international law. • The necessary research and other skills to solve typical problems confronting international trade lawyers and their clients.
Target group	South African legal practitioners involved in commercial work, particularly those acting on behalf of clients involved in international and regional trade and investment; legal advisors of companies involved in cross-border trade and financial transactions; legal advisors of government departments and parastatal organisations involved in the promotion of international and regional trade and foreign investment.
Student profile	• **Race:** 52% are White, 36% African, 8% Coloured, and 4% Indian. • **Gender:** 76% are male and 24% female. • **Age**: The majority of the students are between 35 and 45 years old. • **Language:** Although the data on language is only approximate, conservatively it appears that at least 50% of the students are not first language English speakers, yet the programme is delivered in English. (No language support is offered.) • **Geographic Distribution:** Twelve (24%) of students are located in Gauteng, ten (20%) are located in the W. Cape, eight (16%) are located in the E. Cape and the rest are thinly spread across the nine other centres.
Institutional description of delivery mode	• This institution uses the terms *distance education/off-campus* and *integrated model* for postgraduate teaching and learning. (With the exception of one education programme, all distance education programmes are at the postgraduate level.)
Description of programme/ course delivery and course materials	**Course materials:** • Print-based course materials: – Teaching and learning relies largely on the student's self-study of extensive readers comprising case studies, legislation, rules and legal articles. – Tutorial letters and study notes support self-study.

	Delivery: The LLM programme is offered in two modes: a full-time residential programme offered over one year (35 students) and a part-time distance education programme offered over two years (50 students). Both programmes are coursework Masters. • The programme comprises four taught modules and a research project. • One assignment is written in each module. • One examination is set at the end of each module. • Students are expected to attend an average of three or four two-hour seminars per semester. These are presented by satellite broadcast. • Self-study **Use of ICTs in delivery:** • As stated above, satellite technology is used to broadcast the lecture's input to students in real time (synchronously). The technology allows students to engage the lecturer by satellite telephone during these sessions. These sessions are used primarily to frame new work to be covered. • This university has a partnership agreement with another university and together they share 30 studios situated in various centres across South Africa. To meet the geographic spread of the current student intake on the LLM programme, only 12 of the possible 30 centres are being used. **Student Support:** • One-on-one support offered by the course presenter and programme coordinator telephonically and via e-mail. • A legal librarian has been designated to offer support to distance education students. She does searches and makes photocopies and sends them to the students. • Satellite broadcasts (see above)
Course pass rate	2003: Data not available[11] 2001: 88% 1999: 91%
Programme throughput rate[12]	10% of the 2001 cohort successfully completed. 35% of the 2000 cohort successfully completed. 46% of the 1999 cohort successfully completed.

11 The module International Commercial Arbitration is only offered every second year. Data for 2003 is not yet available.
12 When compared with the pass rates attained in the modules above, the throughput rate appears low. Further investigation into this matter reveals that this is primarily due to two factors: non-payment of fees, and students who have as yet still not handed in their research project, despite having passed all modules. As reflected in the case study report, it seems that quite a number of the students enrolled on this programme and completed the course work component in order to skill themselves to practise in the field of International Trade Law and are less concerned about the academic qualification as such. Completion of the academic research report does not appear to be a high priority in many instances.

Case study seven

CESM category	Services
Programme and enrolment	Transport Management (81 students: programme offered at two sites)
Course and enrolment	Transport Logistics III (+60 students enrolled on the programme which is the focus of this case study)
Qualification	Three-year undergraduate national diploma
NQF level	5
Institutional policy on distance education provision	This programme is an anomaly at this institution, given that it is the only programme being offered through distance education. It was established in response to requests from industry stakeholders, and has developed on an ad hoc basis. The institution does not have a policy on distance education provision, but acknowledges the need to develop guidelines for this 'flexible learning' programme.
Review processes	• **Programme:** Industry stakeholders, union representatives, and institutional subject specialists, who form the joint decision-making committee that manages this programme, review the programme annually. • The programme is now in its sixth year and academics who were interviewed acknowledged that a more vigorous review process, that would examine all aspects of the programme from design to delivery, is necessary. • **Student feedback:** The institutions claimed that student feedback constitutes part of the review process. Students, however, in the component under study, said they had never been requested to give feedback.
Administrative and professional support for academic staff involved in the delivery of distance education	• Given that this is the only distance education programme offered by this institution, all programme-related administrative support functions are handled within the specific department and do not appear to be integrated into the central administrative processes.
Purpose of programme	In the applied context of air, marine, road and pipeline transportation, to: • Enable the students to understand and apply channel management strategies and manage the logistics operations process.
Target group	• Adult learners employed in the transport related industries, especially middle managers in this sector. • Learners wanting to embark on a professional development trajectory. The Transport Management programme is run on a flexible learning basis that has four progressive entry and exit levels. They are: The National Certificate (1st yr), Higher National Certificate (2nd yr), National Diploma (3rd yr) and the B Tech Degree (4th yr). Each level takes one year to complete and is a qualification in its own right.
Student profile	**Race:** 67% are African, and 23% White. **Gender:** 92% are male and 8% female. **Age:** 23–30 years: 19%, 31–40 years: 53%, 41–50years: 28% **Geographic distribution:** Gauteng Province
Delivery mode	Flexible learning/Part-time.
Description of programme/ course delivery and course materials	**Course material:** • Print-based course materials – Prescribed textbook (and CD Rom) – Study guide – Tutorial letters

	Delivery: • This programme is delivered from two sites. One serves students in Gauteng. The other is at the headquarters of a parastatal, and serves its employees nationally. • The institution is responsible for designing, assessing, and accrediting the programmes offered at both sites but modes of delivery vary from site to site. **The focus of this case study is the programme delivered by the face-to-face institution:** ***Ist semester:*** • One lecture/problem-solving workshop per month • Two assignments • One test • One examination of three hours ***2nd semester:*** • Work-based mini-dissertation of 6 000 words • One test **Use of new ICTs in delivery:** The following options are available – conditions apply: • Teleconference – Lectures are broadcast from the campus to regional centres if there are ten or more students. • Pre-recorded audio and videocassettes – These are on request for students who are unable to attend lectures. • Module One was said to be available online – This was not verified. **Student support:** • One-on-one discussions with lecturers during: – Contact sessions – Telephonically – Per e-mail • Submission of assignments/mini-dissertation in phases provides the opportunity for individual guidance and feedback on work in progress. (The assignment must be evaluated at least three times before a final mark is allocated.)
Programme throughput rate	• Data not available

Case study eight

CESM category	Business, Commerce, and Management
Programme and enrolment	Bachelor of Management Leadership (145 students registered with the institution and over 400 registered with eDegree, Johannesburg). NB: The institutional programme is the focus of this study.
Module and enrolment	Small Business Management (3rd year level) – 17 Students
Level of qualification	Three-year undergraduate degree
NQF level	6
Institutional policy on distance education provision	• No formal policy • Some guidelines for identifying programmes to be offered through distance education exist. • Academics interviewed were concerned that distance education students should receive the same quality and services as face-to-face students.
Review process	• There is no formal mechanism for reviewing this course. • Informal feedback is solicited from students at the end of the course.
Administrative and professional support for academic staff involved in the delivery of distance education	• The degree of ongoing administrative and professional support for the open learning programme is not clear, although the initial setting-up process was supported by collaboration with an international institution known for its expertise in developing distance education/work-based programmes for adult learners. • The delivery online programme is extensively supported by eDegree.
Purpose of programme	• To develop the intellectual and practical capabilities of learners in the acquisition, analysis, interpretation and understanding of management leadership concepts in preparation for a career in the following fields: business and industry, responding to the needs of the community, the public sector, trade unions, lifelong learning. • To enhance access, especially to historically disadvantaged adult students, through its system of awarding credits for recognition of prior learning and implementation of principles of open learning.
Target group	• This programme targets non-traditional students, particularly working adults who have had no prior university opportunities and those who do not have matriculation exemption and would thus not normally gain access to university studies. • Entry requirements are Grade 10 / 23yrs + employed and a minimum of 5 years' working experience.
Student profile	• No data available
Institutional description of delivery mode	The BML is offered in two modes: • Open learning – part-time programme offered on campus • Distance education in partnership with eDegree, Johannesburg, offered online[13]

13 The following notes apply:
- Of the 400 students on the eDegree programme, approximately half are based in Johannesburg and Pretoria. The rest are spread across seven South African urban centres, and 35 students are based in Nairobi.
- Courseware is delivered via e-mail and the Internet.
- Students are encouraged to commit to the work timetable that is provided for each module.
- Assignments within the programme are based on working experience and applied to the working situation.
- Real time chat sessions are held once a week.
- One-on-one academic support is offered by telephone and e-mail.

Description of programme/ course delivery and course materials	**Course material:** • Print-based: – Prescribed textbook – An activity and outcomes-based wraparound learning guide **Delivery:** • Four-hour face-to-face sessions offered once a week (Friday evenings) on campus are prescribed. Application of diverse individual and group-work teaching methods focusing primarily on case studies and video case analysis. Peer assessment is integrated. • Compulsory service-learning project comprising site visits, interviews, compilation of reports and reflective practice. • *The Major Piece of Work* – a research-based portfolio project that serves as a key component of the formative assessment process. • The semester mark is weighted at 60% of the final mark, obtained through evaluation of assignments, practical work and service learning, presentations and class participation. An open book examination makes up 40% of the total. • Concern has been expressed about the lack of opportunity for critical/analytical opinion in the assessment processes. **Use of ICTs in delivery:** • Video used to present case studies **Student support:** • Attendance at face-to-face sessions during which one-one one support is available • Scaffolded practical tasks • Feedback provided for tasks completed
Course pass rate:	2002: 94%
Programme throughput rate:	52% of the cohort of 1999 successfully completed by 2002

Case study nine

CESM category	Health Sciences and Social Services
Programme and enrolment	Community Health Nursing (607 students)
Course and enrolment	Community Health Nursing 1A (607 students)
Level of qualification	One-year certificate
NQF level	5
Institutional policy on distance education provision	The 1999 policy document for a *Mixed Learning Approach* contains a set of guidelines and principles for internal regulation of open learning at this institution.
Review process	**Curriculum:** Reviewed every three years **Course materials:** No data available **(Learning and Teaching:** No set process The School of Nursing acknowledged a need to develop principles and practices for teaching and learning in each programme) **Examinations:** Externally moderated **Stakeholder input:** Informal input received from stakeholders
Administrative and professional support for academic staff involved in the delivery of distance education	• A dedicated open learning unit has been established to support the development and delivery of open learning. • Professional support is offered to academics involved in distance education delivery.
Purpose of programme	To: • Offer a comprehensive approach to health care. • Promote client participation in client issues. • Provide appropriate community health measures. • Ensure affordable, accessible and effective health care.
Target Group	• Registered nurses employed in hospitals or clinics • Both urban and rural focus • Learners who want to progressively develop themselves professionally. The School of Nursing offers a range of one-year certificate qualifications leading to an undergraduate Diploma in Nursing and eventually to a B Cur Degree.
Student profile	• **Race:** 97% of the students are African. • **Gender:** 99% of the students are women. • **Age:** No data is available. • **Employment status:** All students are employed. • **Geographic distribution:** Strong is rural focus.
Institutional description of delivery mode	• Mixed mode/Open learning
Description of programme/ course delivery and course materials	**Course material:** • Print-based course materials: – Prescribed text books – Readers – Study Guides **Delivery:** • Fortnightly contact sessions held on Saturdays at seven regional, centres predominantly rural • Supervised clinical practice • Problem-based assignment rooted in work situation (6 research projects and 8 minor assignments)

	• Self-directed learning • Practical examination **Use of ICTs in delivery:** Not applicable **Student support:** Use of new ICTs in delivery: Not applicable • Support is provided on a one-to-one basis by facilitators at the learning decentralised centres and by preceptors in the work-based context.
Programme throughput rate (one-year certificate)	2002: 92% 2001: 86% 2000: 78%

Case study ten

CESM category	Education
Programme and enrolment	In-service Primary Education (1 350 students)
Course and enrolment	Schools as Learning Communities (135 students)
Level of qualification	Four-year undergraduate degree (B Prim Ed)
NQF level	6
Institutional policy on distance education provision	Policy currently being formulated
Review process	• Guiding principles have been established for learning and teaching. • All aspects of the programme are scheduled for review this year. It is five years since the inception of this programme. Two cohorts have completed this programme thus far.
Administrative and professional support for academic staff involved in the delivery of distance education	• A dedicated distance education unit has been established to support distance education programmes, but it is not integrated into the mainstream administrative processes. This has caused some tensions, but it is anticipated that the distance education unit will be brought in under the central administration shortly and that this will obviate current difficulties.
	• The unit provides extensive and ongoing professional support to staff involved with distance education delivery.
Purpose of programme	• To develop well-rounded teachers with a range of competencies, not just academic qualifications. A qualified practitioner at this level is able to demonstrate applied competence within the seven educator roles set out in the *Norms and Standards for Educators* policy document.
Target group	• In-service (practising) Foundation and Intermediate Phase teachers who are currently under-qualified and wish to upgrade their qualifications. • Teacher-learners have REQV 12 or less and a minimum of five years' teaching experience. • Teachers with a two-year Primary Teaching Certificate (PTC) plus standard eight must successfully complete the Certificate of Teaching Course before enrolling for the B Prim Ed.
Student profile	In-service (practising) Foundation and Intermediate Phase teachers • **Race:** Majority African • **Gender:** Majority women • **Age**: Data not available • **Qualification levels:** Under-qualified teachers • **Employment status:** All employed (INSET) • **Geographic distribution:** Rural
Institutional description of delivery mode	Open learning/In-service
Description of programme/ course delivery and course materials	**Course material:** • Print-based: – Prescribed text book – Readers – Study Guides **Delivery:** • Face-to-face sessions offered once a fortnight at 21 rural centres across three large regions of the province in partnership with the Provincial Department of Education

	• Modular delivery, actively based on the classroom/school environment (materials presented in Imithamo bite-sized chunks) • One-third of notional hours spent on classroom/school-based activities • Research assignments • Journal writing **Use of ICTs in delivery:** Not applicable. **Student support:** • One-on-one sessions in mother tongue (68 *Abakwhezeli* – tutors) • Feedback on assignments • All teachers receive school-level support from the Educator Development officers at the provincial Education Department and school visits from the *Abakwhezeli*.
Programme throughput rate	The programme throughput rate average for the first two cohorts is 68%.

KEY FINDINGS OF THE CASE STUDIES: INSTITUTIONAL FOCUS

Institutional policies on distance education provision

Of the eight institutions that participated in this case study, six had clear policies on distance education provision. Policies include criteria for identifying distance education programmes, funding, teaching and learning, and greater or lesser degrees of administrative and professional support for academics involved in the delivery of distance education programmes.

The two exceptions were both traditionally face-to-face institutions. In one instance, the institution had not intended offering distance education programmes, but had been prevailed upon to do so by a parastatal organisation that was seeking assistance with the development and accreditation of a vocationally directed qualification because of the expertise located at this specific institution. The distance education programme that is offered in collaboration with the parastatal organisation is thus an anomaly at this institution.

In the other instance, the institution's original initiatives to establish distance education programmes were a response to an urgent national need to offer programmes that upgrade under-qualified teachers. This initiative was coordinated by one of the institution's specialised units, in conjunction with a number of other stakeholders, including the provincial Department of Education, international higher education institutions, and local non-governmental organisations. Although directly linked to the institution in question, the distance education programmes were developed outside the immediate institutional sphere of influence. This has had both positive and negative results. At one level, the distance education unit has possibly had greater flexibility to develop innovative practice in distance education delivery, while, at another, this development has led to some tensions between the distance education unit and the institution's central administration. As a consequence, the institution has decided to pull the unit under the central administration. This has resulted in the university currently having to formulate clear policies on distance education for future provision.

Institutional review processes

Findings with regard to the institutional review of curriculum design, course materials, teaching and learning approaches and assessment strategies are uneven across both dedicated distance and face-to-face institutions.

At both of the dedicated distance institutions, one of the programmes studied was subject to regular review, while the other had no formal reviewing mechanisms in place, relying only on informal feedback.

Four of the face-to-face institutions had well-developed review mechanisms in place, while two relied on informal feedback only.

Three institutions specifically said that they took cognisance of feedback obtained from students on the programmes, but, when asked, students said they had never been approached for such feedback.

Administrative and professional support for academic staff involved in distance education delivery

The two dedicated distance institutions, as expected, both have an extensive administrative infrastructure and specific units whose function it is to support materials development and offer professional support to staff and students. Yet, despite the network of learning centres and offices which both dedicated distance institutions have nationally, the case studies reflect limited use of these centres for student support.

Of the six face-to-face institutions, four have special units dedicated to supporting both the administration and the delivery of distance education programmes. These four institutions also have units/centres dedicated to materials development for distance education delivery.

As is shown later, systems for academic support of students are, on the whole, much better developed in the face-to-face institutions than in the dedicated distance institutions.

KEY FINDINGS OF THE CASE STUDIES: PROGRAMME FOCUS

In examining the question of *how* distance education is delivered, the case study research has created an opportunity for a more thorough look at practice by examining ten programmes in detail. Within this sample range, some examples of good and bad practice in distance education provision across both dedicated distance and face-to-face institutions are flagged.

Institutional description of programme delivery mode

All ten institutions selected for the case study had different terms to describe their mode of delivery. In a number of instances, institutions used more than one of these terms interchangeably. The following terms were used: *mixed mode, open learning, flexible learning, part-time, in-service, distance education (online), on-campus/off-campus, integrated, integrated-learner-centred* and *distance learning/distance education*. However, despite the number of terms used, there appears to be a basic understanding of distance education as it is practised in South Africa at the moment.

As is noted in Chapter Two, the term *distance education* is used in this report to apply to the use of a range of methods designed to deal with remote students (students who are separate in space and sometimes also in time from the institution.)

A mix of delivery methods and strategies

Integration of ICT into educational programmes

There is clear growing interest in the use of ICT, with ambitious plans in a few institutions to migrate all courses to online delivery. There are, however, still some that are a long way from implementation. The case study research reflected some overstatement of the extent of ICT integration into programme delivery. Equally, there is some worrying evidence of uncritical perspectives on the use of ICT in education. Use of ICT in the delivery of education programmes cannot be taken to be a panacea for all the ills, and will not produce quality education delivery *per se*. (As seen in Chapter Two, this sentiment was repeatedly expressed in the stakeholder submissions.)

Similar findings were made in the international country studies; all six studies reflecting a strong trend to move distance education into a highly interactive and multimedia e-learning mode. As many higher education institutions get 'wired', the drive to use the newly available technologies in the teaching-learning process appears to 'take over' from a more cautious needs-based approach to innovation. Adoption of technologies that allow group interaction in both synchronous and asynchronous modalities appear to have a particular appeal to practitioners of the prevailing educational philosophies that advocate collaborative and interactive learning methodologies. Equally in this instance, however, the research revealed little critical consideration of what it actually takes to design and offer programmes that are collaborative in nature and pedagogically sound.

All programmes in this study make primary use of a print-based delivery method. Additionally, six also make some sort of use of ICT to *enhance* delivery. However, the claims made in calendars and promotional brochures advertising the use of various forms of ICT as the method of delivery in a number of the programmes in this study appear to be somewhat inflated. With the exception of one instance where the institution has entered into a partnership with a private provider that delivers the programme online, it would be more accurate to describe the use of ICT in the case study programmes as *enhancing* certain aspects of delivery; for example, where interactive TV (satellite), audio-visual cassettes and tele-conferencing are used in certain components of the programme rather than as the primary vehicle of delivery. Nevertheless, most programmes do use a mix of delivery methods and strategies. The following examples serve to illustrate a range of delivery practices.

Range of delivery practices

Two programmes in the case study pioneer a number of innovative methods and strategies in their programme delivery. These are the Community Health Nursing Diploma and the B Prim Ed, both of which are programmes offered by traditional face-to-face institutions. They are both in-service programmes supporting the professional development of under-qualified nurses and teachers. Both have a rural/developmental focus. The Nursing Programme has

an enrolment of just over 600 students and the B Prim Ed programme has 1 350 students currently enrolled.

These programmes use prescribed textbooks, readers and study guides as the basis for content transmission, complemented by elaborate support strategies. These include fortnightly contact sessions at decentralised rural locations, while both have significant work-based components offering practical assessment opportunities. Students on both programmes are regularly required to do assignments for which they receive individualised feedback. Various formative assessment strategies, such as making portfolios of tasks completed, are integrated into the delivery process. It is noteworthy that the B Prim Ed students also receive one-on-one tutoring in their mother tongue.

The LLM is an example of a small-scale highly specialised niche programme that, through the use of satellite broadcasts, is flexible enough to reach individual students in small towns such as Worcester in the Western Cape. It is offered to practising attorneys and advocates who want to enter the field of international trade law (50 students). This face-to-face institution makes use of satellite broadcasts to reach students in far-flung areas across the whole of South Africa. As receiving the broadcast does not entail great expense, centres can be set up on an ad hoc basis to accommodate the needs of individual students. On this programme, for example, there are seven centres where only one or two students attend lectures.

This programme is heavily print-based. Students have to get to grips with two volumes of legal case studies, rules and laws totalling approximately 2 800 pages per semester module. This is mediated with six to eight hours of satellite broadcasting over a period of one semester (13 weeks). Satellite lectures are used to introduce and frame sections of independent study. Students are required to do an assignment in each module, which entails the application of rules and principles studied in the given area of law to solve a legal problem. Assignments serve to scaffold preparation for the examination that is written at the end of each module. The assignment is weighted at 40% of the final mark allocation for the given module. Additional support is offered by the appointment of a legal librarian whose dedicated function it is to support the distance education students in the Law faculty.

Two programmes offered by face-to-face institutions made use of videos as part of their programme delivery, in one instance as a medium for presenting case studies for group discussions, and in the other for taping contact sessions as a support strategy for students who are unable to attend these sessions.

The Bachelor of Management Leadership programme targets working adult learners. (As mentioned above, this programme is offered in two modes. There are 145 students registered with the face-to-face provider and approximately 400 students registered for the programme with the online private provider.) The programme is based on experiential learning and assessment and recognition of prior learning. It caters particularly for adults who have not had previous opportunities to study.

Learners are expected to read and prepare the relevant materials, as well as visit the Internet. During contact sessions, learners watch videos in which work-related case studies are presented. They then work in small groups to prepare and present their analysis of the case study. This is evaluated by peers and credits are awarded. The programme also has a compulsory work-based component.

The Diploma in Transport Management is also an example of a professionally directed programme, developing capacity in this field of work. Regular problem-solving workshops are held, while assignments and tests are structured into the programme delivery as part of the formative assessment process. Workshops are taped on video and made available to students who were unable to attend.

Three of the four programmes in this study are large-scale. They typify the extensive reach of distance education in recruiting students. However, these particular case studies also appear to reflect a lack of innovation in terms of developing strategies to support students on the programmes.

The Diploma in Correctional Services Management (1 400 students) is aimed at people working in the field, the BA Psychological Counselling (1 110 students) is a general degree and the BCom Economics 1 course (16 139 students) is a general degree programme. All are print-based. Courseware comprises a textbook with wraparound guidebook and three or four tutorial letters per year. The study method in these programmes is independent study.

Multi-modal delivery of programmes

Four of the six distance education programmes offered at face-to-face institutions are delivered in more than one mode. The term *multi-modal* is used by a number of institutions to refer to instances where the same programme is delivered through a number of different modes concurrently.

The BEd Hons example cited immediately below has the most variations. The provider claims that the content and methods used are identical in all seven modes, but closer scrutiny of the various modes revealed that there are significant differences.

The BEd. Hons is offered in a variety of modes as follows:

- Full-time;
- Part-time on campus;
- Part-time Vacation School method;
- Open learning in association with the Open Learning Group;
- Open learning in association with the Open Learning Group (Namibia);
- Flexi-time to overseas students; and
- In association with the college's two regional centres.

Other examples that have arisen from the case studies include:

- The LLM programme in International Trade Law, which is offered on campus, face-to-face, and through distance education.
- The BML programme, which is offered through open learning/part-time and online in partnership with a private provider.
- The National Diploma in Transport Management, which is offered at two different sites, one of which is institutionally based and the other offered on the premises of the partnering parastatal. Each employs different methods of delivery.

Collaboration in programme design and delivery

Institutional responsiveness to industry and the needs of specific government departments is illustrated in the fact that four of the ten case studies had extensive stakeholder participation in their programme design and/or delivery. These are:

- **The B Prim Ed programme**: The stakeholders include a provincial Department of Education, the Open University (UK), the University of Southern Australia and various NGOs collaborated on designing this programme. The Department of Education remains involved in delivery.
- **The B Management Leadership programme** was set up and designed in partnership with De Paul University Chicago and the Department of Labour (DoL). A private online degree provider currently has a partnership agreement whereby it offers the programme online to a number of stakeholder industries, including the DoL, Makro, and Petro SA (formally Mossgas), as well as 35 students based in Nairobi. Industry stakeholders participate in an annual review of the programme.
- **The Transport Management programme** has its genesis in the Transnet in-service training programme at its Esselenpark site, which was first established in 1998. In 2000, Transnet approached the provider to revise the programme, design and administer assessment procedures, and accredit the programme. It is now currently offered on two sites: at the providing institution and at the Transnet site in Esselenpark.
- **The Correctional Services Management programme** was first designed in partnership with the Department of Correctional Services (DCS) in 1982. In 2000, the programme was revised with ongoing input from the DCS as well as from police unions and the University of the Witwatersrand's Centre for the Study of Violence and Reconciliation.

Responsiveness to regional, national, and industry needs and collaboration on various aspects of the programme design and delivery provide a positive example of the nature of distance education.

Student support

The term *student support* is used very broadly in distance education to mean anything that helps students learn; for example, a tutorial or availability on telephone or e-mail to answer questions.

Typically this may include:

- Contact sessions (lectures, workshops, etc.);
- Tutorials;
- One-on-one support (face-to-face, telephonically or via e-mail); and/or
- Personal feedback on all assignments and tasks completed.

In this study, the majority of programmes reflect the kind of support described above. However, in some programmes most of these support functions are limited in the following ways:

- Contact sessions are *optional* and, in addition, some are conditional on the number of students present or even on the students themselves taking the initiative to organise the contact sessions.
- Contact sessions are only offered in a limited number of urban centres. In one instance, four centres are used and in another only one.
- Attendance at contact sessions ranges between 10% and 20% across all four programmes.
- On two programmes, assignments are also *optional*. Feedback is provided in a generic memorandum/exemplar answer.
- Tutorials held at the learning centres of one of the dedicated distance institutions are charged for in addition to fees paid for the programme.
- In two programmes there is no opportunity for formative assessment. Once registered with the institution, the student gets automatic admission to the final examination.

Uneven quality of curriculum and programme delivery

While the issue of access is key to transformation of higher education in South Africa, it is not sufficient to ensure that students have a fair chance of successfully completing their studies. The quality of curriculum, type of support that students receive, and nature of assessment are as important.

Concerns regarding quality are reflected in the *National Plan for Higher Education*. In establishing the Higher Education Quality Committee (HEQC), the Higher Education Act explicitly recognised that quality issues are central to the notion of a transformed higher education system. Similarly, the majority of institutions raised the issue of quality in their

submissions to the CHE Task Team and during case study interviews as being a key determining factor in regulating distance education provision.

As stated above, key indicators of quality in programme provision are the quality of the curriculum and the quality of support offered and assessment strategies implemented. One is therefore looking for a curriculum that is robust, up to date and transformative, support that enables students to succeed, and assessment strategies that are formative in nature.

To this end, the case studies provide data on the quality and level of curriculum materials, the type of support offered (discussed in some detail above) and the nature of the assessment strategies that are being implemented:

Curriculum materials

The majority of academics interviewed as part of the case study research asserted that, in line with their own institutional teaching and learning policies, their approach to curriculum design, materials development, and programme delivery had shifted to a learner-centred, outcomes-based approach.

In the context of curriculum support materials this will typically include materials that show evidence of:

- Alignment between student profiles and course materials;
- Alignment between course outcomes/purpose, content, teaching and learning methods and assessment;
- Alignment between the stated NQF level, the level of the course, the level of target audience, and the level of course and assessment materials;
- A teaching and learning approach that is interactive and learner-centred; and
- Content that is well scaffolded and relevant to the student's context.

The case study research has shown that the quality of materials across these programmes and courses is uneven. There are some wonderful examples of good practice across both dedicated distance institutions and some of the face-to-face institutions. (They include the B Prim Ed programme, the Community Nursing programme, and the Library Science programme.) Equally, there are some rather mediocre and some very poor examples of course materials that do not measure up to the criteria set out above.

Reliance on good curriculum materials to 'teach' in distance education programmes makes concerns regarding the quality of these materials that much more urgent. Of particular concern were the curriculum materials of one programme that does not appear to meet the level one would normally associate with a postgraduate qualification. The seminal text was found to be rather prescriptive and related tasks relied heavily on recall and basic

comprehension rather than on the kinds of critical or analytical skills typically associated with postgraduate study.

Another programme was lacking in its attention to levels of analysis and reflection, and seemed to fall short of the institution's emphasis on the need of learners to become 'critical and creative thinkers and eventually leaders who utilise innovative approaches in start-up ventures or within established organisations'. In the same programme, despite its advertised 'acknowledgement of the subjective nature of knowledge', only one theoretical model is presented, offering only one paradigm of ethics and values with no possibility for comparative analysis.

Without exception, the outcomes of these programmes stress the notion of students becoming 'critical, independent, analytical and innovative thinkers', but the nature of curriculum support materials and tasks set often seemed to mitigate against achievement of these outcomes.

Assessment

In line with the pedagogic paradigm shift to a more learner-centred approach to teaching and learning, evidenced in some of these case studies, more formative approaches to assessment are also beginning to emerge.

With the exception of two programmes in which students gain automatic admission to the examinations, in all other instances a year mark based on a number of formative assessment tasks is taken into account in arriving at the final mark. The weighting of the year mark varied from 20% on the Correctional Services programme to 40% on the Library Services programme and 60% on the B Management Leadership programme (which also has a well-established RPL process in place).

Success rates

Obtaining data on course pass rates and programme throughput rates has proven to be very difficult, and in most instances required some persistence as this data was not readily available.

Clarification of terms

- *Course pass rate* refers to the number of students who pass a particular course or module within a given programme.
- *Programme throughput rate* refers to the number of students within a particular student cohort that successfully complete an entire programme. In this study, throughput has been calculated on the basis of allowing three years for completion of the full equivalent of one academic year. This was done on the assumption that the majority of distance

education students are employed and study part-time. It is therefore reasonable to allow more time for completion. So, for example, nine years is allocated for the successful completion of a three-year diploma qualification.

Course pass rates

Course pass rates are significantly higher than programme throughput rates. Pass rates range on average between 42% and 90%. Explanations for this vary from the fact that students are only able to manage one course at a time, to the notion that students only take certain courses so as to qualify for certain work-based promotions. It was also suggested that some students may only complete courses that are of immediate relevance to their work situation. For example, the LLM in International Law is comprised of five courses completed over two-and-a-half-years. Four of the courses deal with rules and laws pertaining to implementation. The fifth component requires students to complete a research project. As all students are practising attorneys or advocates, they are more concerned with gaining the knowledge and skills required to practise in this field than with obtaining the qualification. As a consequence, many defer completion of the research component indefinitely, and therefore never obtain the LLM qualification. In other instances, students may be taking certain courses specifically for non-degree purposes.

Throughput rates

- **One year certificate in Community Nursing:** 85% average throughput rate over the last three years
- **Four year B Prim Ed:** 68% average over the last two years
- **BEd Hons:** 63% first cohort (2000/2001)
- **Bachelor of Management Leadership:** 53% one cohort (2000)
- **LLM in International Trade Law:** 46% average over two cohorts since 1999
- **Library Science:** 6.3% cohort of 1993 completed by 2002.[14] Throughput rates for the cohorts of 1994 and 1995 are similar.
- **Correctional Services Management:** 5.4% cohort of 1993 completed by 2002. Throughput rates for the cohorts of 1994 and 1995 are similar.
- **BCom:** 9.5% cohort of 1991 completed by 1999, 12% cohort of 1992 completed in 2000, 10.7 % cohort of 1993 completed in 2001
- **BA Psychology:** 20.6% cohort of 1991 completed by 1999, 24.8% cohort of 1992 completed in 2000, 21.5 % cohort of 1993 completed in 2001
- **National Diploma in Transport Management:** Data not provided

14 Although the throughput rate for Library Sciences and the Correctional Services Management Diploma were supplied by the Information Systems Department of the institution, a concern was raised by the head of the Library Sciences Department regarding the accuracy of these figures. Unfortunately, despite attempts to have the figures verified through the office of the Vice-Chancellor, it was not possible to ascertain their veracity.

When comparing the above information on throughput rates with information provided on the provision of contact sessions, general academic support and the implementation of formative assessment processes in the programmes studied, it appears as though poor-quality support may be one factor contributing to poor success rates.

Conclusion

Given the small sample size, the ten case studies cannot be used to determine general trends but do assist in flagging a number of issues. The findings provide a textured description of a range of distance education practices at present. The issues flagged reflect both strengths that serve as models of good practice and weaknesses that need to be overcome.

Over and above the dedicated distance institutions, four of the six face-to-face institutions had clear policies for the provision of distance education. From these policy positions flow a number of quality assurance issues, such as institutional regulations and guidelines pertaining to programme design, delivery and review. Equally important for quality provision of distance education are appropriate provision of administrative support, professional support for academics, and academic support for students. Here, the findings across both dedicated distance education institutions and face-to-face institutions were uneven. Clear criteria and mechanisms to ensure proper administrative and academic support for both staff and students need to be established, as well as processes for regular programme development and delivery review.

The focus on the provision of ongoing career and professional development reflects the responsiveness of many of these programmes to South Africa's developmental and human resource needs. Responsiveness to industry and government needs is seen in programmes in which strong institutional/stakeholder collaboration is present in programme design and/or delivery.

Although much was said in the case study interviews about the value and use of ICTs in programme delivery, this sample reflected fairly limited use of ICTs. Delivery took place primarily through print-based methodology. Where ICTs were used, they served in the main to enhance delivery.

Many institutions seem to have given thought to developing learning and teaching policies that embrace learner-centredness and an outcomes-based approach. Shifts in pedagogy are emerging and in some instances profound changes have occurred. In other instances, it may all just be lip service.

Quality is a key concern raised both by government and stakeholders. As seen in the review of quality of design and delivery of distance education programmes, quality is uneven. Some institutions exemplify good practice in every detail, from planning and materials development to the one-on-one, work-based support in the mother tongue. Nevertheless, there are also

some worrying features of distance education practice. These include the little time spent by some institutions on materials development and the assumption, for example, that materials can be made available online without any adaptation or that technology is the panacea for all the challenges that education faces. In some programmes, the levels of the exit outcomes are questionable. Lack of academic support, lack of formative assessment processes, and making assignments optional and not marking them or providing individual feedback are weaknesses identified especially in the dedicated distance institutions' programmes. This poor practice appears to be a contributing factor to low throughput rates, where these exist.

THE CHANGING ROLE AND NATURE OF DISTANCE EDUCATION IN THE HIGHER EDUCATION SYSTEM

INTRODUCTION

As was seen in Chapter Two, the focus of submissions made by higher education institutions and stakeholders was on the changing role and nature of distance education, with special reference to access in the light of global trends towards lifelong learning and use of ICT. The case studies on distance education provision built on this by providing a rich description of different distance education practices. The purpose of this chapter is to analyse the key findings of the two previous chapters in an attempt at integrating institutional perspectives and practices to facilitate an understanding of the changing role and nature of distance education in the South African higher education system. The findings are also viewed in the light of data analysed from the six international case studies referred to in Chapter One.

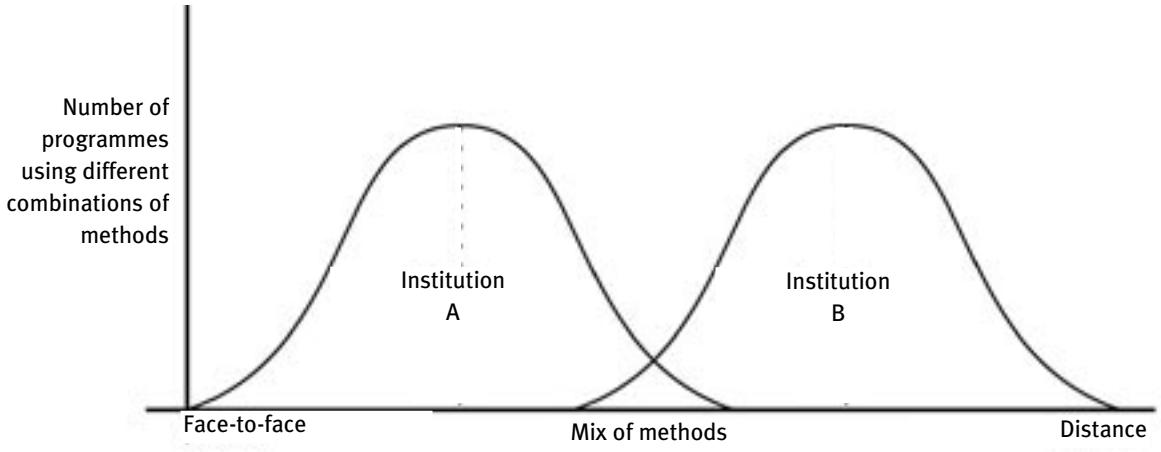
THE CONTINUUM OF EDUCATION PROVISION

The CHE, in *Towards a New Higher Education Landscape* (2000: 44), proposed that higher education exists on a continuum with two imaginary poles, one representing education offered purely at a distance and the other purely face-to-face. The reality is that all educational provision exists somewhere on this continuum, but cannot be placed strictly at either pole. The continuum of education provision can be used to describe a range of educational practices, on which educational provision can be located based on its mix of methods. The greater use there is of educational methods that assume temporal and/or spatial separation between learners and educators, the more this provision will tend towards the distance education pole of the continuum. The more direct contact between educators and learners, the more it will tend towards the contact pole.

A major advantage of this approach is that educational planners can turn from meaningless hypothetical debates about the relative virtues of particular methods of educational provision to consideration of the nature of learning and the educational value of a course's structure and content. Educators often end up equating particular methods of education with good quality education, even when these methods are being poorly implemented. The notion of this continuum is free of such premature and unnecessary judgements about quality and should form the basis of any strategic planning processes undertaken to harness the potential of distance education methods in South Africa.

This is illustrated in Figure 4 below for two separate institutions, A and B. The horizontal axis shows the mix of methods used in programme design, moving from the left, where programmes use only face-to-face methods, to right where programmes use only distance methods. As shown in the diagram, institution A is a predominantly face-to-face institution and B is a distance education institution. Both, however, have a spread of programmes, varying according to their use of methods. As can be seen from the shape of the respective curves, the greater proportion of A's programmes falls within the face-to-face education domain, whereas the greater proportion of B's programmes falls within the distance education domain.

Figure 4: Overlap between traditionally face-to-face and dedicated distance institutions



The methods generally remain distinct

The methods that together comprise the design of the programme remain distinct and 'unblurred', and there is no evidence that they will ever converge (although there is some evidence that a few – but not most – educational practitioners in South African higher education are choosing more widely from the range of available educational methods and integrating distance and face-to-face education methods more systematically).

It is true that introduction of ICT introduces a new range of educational strategies, but it remains a relatively simple matter to establish whether specific uses of ICT incorporate temporal and/or spatial separation. Thus, for example, learners working independently through CD-ROM, or online, course materials are clearly engaged in a distance education practice, while use of satellite-conferencing, although it allows a degree of spatial separation, has more in common with face-to-face education – because it requires learners to be in a specific place at a specific time. Sadly, many people harnessing ICT seem to think they are harnessing the benefits of good quality distance education, when, in most cases, they are simply finding technologically-advanced ways of replicating traditional, face-to-face education models.

The only complexity within this is that ICT has created one specific new form of contact, which is not easily classified as either face-to-face or distance. Online communication allows learners and educators to remain separated by space and time (although some forms of communication assume people congregating at a common time), but to sustain an ongoing dialogue. In online discussion forums, for example, spatial separation between educator and learners is removed by the 'virtual' space of the Internet, but temporal separation remains. Intellectuals or philosophers may wish to debate the intrinsic nature of this form

of communication, but, as a discussion forum allows sustained, ongoing communication between educators and learners, it is clearly a form of contact not a form of independent study. This suggests that there may be cause to introduce a new descriptor for educational methods of direct educator-learner contact that are not face-to-face but are mediated through new communications technologies. However, this one additional complexity is no reason to suppose that there is general convergence of educational methods that have historically been used in face-to-face and distance education respectively.

Shifting provision to the centre?

Changing practices away from 'correspondence education' (based solely on the delivery of paper materials without any structured interaction) to implementation of distance education, in which contact and interaction opportunities between educator and learner are integrated into the programme design, seems to have encouraged a number of institutions to argue that programme provision should be conceptualised as converging. This trend has also grown as a consequence of changes in face-to-face teaching, as some face-to-face provision starts to include resource-rich independent work by students, similar to that used in distance education.

The case studies conducted as an element of the CHE investigation, however, suggest that the case for claiming convergence is weak. All ten cases studies rely primarily on paper-based communication. Some programmes make use of ICT to enhance delivery, but, with one exception, ICT played a secondary role. In the majority of cases, textbooks, study guides and three to four tutorial letters per year are still the norm. While the face-to-face institutions in this study were, overall, more innovative in offering contact sessions and supporting their students, the programmes offered by the dedicated distance institutions all offer contact sessions on an optional basis. The emphasis, in all of the programmes reviewed, is on independent study.

As has been confirmed from the findings of this research, the nature of programme provision in higher education in the current South African context is still distinctly clustered around the distance pole of the continuum. Anecdotal evidence of face-to-face provision shows that it largely consists of lectures and possibly tutorials, and is thus clustered near the face-to-face pole of the continuum.

As stated above, it is expected that, as more conventional face-to-face programmes employ computer-aided instruction and students are required to use the Internet and the Worldwide Web, many of the educational methods that characterised distance delivery will become commonplace in predominantly face-to-face provision. Likewise, many recent developments in distance education facilitated by technological developments, such as online study support workshops, may become available to any students who can access the Web, regardless of where and when they study. This movement would typify a shift to the centre or middle ground of provision on the continuum, with each component bringing different elements of practice to the centre. However, neither the submissions we received nor the case studies we conducted give any reason to suspect that there is a clear trend towards this middle ground across the higher

education system. Distance education, for example, may contribute awareness of the centrality of quality course materials in programme delivery, as well as the importance of integrated student support, advance planning, the preparation of all aspects of programme delivery and the importance of having good administrative infrastructure and systems in place.

In South Africa, use of ICT is in its preliminary stages, even though it may have a profound influence on educational practice in the next ten or so years. Currently, if the different delivery modes are considered to be points on a conceptual continuum, examples of provision located in the middle of the continuum at the intersection or overlap of modes of provision are still negligible.

On this evidence, it is conceptually weak to describe the above trends as 'blurring' the distinction between distance education and face-to-face education methods or as leading to convergence between them.

Slipping into distance education through online delivery

In line with international trends, a number of the face-to-face institutions presented strategies for making more of their materials, administrative and academic, available online. When closely questioned, it became apparent that, with materials readily available online, it would be an easy next step for an institution to deliver any given programme through distance education when the opportunity presented itself. For example, one institution, which says that it does not offer distance education programmes, noted that, when requested by a handful of students outside the country to offer a particular programme online, it was easily able to 'cobble' one together. Although this scenario does not represent a majority position, it does appear to signal a growing use of ICT to deliver education at a distance, without necessarily making this explicit. By itself, though, this says nothing about the quality of educational delivery. In an example such as this, it seems difficult to imagine the quality of the independent study component of the programme standing the test of scrutiny. These issues are discussed in more detail in Chapter Six.

One major historically face-to-face institution, which will, as a result of the restructuring process soon be part of a multi-campus institution, reported its intention to 'migrate' all of its courses online over the next few years. Already involved in distance provision, the institution is thus extremely likely to further extend its distance education provision.

There is, however, nothing about the above scenario to suggest a blurring of distinctions between distance and face-to-face education methods. When course materials are made available online to students attending lectures on campus, then ICT is being used to support predominantly face-to-face education. Where use of the technology shifts to become the primary vehicle through which the curriculum is communicated, then it reflects use of distance education methods.

The requirements for materials design in each instance will vary dramatically. If an online repository of course materials is simply a strategy to make lecture notes available (and students are expected to attend these lectures), the requirements for high-quality instructional design are reduced. When it is the only structured vehicle for learners to engage with the curriculum, the investment required to create high quality distance education materials increases dramatically. Thus, as in the above example, some institutions may be allowing programme and course coordinators to slip between face-to-face and distance education methods of educational delivery without doing meaningful strategic planning or examining the long-term impact of this on quality or cost of delivery. However, there is no reason to accommodate or sanction the poor planning behind loose use of terms such as 'convergence' or a 'blurring' of distinctions.

Summary

From the above, the following summary points can be made:

- The assertion that distance and face-to-face methods used in education delivery are 'blurring' as a consequence of technological developments is conceptually flawed. The added complexity of a few educational strategies using ICT that cannot be simply categorised as either 'distance' or 'face-to-face' is no reason to suppose that historically germane distinctions do not retain their validity.
- It is true that some programmes begin to have a mix of face-to-face and distance education methods, which would place them closer to the centre of the planning continuum than most current provision. However, the argument that all higher education provision is tending towards the centre of the planning continuum presented in Figure 4 is not reflected in current practice. While there is some evidence of greater integration of distance and face-to-face educational methods in programmes, most educational provision still tends clearly towards one of the two poles. Furthermore, while it is hypothetically possible, there is little evidence of any large-scale systemic planning at most institutions to suggest that a tendency towards the centre will gather serious momentum in the short to medium term.

This position is at variance with that of the South African Universities' Vice-Chancellors' Association (SAUVCA) which, in its 2003 Occasional Paper, *Learning Delivery Models in Higher Education in South Africa*, suggests that all provision has converged to what it refers to as *open* and *distance* learning. However, SAUVCA also argues that the current dominant model of higher education can never become mass provision, because the costs to the state and to the student are too high. In its submission, SAUVCA drew on a presentation made by John Daniel (the then Vice-Chancellor of the British Open University) at the Pan-Commonwealth Forum on Open and Distance Learning in Brunei in 1999. The following quotation from this presentation is used by SAUVCA to substantiate its view in this regard:

> Although universities specialise and divide labour as between disciplines, the habit in teaching is for the same individual to do everything: develop the curriculum; organise the learning resources; teach the class; provide academic support; assess student learning.

> This robust, cottage-industry model does not require much organisation. However it does not allow us to reconfigure the eternally challenging triangle of *cost-access-quality* [our emphasis] in the distinctions of lower costs, greater access, and higher quality. (SAUVCA 2003: 12)

This suggests clearly that, if we are serious about massively increasing access, we need to look to models of educational delivery that facilitate such increased access. A greater focus on distance education methods therefore seems inevitable, as a key premise behind distance education provision has been to expand access to education by combining methods of educational delivery that can lead to economies of scale when applied to large numbers of learners. Arguments that we can no longer differentiate between distance and face-to-face modes of delivery because they have converged imply equal treatment – including finances – for all higher education delivery. Clearly, this is at odds with the above notions. If all education is converging, then there is no basis for differentiating the costs of different educational models and thus no systematic way of reducing the costs of the delivery of at least some education either to learners or to the state. This thinking undermines much of the systemic logic that has made distance education such a powerful concept historically.

THE ROLE OF DISTANCE EDUCATION

In the light of the above discussion, the key planning question becomes: for what reasons and under what conditions should government and higher education institutions be encouraging the development of programmes that use predominantly distance education methods?

The rationale provided by most institutions in this study for embarking on distance education is rooted in the 1997 White Paper on Higher Education, which provides explicitly for distance education, and in particular for an approach to provision that:

- Broadens access;
- Ensures learner diversity; and
- Given resource limitations, will play a role in quality enhancement.

Institutions characterised the key roles of distance education in South African higher education as:

- Improving participation rates to non-traditional students, taking cognisance of:
  - 'Race';
  - Age;
  - Gender; and
  - Employment status.

- Increasing access to historically marginalised students by making higher education:
  - More affordable;

  - Easier to enter; and
  - Accessible through flexible learning opportunities.

- Reaching students in remote areas.
- Providing for initial and ongoing career and professional development.
- Expanding access to postgraduate programmes, especially with use of ICT.
- Increasing cost-effectiveness.
- Improving quality.
- Contributing to human resource development.
- Accessing new markets.

This characterisation closely matches the findings of the South African and international case studies. Each of these motives is discussed in more detail below.

Improving participation rates of non-traditional students: Who are the learners?

The case study sample shows that, in line with international trends, distance education programmes facilitate access to higher education for mature age, employed students who require a flexible study timetable and who find it difficult to go to a fixed urban centre to gain new professional qualifications or to upgrade their existing ones. Apart from age, the tables below reflect access according to race and gender. General data on employment status could not be obtained, although typically the majority of students enrolled on distance education programmes are employed.

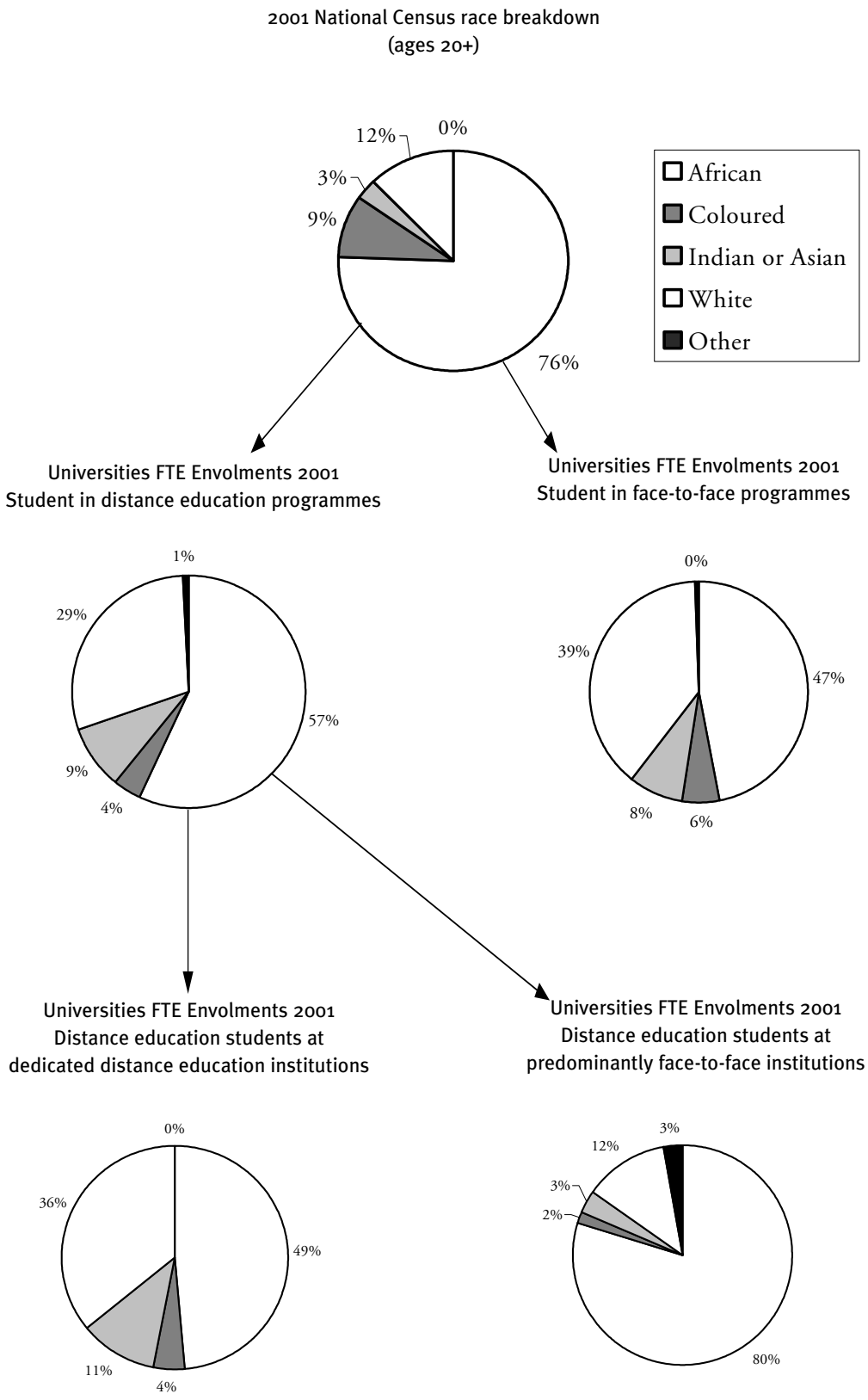
'Race'

The 2001 national census breakdown of data on race shows that 76% of the total population of South Africa over the age of 20 are African. By comparison, data from the Department of Education Higher Education Management Information System (HEMIS), shows that 57% of full-time equivalent (FTE) students enrolled in distance education at universities in 2001 are African. At predominantly face-to-face universities African students constitute 47% of total enrolments.

At universities, 49% of enrolments in programmes provided by the dedicated distance education institutions are African, while 80% of enrolments in distance education programmes offered by face-to-face universities are African. (See Figure 5 below.)

The breakdown of student enrolment in terms of race in the ten case studies confirms very similar data. On eight of the ten programmes the majority of students are African. The majority percentage varies between 53%–90% per programme. The two exceptions are the LLM offered at a face-to-face institution, where 48% of the students are white and 36% are African and the other exception is the BA Psychology offered by a dedicated distance institution, where 52 % of the students are white and 36% are African.

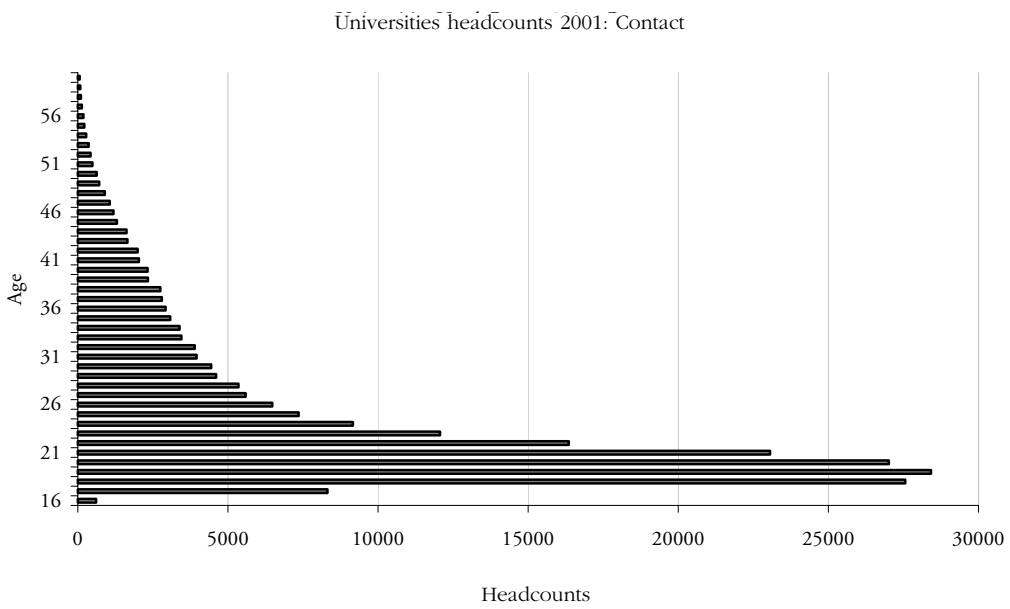
Figure 5: Increasing access to universities: Race

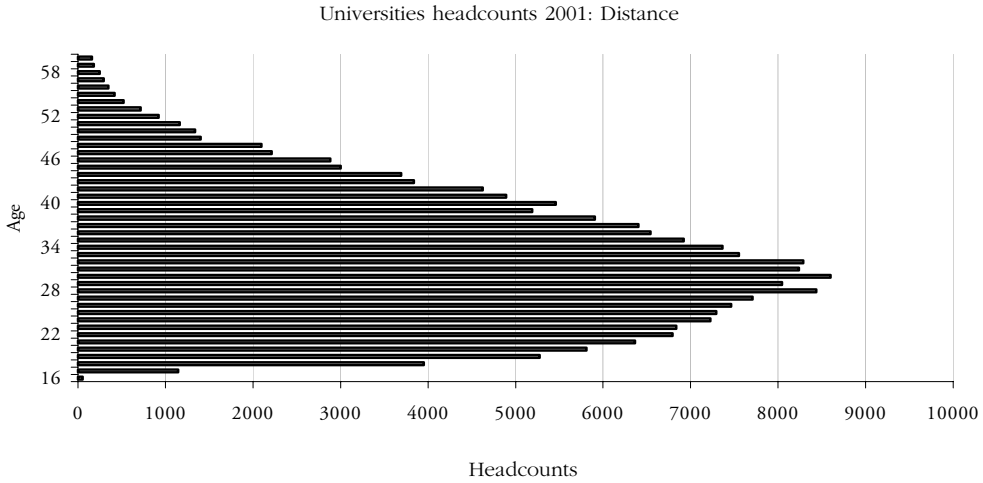


Age

Typically, distance education students, whether at dedicated distance institutions or on distance education programmes at face-to-face institutions, are older than full-time students at face-to-face institutions. (See Figures 6 and 7 below.) Again this is borne out by this study in which the majority of students are between the ages of 30 and 40 years (the two exceptions being the two general qualification programmes at one of the dedicated distance institutions where up to one third of the students on each of the programmes are 23 or younger).

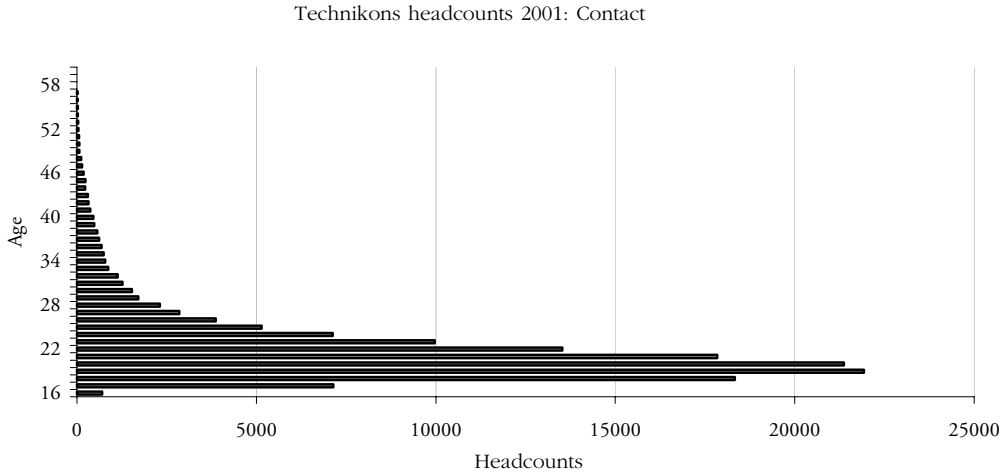
Figure 6: Increasing access: Age (data on universities)

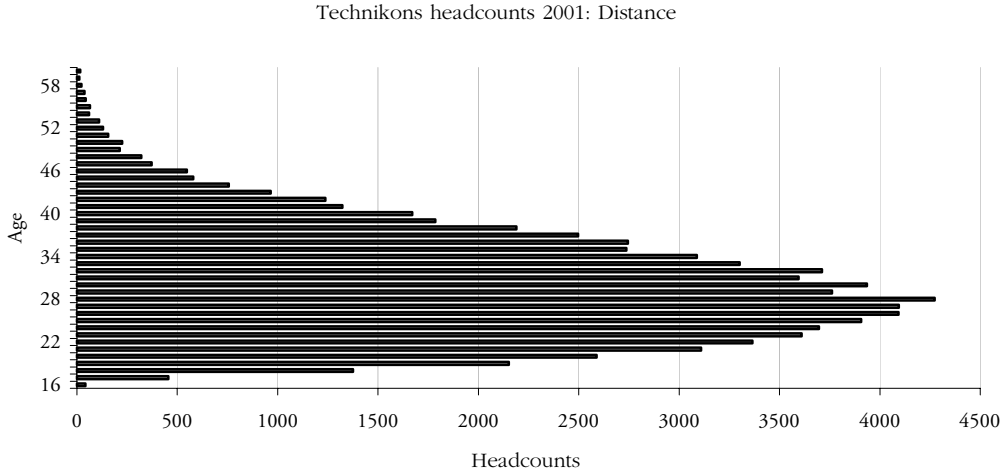




1. In distance education at universities 81% of headcount students are over 23, while in 'contact' education 61% are under 23%.
2. Surprisingly, over 36 000 distance education students at universities are 23 or younger, with the vast majority of these at UNISA.

Figure 7: Increasing access: Age (data on technikons)





1. In distance education at technikons, 79% of headcount students are over 23 and in 'contact' education 76% are 23 or younger.
2. Over 16 700 distance education students at technikons are 23 or younger.

Gender

At universities, females constitute 53% of students enrolled on face-to-face programmes; however in distance education they constitute 61% of enrolments. Females constitute 68% of enrolments on distance education programmes offered by face-to-face institutions. (See Figure 8.)

Females form 43% of distance education provision at technikons, compared to 50% for face-to-face provision within technikons. (See Figure 9.)

In the case studies, gender division is along stereotypical lines. For example, 99% of the students on the Nursing programme are female, while on the Transport Management programme 92% are male. On the two general degree qualification programmes, both offered by the dedicated distance institution, the majority of students are female.

Figure 8: Increasing access: Gender (data on universities)

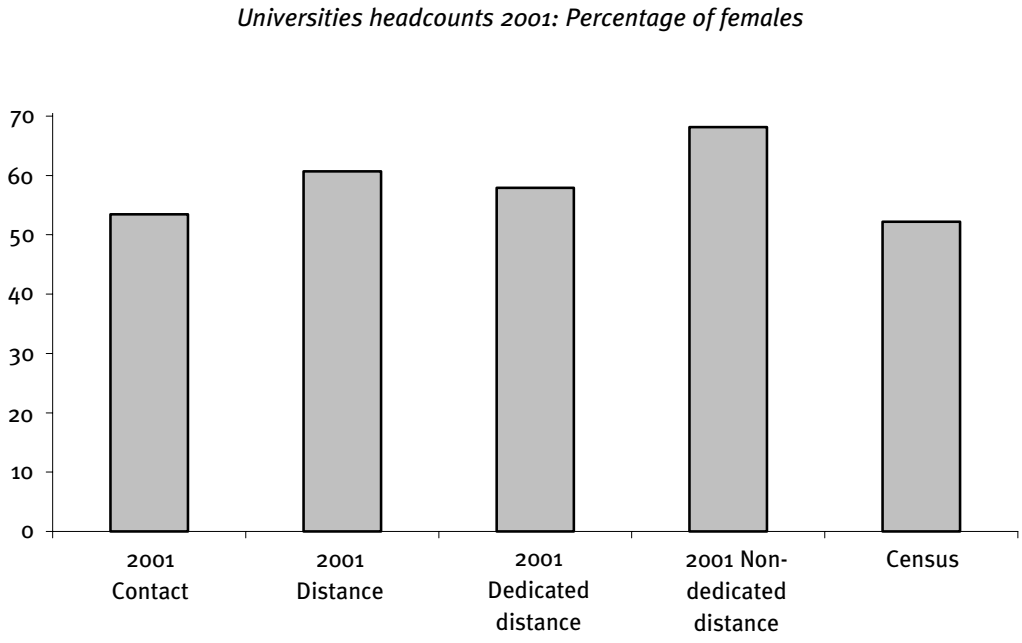
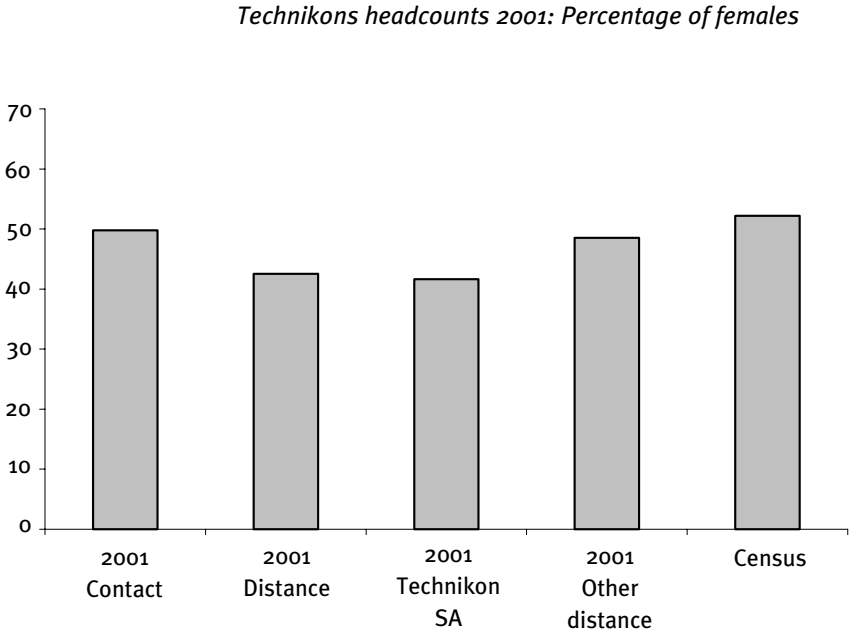


Figure 9: Increasing access: Gender (data on technikons)



Employment status

Data on employment was not available from the Department of Education. On eight of the ten programmes in the case study, all students are employed. The exceptions are two programmes offered by the dedicated distance institution.

To summarise, what is commonly thought of as the 'typical' distance education student profile; that is, a mature age, employed student, is most evident within the programmes offered by face-to-face institutions. Where exceptions exist, they occur predominantly within the programmes offered by the dedicated distance institutions where younger, full-time/ unemployed students constitute almost a third of the students on the two programmes in this study. On average, the age of these students is also almost ten years younger than that of the students on distance programmes in the face-to-face institutions.

Increasing access to marginalised groups

Increasing access through affordability

Lower fees: Several student focus groups interviewed as part of the case studies cited financial considerations as the prime reason for choosing to study through distance education. Cost saving remains a powerful motivation for studying through distance

education, especially in dedicated distance education institutions where fees are considerably cheaper. The majority of programmes and higher education institutions listed in the six international studies either demonstrated or claimed lower operating costs that were passed on to the students in the form of lower fees. This was particularly evident in the documentation of costs and fees of large-scale distance education programmes, generally based mainly on printed materials, even if delivery and interaction occurs via e-mail rather than by post.

Fees for an undergraduate degree at UNISA are generally half of face-to-face institutions. Fees for distance education programmes at face-to-face institutions varied from being almost identical to those at the dedicated distance education institutions (this was evident in half of the case studies) to being the same as for the face-to-face mode.

Additionally, students reflect that, apart from electing to study through distance because they are employed or have other family commitments and do not want to move, they save money by not having to relocate and/or travel to study.

Increasing access through entry mechanisms

A range of new admissions mechanisms and criteria that have been instituted actively facilitates access to most programmes in this study. These include:

- Admission of students in employment directly related to the field of study;
- Recognition of prior learning (RPL) and credits for competence demonstrated;
- Bridging programmes to facilitate access; and
- Discretionary decisions made by faculty boards or Senate based on the requirements of programmes and a candidate's suitability.

Given that, in South Africa, on average, just over 60% of students sitting the matriculation examination pass it and, of those, approximately 16% achieve matriculation exemption, flexibility in entry requirements is a key factor in promoting increased access to higher education for marginalised students.

While these are points of interest, it is important to note that there is nothing intrinsic to the concept of distance education that implies increased access through more flexible entry mechanisms. Any of the above strategies could apply equally to any programme using predominantly face-to-face methods of educational delivery.

Increasing access through flexible learning opportunities

Distance education is viewed internationally as offering the type of learning flexibility needed to meet the demands of lifelong learning in the 21st century. Access to, and participation in, higher education by non-traditional and/or marginalised students (as seen above) is possible in distance

education not only because it is often more affordable and does not require relocation away from family and workplace but also because it allows students to study part-time and largely at their own pace. It is this element of flexibility that creates one of the distinctive opportunities of distance education. Case study interviews conducted with students confirmed that this was one of the key reasons for choosing to study through distance education.

Increasing access to students in remote areas

The findings of the case studies presented in Chapter Three clearly show that distance education methodologies can be most effective in reaching students in remote areas. However, the somewhat surprising result of the case studies is that face-to-face institutions have achieved this much more successfully than the dedicated distance institutions. In spite of elaborate infrastructure and specially geared administrative systems, the programmes offered by the dedicated distance institutions in this study reflect very poor quality support to rural students, with support only offered in a very limited number of urban centres.

Providing initial and ongoing career and professional development

The six-country study also shows that, over and above issues of flexibility, many distance education programmes afford students the opportunity of integrating their studies with their work requirements, thus exemplifying the particular role played by distance education in human resource development. Equally this is typical of South African provision, as can be seen below.

In terms of what is offered through distance education, the case study sample shows that most programmes are more tightly related to work-based/professional development than had originally been apparent.

Six of the ten programmes in the case studies are in effect in-service programmes. They are located in the following fields: Nursing, Education, Transport Management, Library Sciences, Correctional Services, and Business Management. In all instances, employment in the field is a prerequisite for enrolment on the programme, and teaching and learning is strongly rooted in the work-based context.

The two postgraduate programmes in this study both have a professional focus. The BEd. Hons and the LLM in International Law also have employment in the respective field as a requirement for enrolment on the programme.

Thus the case studies attest to the strong work-based and professional development focus of many distance education programmes. These are seen to play a significant role in contributing to the human resource development of South Africa by educating and training people professionally and thereby extending the national skills base, and simultaneously contributing to economic growth, as the workforce is not disrupted while people engage with their studies on a flexible basis.

Niche programmes

While not initially known when selecting programmes for the case study, four of the ten programmes in the case study are niche programmes. These are: the Correctional Services Management Diploma, the In-service B Prim Ed, the Bachelor of Management Leadership and the LLM in International Trade Law.

Each is one of a kind, offered only by a single institution nationally. Such programmes serve to exemplify the potential that distance education has to be innovative and responsive to particular national needs. Of course, this fact needs to be interpreted with care, as it becomes simple for providers to claim that small variations in their programmes qualify them as 'niche' programmes. Likewise, the fact that a programme serves a specified niche does not, by definition, suggest that investment in it is justified. Many, but not all, such programmes cater to small numbers of learners, and the cost of delivering them using predominantly distance education methods may be out of proportion to the value they add.

Improving quality of programme design and delivery

Several face-to-face institutions commented in their submissions that implementation of distance education systems had led to better planned learning procedures and supporting materials and that, over time, these improvements filter through into the mainstream of higher education, so improving the effectiveness of the system as a whole. This point was strongly corroborated in South African case study interviews and the international country case studies.

This phenomenon was observed in the United Kingdom in the 1970s, as a result of the systematic development of the Open University's learning materials by interdisciplinary teams and distribution of these superior quality materials at a below average price through the regular bookshops.

If the national investment in distance education can produce benefits and improvements across the whole higher education system, for example through the mass adoption of materials that have been evaluated and shown to be of superior quality, then the return on investment may be much greater. The possibility of such benefits needs to be flagged as they are not automatic. Although only mentioned in passing in some of the current studies, it is felt that this spin-off effect should be tracked and researched.

Accessing new markets

A number of institutions raised in their submissions the issue of their existing or planned expansion, especially into neighbouring African countries. This was borne out by the case studies, in which three of the ten programmes are examples of programmes that serve new markets:

- The Library Science programme has a current course enrolment of 50 students, of whom 17 are in Kenya.
- The Bachelor of Management Leadership programme in partnership with a private South African online provider has a current course enrolment of over 400 students, with 35 in Kenya.
- The private provider has been approached by a number of other African countries to offer various online programmes in partnership with the same face-to-face institution. These include agreements about the provision of large-scale programmes of the magnitude of 11 000 on the BEd degree over five years at the University of Dar es Salaam. Agreements have also been signed with Maseno University in Kenya and further negotiations with countries such as Uganda and Ghana are under way.

Historically, the dedicated distance institutions are already well established in other African countries, one with 18 centres in Namibia and another eight dotted around the continent. The Economics 101 course that is part of this study is offered under licence to 16 other institutions in South Africa reaching another 4 000 students (over and above the 16 000 presently enrolled with the dedicated distance institution) and to 19 institutions reaching approximately another 4 000 students within the SADC region. Additionally, ten institutions across other African countries and seven in the rest of the world have licensing agreements to offer this course, thus signalling the potential magnitude of reach.

Other disadvantaged groups

Although none of the institutions made mention of the role played by distance education in offering access to higher education to students with disabilities, it is widely accepted that this is the case. Equally, none of the institutions referred to access vis-à-vis class. Possibly in the South African context 'race' continues to be a surrogate for class, but providing the opportunity for social advancement for students of working class and rural poor social origins remains an important role in distance education provision.

Tackling national priorities of human resource development

Distance education has the potential to contribute robustly to key national priority areas of human resource development. However, HEMIS data indicates that in 2001 only 7% of distance education provision at universities and 17% at technikons was in Science, Technology and Health.

Summarising the findings

Key findings regarding the role of distance education in the higher education system include the fact that it is a major mechanism for African students, women, older students, students wishing to study part-time and young students who cannot afford the fees at face-to-face

institutions or cannot afford to move from their domiciles to have access to and participate in higher education.

Although none of the institutions made mention of the role played by distance education in offering access to higher education to students with disabilities, it is widely accepted that this is the case. Equally, none of the institutions referred to access vis-à-vis class. Possibly in the South African context the funding formula is a surrogate for class, but this still remains an important role in distance education provision that needs explicit acknowledgement.

On the basis of this research, the international reviews completed, and SAIDE's engagement with a wide range of education provision models over the past 10 years, it is possible to extract the following general points about the rationale for investing in programmes that use predominantly distance education methods:

1. *Providing access to students who would – because of either work commitments, geographical distance, or poor quality or inadequate prior learning experiences – be denied access to traditional, full-time contact education opportunities.* This motivation has possibly been the key motivating factor behind the use of distance education methods. This role is illustrated by the research, which shows that distance education is a major access mechanism for African students, women, older students, disabled students, students wishing to study part-time, and young students who cannot afford fees at face-to-face institutions or to move from their domiciles to the seat of a face-to-face institution. The drive has been motivated partly by growing awareness of the importance of lifelong learning and corresponding attempts to respond to market needs, and partly by dwindling student numbers in some of the more traditional areas of educational provision and a corresponding need to find new educational markets.

2. *Seeking to expand access to educational provision to significantly larger numbers of learners.* This motivation is linked to, but not the same as, the previous one. Its difference lies chiefly in the scale of the programmes. Many programmes motivated by a desire to provide access to students who would be denied access to traditional full-time contact education do not really have goals of reaching significantly larger numbers of learners. Indeed, it is notable that large-scale distance education programmes are, in general, confined to a few educational sectors. Most other programmes engaged with tend to be small-scale interventions, although it is fair to suggest there may be a change in this regard as the alignment between industry/commerce and programme providers gathers momentum. Altogether, however, distance education is responsible for dramatically increasing levels of participation in higher education.

3. *Shifting patterns of expenditure to achieve economies of scale by amortising identified costs (particularly investments in course design and development and in effective administrative systems) over time and large student numbers.* This motivation draws together the above two motivations, and has been an underlying economic rationale for many distance education

institutions around the world. Its success depends on limiting the number of courses, while maximizing enrolments on these courses. Many distance education programmes simply have no intention or capacity to exploit these economic benefits.

Various reasons for adopting different teaching and learning strategies have been outlined above. Many are largely linked to opening access to more and new kinds of students. However, various reasons for adopting such teaching and learning strategies that pertain more directly to use of resources have been separated out. The intention behind this has not been to set up new artificial dichotomies. Rather, it is to illustrate more vividly that moves to resource-based learning do not, de facto, achieve the goals of distance education as articulated above, and vice versa. Thus, while many distance education programmes examined seek to overcome temporal and spatial separation through the use of resources, some seek only to overcome distance, by using direct communication via telecommunications technologies (such as video-conferencing). Conversely, many efforts to develop educational resources have not systematically focused on achieving the economies of scale that have historically provided such a central motivation to most distance education programmes.

Efforts to integrate instructionally designed resources into courses and programmes have been influenced by various motives. It is worth noting that these objectives have often incorporated efforts to overcome temporal and spatial separation, but not always. When they have incorporated this aim, the result has generally been an integration of distance education and resource-based learning strategies.

1. *Breaking down the traditional notion that a talking teacher is the most effective strategy for communicating curriculum*. While this motive has not been exclusive to distance education programmes, it has been most systematically applied in such programmes. Nevertheless, many face-to-face courses and programmes incorporate instructionally designed resources, as educators have learned the limitations of lecture-based strategies for communicating information to students. It is important to stress that this motive does not imply any intrinsic improvements in the quality of learning experience. The extent to which shifting communication of curriculum to instructionally designed resources leads to improvement in the quality of education is entirely dependent on the quality of the resources developed. Experience has demonstrated that, while spending more money on educational resource development does not necessarily lead to improvements in quality, under-investment in the design of such resources is very likely to diminish the quality of the final resource. Many of the programmes examined operate under very severe financial constraints, and are not able to make investments of sufficient scale in the resources that they develop. Thus, while the motive may be to use resources to communicate curriculum more effectively, investments made in designing those resources often do not allow for the achievement of the intended goal.

2. *Directing a significantly larger proportion of total expenditure to the design and development of high quality resources, as a strategy for building and assuring the quality of educational provision*. This motive is linked to the previous one, but contains notable differences. Importantly, many people motivated by the desire to use resources to communicate curriculum are not similarly motivated by a desire to shift the patterns of expenditure in this way (or are unable to do so because institutional financial policies make it impossible). This can lead to the problems outlined above, where the communication of curriculum via resources rather than a talking teacher does not lead to improvements in the quality of pedagogy. There is, however, another tension that this motive creates when people do seek to shift patterns of expenditure in this way. This can occur when additional money is actually invested in the design of resources, but this investment is then still spread over very small student numbers. The consequence of this can be to drive up the per-student cost of the educational experience significantly, leading to unsustainable educational practices. This issue is discussed in more detail in Chapter Five.

3. *Implementing strategies to shift the role of the educator.*[15] This motive has been important in many education programmes, where educators have sought to maximise the educational impact of contact time with students. As this time is generally the most significant component of variable educational costs, many educators have sought to use it to stimulate engagement and interaction rather than simply talking to mostly passive students. Again, though, it must be stressed that this shift is not a feature of all of the programmes that have been examined. Many educators continue to use contact time to perform very traditional functions, leaving no space for meaningful engagement between educators and learners. As importantly, many educators do not embed the logic of engagement into the resources themselves, often simply creating resource-based versions of traditional lectures. This trend can be particularly pervasive in web-based learning, where many courses simply involve the electronic mark-up of lecture notes into web-compatible formats.

15 In the TELI report, this changing role is described as follows:
- They will become facilitators and managers of learning in situations where they are no longer the source of all knowledge.
- They will plan, negotiate for, and manage the integration of learning in formal institutions, in the workplace, and in communities.
- Many educators may spend a considerable proportion of their workloads contributing to the preparation of courseware.
- Many will interact with learners at a distance through any one, or any combinations, of a variety of media (of which real-time face-to-face interaction is only one of many possibilities).
- Preparation, management, and logistics will vary greatly between the following modes of communication:
  - interaction with learners;
  - presentation of one-way television broadcast;
  - video conference that hooks up a number of remote sites;
  - written response to a learner's assignment; and
  - face-to-face facilitation.
- It will be essential that educators design and administer complicated, increasingly computer-based record-keeping systems that keep track of learners' progress through their individual learning pathways; pathways that reflect individual variations in learning content, learning sequence, learning strategies, the learning resources, media and technologies chosen to support them, and the pace of learning.
- Increasing proportions of educators' work will involve them as members of teams to which they will contribute only some of the required expertise, and of which they will not necessarily be the leaders, managers, or coordinators.

4. *Investigating the potential that the integration of new educational technologies into teaching and learning environments has for supporting, improving, or enhancing those environments.* Given the explosive growth in the use of ICTs in education around the world, we felt it was important to add this motive to the list of motives for engaging in resource-based learning. Significant money is being invested in testing this potential by developing resources of different kinds. This exploration is very important, and is yielding interesting results with potentially important consequences for opening education to more people. It is, however, worth noting that there is nothing intrinsically good about applications of new technologies in education, and there have been many very expensive failures.

Typical reasons for such failures have included:

- Imposition of inflexible technological choices made without reference to educational need and context;
- Lack of investment in integrated curriculum and course design and development processes;
- Integrating technologies into programmes based on poor pedagogical practice, which usually leads to worse quality pedagogical practice;
- Unexpectedly high operating costs, and a very high percentage of total expenditure on recurrent costs, which militates against achieving economies of scale;
- Underestimation of the need for well-developed systems of student support, designed as an integral part of overall courses;
- Lack of attention to designing and implementing effective management and administrative systems; and
- Paucity of people with the necessary skills and expertise to staff programmes, and a corresponding absence of clear professional development strategies designed to overcome this problem.

It appears that many of the motivations described in the 2003 SAUVCA Occasional Paper *Learning Delivery Models in Higher Education in South Africa* pertain to moving towards resource-based learning rather than to distance education per se.

DIFFERENTIATED INSTITUTIONS

The above discussion suggests that there remain strong motivations for designing and implementing educational programmes that use predominantly distance education methods. These motivations are clearly reflected in several of the case studies and are also reflected, to a greater or lesser degree, in the institutional submissions that we received. This raises the question of whether differentiation of the overall role of institutions within this remains valid.

As noted, distance education provision remains a relatively small percentage of overall educational provision at predominantly face-to-face education institutions. Our research, and much international literature on the topic, indicates clearly that designing and implementing distance education programmes requires much specialist expertise and dedicated systems, particularly when it is being designed to reduce the overall costs of provision by achieving economies of scale. It does appear from the case studies that some predominantly face-to-face institutions have developed such expertise (especially in course design) and systems to offer large scale programmes with considerable learner support.

Based on our findings and institutional submissions, it seems reasonable to assume that there is an ongoing need for differentiated institutions – dedicated distance education institutions and predominantly face-to-face institutions. However, it should also be understood that the functions of these institutions cannot be fixed too firmly. For example, it was pointed out in institutional submissions that, although traditionally dedicated distance education institutions catered for working adults or people with responsibilities which made full-time study impossible, increasingly they are having to cater for young people whose primary identity is that of full-time student. (This is reflected in the case study where in one of the distance education institutions nearly 30% of students on both programmes researched, were young, full-time students).

Specific roles and functions of the dedicated distance education institution

It was emphasised in submissions that the dedicated distance institution needs to develop a clearer mission for itself so as to make its own role more distinctive. The point was made that most of the distance education roles identified in this research (see below) cut across all distance education provision, including distance education provided by predominantly face-to-face institutions. Yet, while face-to-face institutions may share these roles they are *essential* to the dedicated distance institution and therefore these institutions should be required to sharpen both their conceptualisation and implementation of them. It was suggested that targets for achieving these should be set.

Suggested roles for the dedicated distance education institution – emanating from the institutional submissions, the SAUVCA submission and deliberations in Cambridge with international distance education specialists – include:

- Development of its capacity in distance education delivery through research and reflective practice.
- Developing and implementing its potential for offering decentralised student support nationally.
- Offering large-scale, general formative distance education programmes based on the funding viability derived from economies of scale.
- Particular engagement in research into and development of distance education practices, and contributing to the national debate in this area.

- Playing a role in building a national infrastructure and networks, in collaboration with face-to-face institutions. This could have at least two major focuses:
  - Establishing shared, properly staffed, well equipped, well maintained, properly managed, and jointly financed higher education learning centres.
  - Developing and coordinating a national information technology (IT) network.

Furthermore, suggestions made by the Minister's Working Group on Distance Education need to be taken into account. Its 2002 Draft Report projected the vision of a

> truly African higher education institution that explicitly serves the development needs of our country. It should do this through the provision of high quality cost effective educational programmes, accessible particularly to working and rural people, and through the conduct of excellent research focused on key priority areas. (Minister's Working Group, 2001/2)

Proposed key characteristics included:

- The institution should be effective, efficient, and equitable.
- It should focus on increasing meaningful access to higher education, particularly for working people in the far corners of the country, and generally the disadvantaged.
- It should develop a critical mass to deliver strong programmes in targeted areas.

The merger process constitutes the new dedicated distance education institution as a 'comprehensive' institution. However, the specific meaning of being a 'comprehensive' institution requires strong interrogation. While, through the merger process, it is clear that its offerings will span a range of programmes from technical to academic and from certificate level to doctoral, it is questionable whether it can offer all disciplines at all levels without compromising quality. Niche programmes should be offered by those institutions that have the expertise and capacity to do so and not automatically be located at the dedicated distance institution. With increased use of ICT it becomes viable for all institutions to offer niche programmes to students across the country.

The international case study produced two examples of institutions, one dual-mode and one dedicated distance institution, that offer programmes specifically aimed at low-income students. They focus on large scale, foundational programmes, delivered predominantly through cheaper and more accessible print-based correspondence programmes. The University Sains Malaysia (USM) is an interesting example of just this. It is a dual-mode education institution, with its distance education component established in 1971. It offers programmes aimed at high priority national needs like teacher training. These programmes employ low-technology distance education delivery modes and charge relatively low student fees. The Malaysian government has decided that USM should continue to receive relatively high levels of central funding, thus maintaining one higher education institution as a 'public good' service. In similar vein, Universitas Terbuka (UT) in Indonesia has been set up by

the government also to specifically offer cheaper and more accessible programmes, thus gaining the monopoly over mass-market, basic foundation programmes. Additionally, recent regulation establishes that all the public universities should expand their use of distance education provided it is in an e-learning technology-based modality and therefore not in direct competition with UT's programmes.

Conditions and criteria for provision of distance education at predominantly face-to-face institutions

The findings of the international case studies are that distance education is seen and treated as a separate category from face-to-face education and thus perceived to require separate attention. As in South Africa, this seems to have been as a response to the growth of the distance education sector, leading to the perception of distance education as 'big business', with the implied notions of making money quickly at the expense of quality provision.

Brazil and Indonesia are both countries that seem to exhibit marked degrees of centralised regulation of distance education within their higher education systems. Malaysia on the other hand has adopted a policy that seeks to reduce the central funding of higher education from 100% to 70%. This is being done by encouraging private-sector investment and development of income-generating activities in higher education institutions. However, the central government sees the regulation of higher education as very much its own responsibility. India, possibly the country in this study with the most extensive and well established network of distance education provision, appears to have the least constricting regulatory mechanisms in place.

In South Africa, the Ministry of Education's National Plan for Higher Education (MoE, 2001) proposed that the moratorium on distance education provision by face-to-face institutions be lifted, with the following provisos: that programmes are approved as part of the institutions' three-year rolling plans, and that institutions seek approval to offer new distance education programmes even if they are not to be subsidised:

> The approval of distance education programmes will depend on the fit between the programme and institution's mission, including capacity, whether it addresses regional and/or national needs, and whether it meets the quality assurance criteria of the HEQC. (MoE, 2001: 62)

In a summary section of the National Plan, an additional condition for the provision of distance education is cited. It requires that:

> The programmes do not duplicate or overlap with programmes offered by dedicated distance education institutions. (MoE: 68)

These conditions reflect the Ministry's underlying concern with quality, particularly in face-to-face institutions – hence the halt on distance education provision. Equally, they underscore its concern with the possible threat that predominantly face-to-face institutions offering distance education might pose to the dedicated distance institution.

In response to the above provision in the *National Plan*, submissions made by face-to-face institutions to the CHE Task Team unanimously accepted that all programmes should meet the quality criteria set out by the Higher Education Quality Committee (HEQC), as well as the requirement that programmes should be aligned with the institutional mission and capacity.

There was, however, some objection to the requirement that programmes address regional and/or national needs. The main difficulty cited was that the logic of distance education and higher education works against a regional approach in most disciplinary areas. Even when institutions supported the notion that regional clearinghouses should decide on the required programmes for the region, the question of how to involve the dedicated distance education institutions that operate nationally remained unresolved.

The criterion referring to duplication and overlap of distance education and face-to-face programmes was found to be highly problematic, and most face-to-face institutions raised concerns in this regard in their submissions. It was felt that it would be extremely difficult to adjudicate, and could result in stifling innovation and quality. One institution, for example, pointed out that, though a programme might appear to be the same, knowledge choices, theoretical orientation, and pedagogy varied across different institutions, and could result in widely differing programmes.

As noted in Chapter One, distance education provision at the majority of face-to-face institutions currently constitutes between 4% and 32% of their offerings. It is appropriate that face-to-face institutions should continue to offer predominantly face-to-face provision. It appears that the current formulation regarding duplication and overlap of programmes in the National plan needs refinement. It is suggested that consideration be given to qualifying the statement by adding *'unnecessary'* duplication/overlap. A definition of what is meant by *unnecessary* would also need to be provided. Any judgement on duplication/overlap would need to be based on a research process to establish what was the 'same' or 'different' about any given programme. Equally, issues of quality, the area targeted (regional or national) whether it is a niche programme or not, and the need for such a programme (number of students) would need to be taken into consideration.

LOOKING AT QUALITY IN PROGRAMME PROVISION

The research suggests that there are clear roles for distance education in a changing higher education system, and that differentiation of institutional focus remains a sensible policy approach. This leads on logically then to the question of how to ensure that programmes

delivered using predominantly distance education methods are of the highest possible quality.

Concerns regarding quality are reflected in the *National Plan for Higher Education*. In establishing the Higher Education Quality Committee (HEQC), the Higher Education Act explicitly recognised that quality issues are central to the notion of a transformed higher education system.

The majority of institutions raised the issue of quality in their submissions to the CHE and during case study interviews as being a very important determining factor in regulating distance education provision. While the issue of access is key to the transformation of higher education in South Africa, it is not sufficient to ensure that students have a fair chance of successfully completing their studies. Key indicators of quality in programme provision are:

- Quality of curriculum design and curriculum support materials;
- Type of support that students receive; and
- Nature of assessment.

Analysis of case study data reveals that quality of design and delivery of distance education programmes is uneven. Some institutions exemplify good practice in every detail, from planning and materials development to one-on-one, work-based support in the mother tongue, while others reflect a range of poor practices from weak learning materials to lack of appropriate student support.

Claims of shifts in pedagogical approach from a teacher/materials-centred approach to a learner-centred approach were typically made by all institutions. Equally, all claimed to be implementing a formative approach to assessment and to be fostering critical and analytical thinking skills in their students. These approaches were discovered to be unevenly applied and at least half the case studies demonstrated little or no evidence that they required any critical thinking on the part of their students. However, in general, there does appear to be a shift towards a more outcomes-based, learner-centred paradigm, albeit rather diffuse at this stage.

Examples of good practice in distance education were identified in the case studies. These include evidence of appropriate preparation for programme delivery and an innovative approach to distance education which:

- Involves thorough situational analysis before embarking on programme design and development;
- Entails research on student profile to inform development of the programme;
- Develops well-structured recognition of prior learning process for admission and accreditation of prior experience and skills;

- Acknowledges the centrality of learning materials in distance education by providing well-developed resources for independent study, with carefully scaffolded conceptual knowledge and skills and that are learner-centred, relevant and accessible;
- Engages students in practical, work-based activities integrating theory into applied contexts;
- Creates enough flexible opportunities for students to develop their conceptual understanding and reflexive skills. (At least half the programmes in the study used a problem-based approach to learning and teaching.);
- Offers ongoing academic support. In two instances mentioned above, support is offered to students in remote rural areas through a network of decentralised learning centres and one-on-one support in the workplace. Feedback is given on all tasks and equally students are given the opportunity to share their experiences with other students;
- Implements continuous, formative assessment strategies. In the majority of programmes, the year mark counted between 20% and 60% towards the final mark allocation. One programme in particular has no traditional examinations, but implements a range of continuous, formative assessment processes including self and peer assessment and portfolio evidence of cumulative study activity and work-based tasks that have been undertaken;
- Includes collaboration with key stakeholders in design and delivery, thus ensuring congruence with specific needs. In two programmes, partnerships have been set up with national departments. There is also one example of a programme in which a provincial department is actively involved in the delivery process and one which is delivered in partnership with a large parastatal.

A number of worrying features of distance education practice that were observed in the case studies include:

- In many programmes, academics spent little time on materials development. International literature on this subject suggests that a minimum of 10 hours of development time should be allocated for every one hour of learner material to ensure quality distance education materials. The case studies showed that, in some instances, only one hour per hour of learner material was invested. Most face-to-face institutions in this study also did not allocate time dedicated to materials development. Academic staff members were expected to integrate this task into the rest of their work schedule.
- The assumption that materials can be made available online without any adaptation was identified in one of the case studies. This research did not reflect any examples in which new ground regarding integrated use of technology was broken. In general, it appeared that technology was seen as an add-on, rather than integrated into pedagogy. Despite this, the assumption that technology is a panacea for the challenges that education presents is reflected in the uncritical presentations made by most institutions.
- The levels of the exit outcomes are questionable in two programmes. In both cases, the curriculum support materials were content-led, relying heavily on rote learning of facts, and did not require or create the opportunity for critical or analytical cognitive processes.

- There is evidence of poor student support in many instances:
  - None of the four dedicated distance education programmes requires students to attend contact sessions. All contact sessions are optional, and some are conditional on the number of students present or even on the students taking the initiative to organise the contact sessions. Attendance ranges between 10% and 20% across all four programmes.
  - On two programmes offered by the dedicated distance institution assignments are also optional and feedback is provided in a generic memorandum/exemplar answer. A multiple choice technique is applied.
  - On the same two programmes offered by the dedicated distance institution, no provision is made for formative assessment. Students register with the institution and gain automatic entry into the examinations at the end of the year. There is no onus on students to participate in the programme as such.

In spite of elaborate infrastructure and administrative support systems and claims that the dedicated distance institutions reach the furthest far-flung corners, they appear to have a very limited reach, focusing on supporting students in select urban areas only. In the context of this limited study, the face-to-face institutions certainly appear better placed to offer comprehensive support to students in their target regions than the dedicated distance institutions. All the face-to-face institutions do, to a greater or lesser extent, offer the kind of support described as desirable in distance education and two in particular offer very extensive, decentralised support to students on their rural-based programmes.

Obtaining data on course pass rates and programme throughput rates has proven to be very difficult, and in most instances required some persistence, as this data was not readily available. This of itself suggests that more attention needs to be paid to setting up the appropriate data capturing and processing and retrieval systems and endorses the need for guidelines on provider readiness.

The case studies demonstrate that throughput rates of distance education programmes at face-to-face institutions are generally considerably better than at the dedicated distance institutions. Throughput figures for distance education programmes at the face-to-face institutions range between 85% and 46% of students that successfully complete the programme, compared with a range of between 25% and 5.4% for programmes offered by the dedicated distance institutions.

ISSUES REQUIRING ADDITIONAL INVESTIGATION

Although not the focus of this research, five specific issues arose a number of times and are thus flagged for further investigation.

Student finance for distance education

Some additional questions need to be asked with regard to student financing of distance education programmes. It appears that currently the only option available to distance education students at face-to-face institutions is to take out a study loan with a commercial funding company. The recently established National Students Funding Aid Scheme (NSFAS) only funds students registered for distance education programmes offered by the dedicated distance institutions, and does not fund any distance education programmes at face-to-face institutions or part-time students. Students having to take out commercial loans for study purposes are often required to pay these back with large interest charges, making studying very expensive.

Student access to computers and e-mail/Internet

As all higher education institutions state their intention to move more and more into ICT enhancement and to migrate programmes and provision of programmes online, the question of student access to computers warrants consideration. Although this issue was not a focus area of this research, it appears from research done by the dedicated distance institutions that between 35% and 40% of students have access to a computer. However, the reliability of these figures as far as actual usage goes has not been put to the test. Interviews with students as part of this research process, and subsequent attempts to contact students enrolled on the programmes in this study, showed that although there might be a computer at the student's place of employment in most instances students were not able to make use of it for learning purposes. Findings from the LLM case study, a postgraduate programme that specifically targets practising advocates and attorneys, show that 30% of the students on this programme do not have access to e-mail. Recent research done by the University of Pretoria[16] shows that, of 1 900 students enrolled on one of three distance education programmes, only 0.4% had access to e-mail.

Although overall access to ICT may be increasing, there is still a need to consider options flagged in the institutional submissions around the provision of a national infrastructure that would support a sustainable network of ICT provision in higher education.

Learning centres

This issue was raised by a number of the stakeholders in their presentations to the CHE Task Team. Strong motivation was presented for a coordinated approach to learning centres.

The 2003 SAUVCA Occasional Paper *Learning Delivery Models in Higher Education in South Africa* makes note of about 200 learning centres throughout South Africa, including

16 The University of Pretoria is not one of the institutions participating in the case study research. However, these figures were presented at a National Association of Distance Education Organisations in South Africa (Nadeosa) conference in August 2003.

the 43 administered by the dedicated distance education institution. In line with SAUVCA's position on this matter, it is envisaged that all public Higher Education institutions should be encouraged to co-operate in establishing shared, properly staffed, well-equipped, jointly financed Higher Education Learning Centres.

These Learning Centres should provide administrative and logistical support and serve as sites for the delivery of open and distance learning programmes with effective teacher-student interaction, access to online library services and access for students to personal computers.

It is suggested that a Task Team be established to investigate mechanisms and procedures for the establishment of such national public higher education learning centres and that the investigation should include a clear definition of what such centres should comprise. It should explore the particular role to be played by the dedicated distance institution in coordinating these centres and look at potential partnerships with other Departmental initiatives in establishing multi-purpose centres.

Language issues

Questions possibly need to be asked regarding language. The case study research clearly shows that the majority of students are not first-language English speakers, yet all programmes are offered in English. With the exception of the B Prim Ed programme, where tutoring and support are offered in the mother tongue, there is no evidence that any of the other institutions offer any sort of language support at all. A number of institutions raised this as a concern, but little appears to have been done about this issue to date.

Expansion into Africa

Finally, new markets for distance education are opening at a rapid rate, especially on the rest of the African continent. This clearly presents great potential and opportunities for 'exporting' distance education programmes, but equally raises the question of how best to coordinate and regulate such expansion.

CONCLUSION

While the notion that higher education programmes exist on a continuum running from provision purely at a distance to provision that is purely face-to-face holds value conceptually, both the research discussed and a broader base of evidence indicates that the vast majority of educational provision still tends towards one or other pole of this continuum. Similarly, the research indicates that, although the development of ICT has introduced some new educational methods that are not easily categorised as one or the other, there is no evidence to support the notion that there is general convergence between distance and face-to-face methods of educational delivery.

Arguments in favour of continuing to invest in programmes that use predominantly distance education methods – as have been presented in the first part of this chapter – and for continuing differentiation in broad institutional roles do not by themselves offer any guarantees about the quality of distance education delivery. The case study research has revealed that, despite pockets of excellence, there remain serious problems with the design and implementation of distance education delivery. This suggests a clear need for initiatives to assure the quality of distance education delivery in order to ensure that it achieves its true potential. Proposed strategies in this regard are discussed separately in Chapter Six. However, many institutional submissions have noted that distance education delivery cannot achieve its potential because of funding constraints imposed through differentiation between distance and face-to-face education in current funding formulae. Thus, it is important first to consider the validity of these claims.

The same observation may be true of predominantly face-to-face education but such considerations extended beyond the brief of this research.

FINANCING DISTANCE EDUCATION PROGRAMMES IN SOUTH AFRICAN HIGHER EDUCATION

INTRODUCTION

This chapter explores a range of issues pertaining to financing distance education programmes in South African higher education. It begins by presenting a brief summary[17] of the financial logic of distance education, drawing on references from international literature and best practice. It then turns its attention to distance education delivery in the South African higher education system, presenting research completed by SAIDE for the Council on the Higher Education (CHE) during 2003 on the costs of financing distance education programmes in higher education system in South Africa. Building on this primary research, it explores options for this funding and draws on analysis of the literature on distance education costing internationally, South African policy documents on the matter, and empirical research conducted by SAIDE. It presents some tentative recommendations on the funding of distance education, with a view to stimulating further debate on appropriate models for the country.

THE FINANCIAL LOGIC OF DISTANCE EDUCATION

> Ideological arguments are made for open learning, economic ones for distance education. If it can produce similar results to those of conventional education at a lower cost, then distance education has a powerful appeal.
>
> There are grounds for thinking that distance education may have economic advantages. There are two cornerstones to the argument. The educational cornerstone is the theory of media equivalence: that there are no significant differences in the effectiveness of different educational media … The economic cornerstone … Distance education allows a division of labour, in which a group of teachers and producers manufactures teaching material, an organisational machine distributes it, and another group provides a minimum of individualised tutorial support to the students. Economies of scale become possible, provided there are enough students to justify the manufacturing cost of the first group and student contact is kept down to contain the costs of the second. (Perraton, 2000: 119)

The financial logic of introducing distance education has, in many ways, been a response to education systems that are in crisis because they are pushing against their speakng teachers' ceiling capacity to manage the learning of incoming students. The methods of what became known as distance education offered some hope that the productivity of education systems could be substantially raised to meet the kinds of demands outlined in the table below. Distance educators have also long held that the quality of educational experience for students can also be improved by proper use of those methods. This is because they introduce greater flexibility into the system, enabling students to study in ways, places and times that best suit their personal circumstances.

17 This section of the chapter draws heavily on a document prepared by Neil Butcher and Nicki Roberts which will be published in Perraton, Hilary and Lentell, Helen (eds) (2004) *Policy for Open and Distance Learning*, London and New York: Routledge Falmer and The Commonwealth of Learning.

By such methods, institutions can reach students who would not otherwise be drawn into education systems. Finally, they also support, and encourage, highly desirable system developments towards internally generated quality assurance and accountability. Evidence of the strength of this argument is that, increasingly, these lessons are being integrated into traditional education systems.

However, it has become a dangerous piece of conventional wisdom that distance education is less expensive than traditional contact education. There are many ways in which that is not true. At present, many education systems in the developing world are looking to distance education because it seems to offer cost-efficiency benefits. However, they tend to ask the question: 'Is distance education cheaper than contact?' – as though distance education were a set of social arrangements as standardised as contact education.

Research on comparative costs has not been undertaken on a consistent or comprehensive enough basis. Some studies have looked at institutional costs, others at public expenditure costs, and still others at total economic costs. Some have examined recurrent costs but neglected capital costs. The accumulated research literature on the cost-efficiency/effectiveness of distance education does suggest two fundamental conclusions:

1. Distance education institutions are usually more cost-efficient than conventional institutions, particularly when they enrol large numbers of students on each course in order to reap large economies of scale; and
2. Distance education institutions *can* be more cost-effective than conventional institutions when they offer high-quality learning materials and tutorial support for students, thereby securing satisfactory retention and graduation rates. Conversely, if they do not achieve satisfactory retention and graduation rates they may well be much more expensive (Dhanarajan et al., 1994).

In distance education, major expenses are incurred in designing courses – particularly if they involve the use of 'expensive' media and technologies. This is potentially a bottomless pit of expense, since it is always possible to add more person-power or seek more expensive media and technologies, but it need not be. Many good courses have been designed with relatively small amounts of person power. However, the world of distance education contains many times more bad courses than good ones. A broad generalisation that has fairly high reliability for distance education is that the quality of the course (subject matter and pedagogy) is related to the level of investment in its design.

Taking time to design

Perhaps the first mistake that politicians and educational planners make is to grossly underestimate the amount of person-power needed to design one notional hour of student learning time. Bedazzled by the cost-efficiency claims of distance educators, they regard distance education as merely another, less expensive, type of school and proceed to plan its

costs in similar ways. Instead, the budget for distance education should be built up from a detailed costing of the design and presentation costs of each of its proposed courses. The first stage involves considering the level of investment to be made in the design of each course. While this decision involves an enormous amount of rule of thumb and guesswork, it is a necessary process for initial decision-making, because it all depends on the media mix, level and type of subject matter, and the kinds of competence aimed for in the course. Some crude generalisations are likely to bring recognition of reality, if not firm agreement, from those involved. At higher education first year level (perhaps the most challenging), the following table (Swift, 1996), provides some indication of the kinds of investment required:

Table 4: Illustrative design time estimates

Time taken to design one notional nour of student learning time	
Print	20 – 100 hours
Audio	20 – 100 hours
Video	50 – 200 hours
Computer-based instruction	200 – 300 hours
Experiments	200 – 300 hours

However a particular institution might diverge from these figures, two core agreements would be likely to emerge. First, at the lower end of each of these ranges, the quality of teaching (i.e. capacity to bring success to students) will be positively related to investment in design time. Disagreements might arise about the strength of the relationship at the top end, with returns to additional investment drying up beyond a certain point. It might be that an additional 20 hours after the first 50 might only bring a small improvement, raising the possibility that it would have been more profitably invested in some other part of the system. Second, there is a point at the lower end below which it is not worth going – the likely failure rate, and/or poor quality of exit performance, make it unlikely that the investment will be justified in comparison with face-to-face provision. Falling below that lower figure runs the risk of an inadequately prepared course which must be compensated for by excessive amounts of teaching person power in its presentation, or a high failure rate, or a lowering of exit performance standards, or most likely all three. Unfortunately, large amounts of distance education practice internationally appear to have been pitched below this level.

A further complication in the ultimate budget for the design of a course follows from real or accidental decisions about the proportion of hours of the course allocated to each medium in the course. Each is likely to make up a very different 'weight' of notional learning time and may not necessarily play a proportionate role in equipping a student for success.

Finally, design time itself is not a stable quantum. It is worth considering that, in each medium, and in the course overall, different combinations of expertise might have different effects on student performance, as shown in Table 5.

Table 5: Examples of course development teams

Course Team A		*Course Team B*	
Academic	95%	Academic	50%
Editor	5%	Instructional designer	20%
		Media specialist	20%
		Editor	5%
		Designer	5%

All other elements being equal, it is reasonable to assume that, if the two teams put in the same total amount of design time, it is likely that Team B will produce a more successful course.

Costs of design are incurred regardless of the number of students who take the course. Low unit costs then follow only if very large numbers of students take it successfully and the person power devoted to 'presenting' the course is substantially lower than in face-to-face settings.

The costs of teachers in traditional institutions are directly related to student numbers. Even more importantly, their magnitude is so great as to make all other aspects of variable costs relatively trivial. (For example, the cost of teachers' salaries in schools in South Africa is around 80% of all costs. In higher education it is lower but not substantially so.) Distance education therefore changes the production function of education by substituting cheaper management of students' learning for the expensive process of applying teacher time to it. This creates potential for lower costs per student, *provided* large numbers of students can take the expensively designed course and that the resulting unit cost advantage is not eroded by the lower success rate that is likely to ensue.

In successful distance education systems, as much attention is given to presentation or teaching of courses as to their preparation. Where they are well-resourced and judiciously deployed, high quality materials and learner support systems can reap substantial benefits in improved completion rates and thus enhanced cost-effectiveness. That is how distance education institutions can be more cost-effective than conventional institutions.

Comparative costs

Lessons from higher education

Care needs to be taken in using measures of effectiveness that are appropriate to distance education institutions. Most of them, and particularly those concerned with lifelong learning, aim to ensure that as many students as possible attain their various learning objectives, whatever these may be. In some cases this is a degree but in others it may be a certificate or diploma, a single course credit, or a short updating course successfully completed. Graduation is therefore not the only successful outcome of study.

In addition, several distance education institutions operate an open admissions policy and are committed to offering higher education to those who lack traditional entry qualifications. Success rates for those students are inevitably lower than for qualified students selected for entry to conventional universities. Nevertheless, institutions with such policies may be adding more value in personal and social benefit than the conventional universities.

Regrettably, measures of cost based on units of education achieved other than degrees and on concepts of 'value-added' are not yet widely used. This leaves only less satisfactory measures such as cost per registered full-time equivalent year of study. Such calculations greatly favour distance education institutions because their very much lower course pass rates are not brought into the equation. On the other hand, calculations based only on successful graduations favour conventional institutions because distance education students who are satisfied with partial completion of a programme are ignored and their costs charged to graduations. Nevertheless, even on this limited criterion of success, distance education institutions with high quality materials and tutorial support score well (although those without score very badly).

Early studies of the UK Open University (OU), for example, indicated that it produced graduates at something over half the cost of other universities. A confidential study undertaken by the Department of Education and Science in 1981 found that a three-year FTE degree at the OU cost £4 890 compared to an average of £8 550 in other universities. A four-year FTE degree cost £7 984 at the OU and £11 842 elsewhere. The differences were even greater when calculated in terms of public fund costs (£4 356 compared to £10 801 for a three-year FTE degree) and total economic costs (£7 116 compared to £17 843) (Department of Education and Science, 1981). The differentials have narrowed somewhat since 1981 because the proportion of under-qualified students entering the OU has increased and unit costs in other universities have fallen – but a more recent calculation put the cost of an OU graduate at less than two-thirds that of a full-time graduate in other universities (Horlock, 1984).

A further confidential study, undertaken by the Department for Education and Science in 1991, compared the cost of OU degrees with part-time degrees offered by three conventional institutions. It found that a three year FTE degree at the OU costs less than 60% of the average of the other universities. These are impressive statistics, but they are not unique. Other distance universities with similar teaching systems achieve similar rates. For example, the Allama Iqbal Open University in Pakistan, which is modelled on the UK OU, achieves costs per graduate that are 45%–70% of the cost of conventional universities (Perraton 1994: 21).

The then Open Learning Institute of Hong Kong made heavy use of existing distance teaching materials from the OU and elsewhere and married these with highly-resourced student support arrangements when it started up. As a break-even institution, it was required to charge students the full cost of their courses. Its graduates paid about one-third of what a

similar degree at the University of Hong Kong (Swift and Dhanarajan, 1992) cost at the time. Currently, the available literature offers very little insight into the costs of DEOL (Distance Education and Open Learning) provision in sub-Saharan Africa and hence the motivation for this report.

There is another variation on the question of returns on investment in distance education. Few distance education specialists in Australia would accept a general argument that distance education is cheaper than residential, because in Australia it is not. This is because, in general, the methods are used for purposes other than cheapness and, inevitably, on small numbers. The most precise study of costs in which educational outcomes were identical, was conducted at the University of Southern Queensland (USQ), comparing the cost of its distance and residential education. The conclusion was that the costs were broadly comparable. The advantages of adding distance education to conventional provision were *political*, in the sense that a wider clientele of students was being served, *institutional* in that a small institution was able to increase its size, giving both generalised cost-efficiency benefits and greater weight on the higher education institutional battlefield, and *educational*, in that use of distance education methods across all fields encouraged pedagogical quality. Some income and staff development benefit was also derived from 'off-shore' registrations in Asian countries.

The studies of the UK OU and the USQ elucidate only some of the benefits of the range of distance education methods, because neither institution uses all of them. Each also dealt with only a specific range of possibilities amongst the clientele (Taylor & White, 1991). USQ had small numbers of students on a large number of courses; two important causes of high costs. The OU has an open entry policy; very expensive course-design strategies; a short (thirty-two week) studying year; a slow registration procedure, and for most of its life has been grossly restricted in the numbers it was permitted to enrol. In these ways the cost efficiency of its degree structures, particularly in science and technology, has been retarded.

The course production methods of the two institutions are almost at the two extremes of expensiveness – the OU spending up to £4m to prepare a course equivalent to one eighth of a four year honours degree while USQ spends a small fraction of that amount. In summary, the OU, despite limitations on its numbers set by government policy and challenges to its teaching system of open entry, was nevertheless big enough (in course registrations) with a small enough number of courses, to produce a particular level of cost advantage (up to 40% cheaper) over its competitors. USQ had no chance of achieving similar numbers and therefore the expensive course was not an option; nor was it likely to gain a cost advantage over conventional delivery.

Studies also reveal, however, that distance education institutions that do not invest in high quality materials and student support systems achieve much lower completion rates and therefore lower cost-effectiveness rates than the OU and, indeed, than conventional universities. In the early 1990s, for example, The International Correspondence School in the USA was providing materials but no student support and taking no action to monitor student

progress. Completion rates were less than 15%. The consequences of low completion rates can be catastrophic to cost-effectiveness if the most challenging criterion – graduation rates – is used as the sole measure of educational value added. A study by John Daniel of data supplied by the ten largest distance education universities illustrates the point. He found that these 'mega universities' taught their students at between 10 and 50 percent of the average cost of the other universities in their countries (Daniel, 1995). However, they were less likely to bring their students to the point of graduation. Where graduation rates are an important aspect of the higher education system, that cost advantage is diminished by the ratio of the difference between the two forms.

Considering other education sectors

The same financial challenges exist when transporting the logic of distance education into sectors other than higher education. Internationally, there has been growing interest in introducing Open Schools.[18] While there are varying motivations for the introduction of such schools (discussed further below), a common motivation when such projects are aimed at younger learners as an alternative to mainstream schooling is usually to reduce the cost of providing education. Evidence from around the world suggests that Open Schools tend to succeed in this regard, as the following excerpt illustrates (Perraton, 2000: 126–27):

Table 6: Costs of some school equivalency projects

Country, project, date	*GNP per capita at date of study*		*Student numbers*	*Cost per learner US$*	*Comparative cost*
	Current US$	*1998 US$*			
Brazil, Bahia State, Madureza, 1976	1 410	3 793	8 000	$418 per student following three courses	Higher cost per student than alternative
Brazil, Minerva, 1977	1 410	3 793	118 118	$49 per student following group of courses for 1 year	Costs 65% of private sector alternative; no evidence on cost per successful student
India, National Open School, 1990	360	449	40 885	$44 per student p.a.	63% of cost of government school
	Current US$	*1998 US$*			

18 As used here, an *Open School* refers to an educational institution operating in the spheres of primary and/or secondary education, providing courses and programmes predominantly through use of distance education methods.

Country, project, date	*GNP per capita at date of study*		*Student numbers*	*Cost per learner US$*	*Comparative cost*
Malawi Correspondence Study Centres, 1978	150	404	2 884	$399 per student; $2 794 per examination pass	Cost per student 62% cost at day school; cost per pass 81% higher
– 1988	160	220	17 000	$107 per student; $378 per pass	Cost per pass reduced to 34% of day school rates
Mexico Telesecundaria, 1975	1 160	3 514	33 840	$589 per student	Cost per student 76% of alternative
– 1981	3 170	5 684	170 000	$927 per student	Cost per student 9.5% higher than alternative
– 1988	1 860	2 563	>400 000	$441 per student	Cost per student 32% of alternative
– 1997	3 680	739	767 700	$562 per student	
Zambia Correspondence Study Centres, 1981	600	1 076	11 800	Cost per student in range $102–291	Cost per student 7%–21% of day school

Again, however, these comparative costs should be read in combination with several of the other points made in this report. They do not, by themselves, create an argument in favour of introducing distance education methods, as the educational implications of this need to be weighed up against any likely financial efficiencies.

Considering relative financial benefits

There is ample evidence that the methods of distance education can be used to greatly increase the productivity of education systems. Prima facie, the evidence and the logic of analysis seem indisputable. However, two kinds of environing arguments can introduce doubt. The first is educational and the second macro-economic. The educational rebuttal asserts that any dilution of the intense personal interaction between educator and learner will weaken the quality of the learner's experience. Even if many more students are taught, even if they achieve the exit performance levels of the old system, something will be lost. Few would disagree with this if two extremes are compared – an Oxford personal tutorial relationship with a correspondence course – but one is not possible and the other is not proposed. In between, we are left with the educator's responsibility for managing the highest quality learning experiences for as many people as possible at the lowest cost.

Experience elsewhere demonstrates that the quality of distance education can be as good as the best conventional teaching. In the UK, where the quality of higher education provision is being assessed by peer review according to a set of common criteria, the OU provision has been judged 'excellent' (the top rating) in almost half of all subjects so far assessed, putting it in the top 12 of 120 HE institutions (Swift, 1996).

The second environing rebuttal is to do with the minutiae of economic costing. Well-established, large-scale distance education institutions are easily capable of producing educational outputs equivalent to those of traditional institutions, whether expressed in certificates obtained or, even more easily, per full-time equivalent year of study. However, they often do so partly by taking advantage of the historic investment in the people and facilities of the wider system. To the extent that any educational gain brings cost benefits that are distributed in favour of the distance education institution, calculations that do not take this into account will be biased. For example, do the charges made by traditional institutions for use of their classrooms, laboratories, accommodation and ancillary staff represent true cost or marginal cost? If the latter, they could be said to be subsidising distance education. This kind of question, however, only has relevance in inter-institutional comparison. All would agree that the system benefits because output is increased from the same quantity of historical investment in expertise and capital equipment.

Equally difficult to quantify will be how much degrees obtained through distance education contribute to life time earnings. To the extent that distance education students have a much wider age range, they could be said, as a group, to have a lower working life expectancy. If many of them are in employment it may also be difficult to ascribe future earnings to the act of graduation. Traditional analysis of returns to investment tends to assume a fully causal link. On the other hand, because most distance education students are studying part-time while in employment, they continue to contribute to the Gross National Product, paying taxes and (probably) paying a higher proportion of the costs of their education in fees. These environing arguments can be ignored for the present purposes. They either work in favour of the cost-benefit advantage of distance education against residential education or they bring system benefits. As lifelong learning gains hold around the world, the economic advantage of distance education over so-called full-time residential education will begin to be demonstrated.

The issue of national need

One implication of the foregoing analysis is that distance education offers a very much wider and more detailed range of alternatives to the educational policy-maker or planner than does traditional education. This wide range, unfortunately, includes not only unconscionable amounts of failure but also excessive and unproductive expenditure. Measurement of cost efficiency and effectiveness is therefore a key to the assessment of an institution's performance.

There is a further implication, which is well illustrated at the higher education level. Quite the most crucial policy difference between distance education institutions of economically

developed countries and those in the developing world is that the latter must provide important elements in provision for *traditional university entrance cohorts*. In developed countries their functions are usually seen to be that of extending 'second chance' opportunities and enhancing the lifelong learning capacities of the system. Consequently, their responsibilities can be expected to be very different. The following table outlines some expected differences between distance education universities in developed and developing countries:

Table 7: Comparison of developed and developing countries responses to meeting national needs in higher education provision

Developed countries	*Developing countries*
Curriculum may well be vocational, interest-directed, flexible, non-traditional, experimental.	Curriculum must be that thought to be necessary for school leavers.
Curriculum may range broadly.	Curriculum should concentrate on subjects of national need.
Graduation rates and speeds are less important than other, more general educational objectives.	Graduation rates and speeds are of primary importance.
Student support may assume maturity of students and infrastructural support for independent learning.	Student support in all its aspects will be crucial in early years of study.
Student counselling may concentrate on use of the learning system.	Student counselling may play an important part in directing student careers.
Cost per unit of educational output may not be important.	Cost per unit of educational output must be important since other forms of education are under-funded.

For this reason, whilst international institutions may have much to offer on a wide range of techniques, strategies, systems and philosophy, it is essential to consider separately the nation's policy in funding a given institution or programme. For example, a relatively rich country may fund a distance education university for 'second chance' and personal enrichment purposes. In this case, the institution performs functions marginal to those of mainstream education. Graduation rates and the subjects within which graduations occur may not be of particular importance. The general contributions to adult education, to the flexibility of the system, and to satisfaction of the electorate are looked upon as proper returns to tax revenue. At the same time, because the students are adult, possibly already qualified, and pursuing personal or economic interests, it is also possible to countenance high failure in graduation rates, depending upon the cost of the various units of output.

It would be difficult to imagine a developing country substantially funding distance education with any of these functions or results as primary objectives or even acceptable consequences.

Similar differences can be found in exploring the development of open schools. Many countries around the world, when faced with problems of learner access to conventional

schooling systems, have implemented some or other form of Open School as a response to these problems. However, the reasons for establishing such systems are many and varied, depending on the context in which they are implemented. The Correspondence School in New Zealand, for example, was established in 1922, while the Open School in India is over 20 years old. Reasons for establishing such schools have tended to revolve around accessibility to traditional schooling. In the two examples mentioned above, part of the motivation for establishing the School was to provide access to students in remote farming communities (New Zealand) and to large numbers of students the mainstream schooling system could not absorb (India). The financial analysis above has illustrated the potential such approaches have for reducing costs per learner (even per successful learner), but this of course needs to take into account some of the dangers of introducing distance education simply because it reduces cost. Consequently, in the next section, we focus attention on some common problems and mistakes that often accompany the implementation of distance education in the developing world.

Reviewing the cost of distance education delivery in South Africa

Research approach

As we have noted, financial data on distance education delivery is extremely limited with regard to developing countries and South Africa in particular and often does not offer insight into the economics of mixed mode institutions offering distance education courses.

As a result, using the ten case studies, we embarked on a primary research process to establish the costs of a representative range of distance education courses in South African higher education. Realising that, at programme and course level, we would often be working with academics with limited or no financial background, we decided that it would be necessary to design questionnaires and processes that would be meaningful and accessible to all concerned and at the same time offer an opportunity for promoting useful reflection on practice.

For the purposes of this exercise, we have developed a costing model that works on a Microsoft Access database platform and which requires of the user neither prior budgeting experience nor any complex calculations. A questionnaire has been developed to guide the collection of data (as set out in Background Paper 3). The data from the questionnaire is then entered into the costing database model and a report generated which offers an overview of costs.

Trying to select across a range of criteria, we then identified ten distance education programmes at different higher education institutions, with which we conducted extensive case study analysis (reported on elsewhere). As part of developing the case studies, we selected a single course from each programme for the above financial analysis. Given the potential sensitivity of the data provided, we have chosen not to identify particular course data with particular institutions. Thus we will discuss each of the case studies numerically on the basis of the degree of learner support and the level of curriculum design involved.

The case studies are thus presented approximately on a continuum stretching from largely print-based, correspondence provision to courses that have invested heavily in curriculum and materials design and provide extensive learner support using multiple media.

Collecting the data involved a process of gathering preliminary information, often requiring initial assumptions in the absence of the necessary verifiable data, and using the costing model to generate an initial report. Having generated a first report, it has usually then been necessary to revisit some of the initial assumptions and/or gather more information to refine the data. We have then used the model to ascertain the impact of:

- Student numbers halving in a period where fixed costs of, for example, full-time staff cannot be adjusted; and
- Student numbers increasing within the tolerance of existing fixed resources.

Core assumptions

Unless the data provided has indicated otherwise, we have made the following core assumptions:

- An academic year comprises 170 chargeable days of 8 hours;
- Academic staff at higher education institutions devote 20% of their time to pure research;
- For every one hour of academic staff time, we assume one hour of administrative time; and
- Overhead costs can be estimated at 30%.

Overhead costs are assumed to cover plant and maintenance, senior management and support services such as finance, human resource management, and library services. We have also attempted to gather information on specific course level costs, such as renting offices specifically to run a course or travelling to quality assure contact sessions at the level of other course costs. These costs are considered as additional to the 30% overhead.

Although in practice there may be differences in these figures across institutions, we have not been successful in gathering this type of institutional data from central financial departments within the institutions that we reviewed. Nevertheless, we remain confident that the process yields comparable data, as the same assumptions have been applied to all courses that we analysed.

Limitations of the research

This research exercise, despite being the most rigorous systemic effort to cost distance education provision in higher education across the different institutions of which we are aware, remains limited in various key respects. These are noted below, and we believe that ongoing investment in the costing of delivery will further improve the quality of policy decisions over time.

- Our research has only enabled us to consider the costs of individual courses within distance education programmes. A more thorough analysis of the costs of programmes is also required at some point, as this provides the only meaningful basis for calculating the true costs of student throughput (where throughput is seen as successful completion by students of an entire programme, rather than simply successful completion of individual courses).
- Extracting relevant financial data and cost-drivers from institutional financial departments remains an inordinately complicated task. We have devoted a section to discussing this problem below, but have had to rely on a series of assumptions in our costing models to counteract the paucity of relevant financial data made available to programme coordinators in institutions. Although our evidence is anecdotal, we believe that this lack of a financial planning culture within institutions is a serious enough problem to justify extensive investigation and support to institutions (across distance and face-to-face education) in resolving it. Despite these problems, we are confident that the results of our research remain valid as we have applied key assumptions uniformly across our case studies (thus ensuring internal comparability of results).
- Most seriously, we have had no space to do comparative costing of different variations of predominantly face-to-face education courses. We believe that such analysis is urgently required to further strengthen the analysis emerging from our research, particularly with a view to comparing the relative financial benefits of different educational modes of delivery.

Some general findings

In this report we present some of the general findings emerging from this research process. This is supplemented by a much more detailed research report – see Background Paper 3.

Lack of a financial planning culture

Gathering the necessary data for this costing exercise proved quite difficult. Many of the course and programme coordinators with whom we engaged lacked basic information regarding the costing of their courses. This is a major problem that continues to plague the higher education system, which SAIDE has noted repeatedly during six years of conducting financial planning processes across a diverse range of higher education institutions.

As a result, financial analysis is frequently absent, which often results in the spread of widespread systemic inefficiencies across both distance and contact education provision. More importantly, though, it has meant that, in several cases, decisions to introduce distance education courses and programmes are not based on any sound financial argument, but rather on a vague notion that distance education is 'cheaper'.

Where financial planning is done, it has tended to focus narrowly on the direct costs of a course or programme, rather than on understanding the full direct and indirect costs necessary to sustain both the educational intervention and the educational provider itself.

Usually these errors of omission are symptomatic of a culture of financial dependence, in which institutions that have regularly received funding from a guaranteed source (usually the government fiscus) have not been required to engage seriously with strategies to ensure their own financial sustainability.

Linked to the above, a key problem that many educational planners have faced is not knowing whether or not the courses and programmes they are designing or implementing are generating more income than expenditure. Careful analysis of all the associated costs of a course or programme is the only meaningful way to overcome this problem. Distance education planning, however, also introduces the need to project costs over time and student numbers. This is because it is predicated on the logic that up-front investments in design and development of courses and administrative systems will be amortised over time and large student numbers. It is, therefore, not reasonable to expect a distance education programme to generate more income than expense (or at least as much) in a single year. However, such financial sustainability needs to be achieved over a cycle of a number of years. Without undertaking such calculations, it becomes impossible to establish when – if ever – new courses and programmes will break even financially, hence making it harder to make effective financial decisions on whether or not to make initial design and development investments.

Although many, but not all, programme or course coordinators were able to tell us what the student fee was for the course for which they were responsible, none were able to give us the actual government subsidy. In the absence of useful feedback, many programme and course coordinators seem to operate on the assumption that because their programmes have not been closed down they must be operating in a financially sound way!

In some institutions, academic staff are not required to submit a budget with a new curriculum proposal. All budgeting and costing is handled separately by the Finance Department. Where staff are required to submit budgets, they must often do so with very little guidance and support. Very few course or programme coordinators were able to supply us with historical cost reporting for their particular courses. This means much planning and budgeting has to take place in a vacuum, and where budgets are submitted they are often simply accepted and no follow-up reporting is provided.

With regard to personnel, different institutions use different terms to describe similar job functions, and very often salaries are regarded as confidential information. In such cases we have usually been able to identify the salary range at a particular level and have then taken an average of this range. Some of the staff with whom we engaged have never considered their own time in terms of the cost to the course; they assume that as full-time employees they are simply part of the overheads of the institution. In addition, most of the staff with whom we engaged work on multiple courses and do not keep timesheets. This meant that having estimated how much time it would take to complete a particular task, they were often not able to see whether the resulting calculation, for example, time spent on course design, was realistic or not.

As noted earlier, many (though not all) of the programme and course coordinators with whom we engaged were operating largely in a vacuum with regard to the actual income and expenditure for the courses for which they were responsible. In most cases, at course level, coordinators felt that they had to operate within the income generated by student fees and any additional funding they could generate themselves, while government subsidies did not find their way down to the course level but were 'lost' somewhere in central financial administration. At the course level, coordinators were generally content with an assumption of a 30% contribution to overheads, but were often unable to give details of the kind of fixed and variable "other" costs associated with a particular course; that is, costs that the institution incurs that it would not incur if that particular course were not offered.

Generally our sense was that many programme and course coordinators still need to be empowered with planning and budgeting tools and expertise; that there needs to be a concerted effort by institutions towards activity- and course-based costing; that regular reporting on the financial health of a course or programme is currently not a common phenomenon, and that academic staff need to keep better records of how they utilize their time.

In general, programme and course personnel with whom we engaged did not 'enjoy' the exercise. However, many subsequently observed that, difficult though it was, engaging with the kinds of questions that emerged gave them new insights into what they were doing.

Looking at enrolment and throughput

Throughput figures are often not readily available and, where they are available, there is often an enormous difference between course and programme throughput. In one instance we encountered a course where throughput at the course level averaged between 50 and 60% but throughput at the associated programme or qualification level was less than 1% within the minimum time and as low as 5.4% within three times the minimum time.

In many instances, programme and course coordinators had not thought about how enrolment might be expected to grow or decrease in subsequent years.

Considering learner support

Most of the courses that formed part of this research offer some form of contact support strategy. The most common strategies are:

- Individual consultations in person or by telephone (and to a much lesser extent by e-mail);
- Face-to-face contact sessions/workshops; and
- Satellite television broadcasts.

One factor that made costing difficult was that it was not always clear how many students had access to and took advantage of the support that was offered. Several of the case study courses offer contact workshops, for example, but these were sometimes not offered in multiple decentralised venues. As a consequence, only a small percentage of students then had access to and made use of the support that was offered. In costing this form of provision, therefore, we wished to explore the possible implications of opening access and offering this form of support to all the students on the course, in contrast to what seemed to be the actual present case.

A similar problem existed with individual consultations. Course personnel were often extremely vague about how much time they spent in individual consultation with students, whether in person, or more indirectly by telephone and e-mail. Very often, a course will be managed from a centralised venue and so students must travel to that venue or make a long-distance telephone call in order to seek advice. (In general, e-mail was not commonly used by the students engaged on the courses that we investigated.) The costs involved in accessing support then become a barrier to such access and the take-up is low. However, course personnel would often estimate that they would spend a certain amount of time with each student, even though when extrapolated to all the students on the course, the amount of time spent on individual consultation was clearly unrealistic. What we tried to do in this instance was have course personnel reflect on the total amount of time they spent each week on individual consultation and then divide this by the number of students on the programme. Creating this ratio would then allow us to extrapolate the effects of increased or decreased student enrolments in terms of personnel time and costs.

Where decentralised contact support is offered, courses will often employ external tutors. In most cases tutors are paid only for the time actually spent in contact sessions or for the actual number of scripts marked; they are not usually paid for their preparation time.

Notional learning hours and course design

For contact support, assessment, and independent study we tried also to capture data on the estimated student time spent on these activities, which builds cumulatively to the total notional learning hours of the course. There was often initially a large discrepancy between the notional credits attached to a course and the actual learning time generated from a consideration of the various learning activities with which students engaged. Apart from being interested in whether the workload for students seemed reasonable, we wanted to determine the notional learning hours for a particular course, as this is useful in providing insight into the actual course design time per student hour, for which some international benchmarks exist. In many of the courses we looked at, the course design time was not even one hour of design for one hour of student study, which is considerably below international benchmarks. In one or two cases, where course personnel were not sure about the time that had been spent on the course design process, using a notional ratio of 10 hours per notional learning hour generated results that were clearly out of line with the actual costs incurred by the programme, even when extrapolated over a three to five year design cycle.

Summary of case study information

In Table 8, below, we summarise data gathered from the ten case studies we compiled. Detailed case study reports are contained in Background Paper 3.

There has been and remains considerable discussion about the exact nature of distance education in the context of rapid development of information and communication technologies, and the literature increasingly talks about a blurring of the boundaries between distance education and more traditional classroom-based provision. The trend seems to be that institutions formerly offering correspondence forms of distance education have come under pressure to provide more learner support, particularly in the form of direct contact, whether in a discussion class, a teleconference, or by e-mail. On the other hand, more traditional providers have found themselves under pressure to increase access to more learners both for philosophical and financial reasons and they have increasingly begun to make use of resource-based strategies for the provision of learning opportunities.

The case studies that formed part of the CHE study seemed to confirm the blurring of boundaries but at the same time to affirm that there are still extremes of practice. In organising the summary of case studies in the following table, we have chosen to emphasise this trend and to explore the consequences for costing. Thus at the left of Table 8 we have clustered those courses which offer a print-based correspondence experience for most students (but not all). At the right, the opposite end of the spectrum, we have clustered courses for which traditional face-to-face interaction forms a key and integral aspect of the course for all learners registered. The courses in the middle of the table represent examples of mixed mode delivery, with an increasing emphasis on the importance of direct face-to-face engagement as we move from left to right.

For each case study, we have summarised the following information, which is presented in Table 8:

- Level – This row specifies the level of the course, whether an undergraduate (U/G) or postgraduate (P/G) programme.
- Notional learning hours – This relates to how much time the average student is expected to spend in various forms of engagement with the programme, including participation in educational strategies such as contact classes, teleconferences, and e-mail discussions, time spent in independent study of course materials, time spent in individual consultation with course staff members (usually by telephone), and time spent preparing for and completing assessment requirements. The National Qualifications Framework (NQF) assumes a full-year programme to comprise 120 credits or 1 200 notional learning hours. Increasingly, we see courses modularised at 12 credits or 120 notional learning hours per module. In some examples, we have included in brackets an estimate of what we or the programme managers expected the notional learning hours for the case study course to be. As can be seen, in many cases it becomes necessary to go back to institutions to

re-examine assumptions about student learning time (a useful educational by-product of the costing exercise).

- Enrolment – The third row details current enrolment on the course in terms of actual student numbers (not FTEs).
- Contact support – The fourth row summarises the nature of contact support offered by the programme, as this appears to be a distinguishing characteristic with respect to the blurring of boundaries between distance and more traditionally face-to-face forms of education provision.
- Assessment design – The fifth row summarises the nature of assessment used by the programme, as we concur with Rowntree that the assessment practice very often is a prime indicator of the de facto curriculum and intent.
- Course design time (hours per learning hour) – In the sixth row, we have tried to deduce from the data made available the ratio of course design time required per student study hour.
- Materials – The seventh row summarises the nature of core materials. This remains print-based in the ten case study institutions, with ICT usually being used as a support mechanism rather than for core learning experiences.
- Student fees – the eighth row gives the fees charged to students for the offering described.
- Cost per student in Rands – The ninth row then details the cost per student. (For case studies 1, 2 and 3 we include two scenarios based on providing the contact-based support offered in the programme to all learners in a decentralised way, and the current reality in which only about 10% of learners have access to the contact-based support. In case study 6, we again have two scenarios based on an initial estimate of 10 hours of design time per student learning hour and the reality based on actual salaries paid, which suggests a much lower ratio.
- Financial status – The tenth row presents the difference between the fees paid by students and the actual costs of offering the course. Thus, where the total cost is less than student fees, then we indicate that the course is profitable or that it at least breaks even on student fees. The purpose of this is to illustrate the extent to which it is or is not necessary to subsidise the programme, whether internally from another programme or externally through a funding grant from the government or another source.
- Cost per successful student – The eleventh row takes into account the course pass rates for the past three years where possible, in order to obtain an estimate of the cost per successful student, again for two scenarios in some cases.
- Rows twelve and thirteen then engage in some scenario-planning to explore the ways in which changes in student enrolment can impact on costs.

Table 8: Summary of case study information – see previous pages for explanation of the items

Item	Case 1	Case 2	Case 3	Case 4	Case 5	Case 6	Case 7	Case 8	Case 9	Case 10
1. Level	U/G	U/G	U/G	P/G	U/G	P/G	U/G	U/G	U/G	U/G
2. Notional learning hours Credits	120 (12)	172 (12)	255 (30)	98 (8)	497 (30)	240 (24)	260 (24)	110 (18)	857 (64)	485 (60)
3. Enrolment	16 139	1 110	1 400	2 407	54	50	60	17	607	135
4. Contact support	minimal – reaches <10% of students	minimal – reaches <10% of students	minimal[19] – reaches <10% of students	TV broadcasts reaching 20–40% of students	telephone, workshops ± 100% students	satellite lectures x 8h, telephone ± 100% students	monthly lectures (optional teleconferences) 30h/course ± 100% students	weekly contact (2h), field support ± 100% students	fortnightly workshops, workplace support ± 100% students	fortnightly workshops, workplace support ± 100% students
5. Assessment design	exam driven-optional assignment	exam driven-optional assignment	assignment, exam	assignment, exam	assignment, project, exam	assignment, exam (entry to dissertation)	tests, assignments, exams	exams, case studies, projects	assignments, exams	cumulative portfolios
6. Course design time: hrs/std hr	?	<1:1	40:1?	3:1	<1:1	10:1? 1,93:1	1:1	1:1	2:1	4:1
7. Materials	print	print	print	print	print	print limited video	print	print video	print audio video	print
8. Fees (R)	540	540	950	607	890	3 200	3 694	2 250	4 300	3 000
9. Cost per student (R)	n/a 181	1 769 658	1 027 719	781	6 529	13 932 5 033	2 600	9 350	4 372	4 599
10. Financial Status	n/a surplus	deficit deficit	deficit surplus	deficit	deficit	deficit deficit	surplus	deficit	breakeven	deficit
11. Cost per successful student (R) Success rate	n/a 432 42%	2 328 866 76%	1 533 1 073 67%	976 80%	10 703 61%	15 480 5 592 90%	3 250 80%	9 947 94%	5 143 85%	6 763 68%
12. If enrolment halves	n/a	3 041	1 405	794	12 162	25 592	3 313	16 575	4 991	7 420
13. If enrolment doubles		1 740	910	778	6 280	8 140	2 295	8 576	3 653	3 882

19 This course was costed on the assumption that a minimum of one two-hour contact session occurs each year. However, in 2003 no contact sessions were held.

While it was difficult in some cases to get entirely reliable information, we believe that the following preliminary conclusions can be drawn from Table 8:

- It would appear that correspondence-type courses with large enrolments, limited learner support and limited recurring investment in course and materials design (case studies 1, 2, 3 and 4) should be able to cover operational costs from charging reasonable student fees, and some are able to make a substantial profit.
- It would seem that postgraduate courses (case study 5) are probably rightly funded on a parity basis with face-to-face institutions.
- Distance education courses with fewer than 100 learners (case studies 5, 6, 7, 8) are probably too small to benefit from distance education economies of scale even if their student numbers are doubled.
- Some nominally traditional contact-based courses (case study 7) may offer less direct face-to-face support (as a percentage of notional learning time) than nominally distance education courses (such as case studies 9 and 10).
- Distance education courses offering regular face-to-face contact can probably be operationally sustainable on reasonable fees when enrolments reach about 500 learners (Compare case studies 9 and 10 which have similar models of delivery.)

Reading the table from left to right, we are not surprised to see that, in courses with limited individualised learner support, costs per student are not very sensitive to small changes in student numbers once we reach about 1 000 learners, because by this time economies of scale have already been reached with the print materials. However, programmes with very large numbers, 10 000+, do enjoy considerably increased economies of scale. In the middle of the table, we see courses with relatively low student numbers. Here, even when we double student numbers, enrolment is still too low to achieve significant economies in terms of course and materials design processes. At the extreme right of the table, we see the way in which increased student support of a face-to-face contact nature, which is variable with student numbers, limits the impact of economies of scale from course and materials design processes. However, it would seem possible that with enrolment at around 500 to 600 learners even courses which offer significant contact-based learner support begin to see costs per student declining to the level where they might reasonably be expected to be covered by student fees.

It would appear that distance education courses with 1000+ learners do not enjoy significantly greater economies of scale with small enrolment increases, but are sensitive to declines in enrolment to below 1000 (case studies 2 and 3). However, considerable economies of scale are achieved with very large numbers (case study 1).

COMPARING THE DATA WITH ILLUSTRATIVE EXAMPLES

In an effort to establish some basis for comparison with the above examples, we have created three hypothetical models of distance education provision, based on a common set of financial assumptions. Thus, in this section, three case studies are presented, ranging from a standard correspondence model to a contact-supported multi-media course design.

The following default costs have been used for each case study:

- Staff time:
  - Administrator R50/hour
  - External examiner R150/hour
  - Invigilator R80/hour
  - Lecturer R100/hour
  - Tutor R165/hour (involved in both workshops and marking)

- Other standard costs:
  - Overheads 30% to cover plant, equipment and support services
  - Printing R 0.26/page

Hypothetical case study one

This case study relates to an undergraduate course of 120 notional learning hours which caters for 750 learners over a nominal 40-week period. It is one of five modules that make up a year-long programme. Students register in the period December to February and write examinations in October/November.

Educational strategies include:

- Independent study of about 1.5 hours per week; and
- Individual telephonic consultation amounting to about 24 minutes per student per course.

Assessment comprises two assignments (accounting for 50% of summative assessment) and one three-hour exam paper (accounting for 50% of summative assessment), which is invigilated and subject to both internal and external moderation.

Materials are print-based and comprise 180 printed pages of materials (a module and three tutorial letters). Course design time has been estimated at five hours per notional learning hour, with the curriculum subject to complete review over a 5-year design period. The course pays a lump sum each year for the DTP of its study materials: in 2003 this amounts to R20 000. Support services are available on-line and by e-mail through the institution's general learner support services, but are not the primary means of learning and teaching for this particular course and are used rarely.

The throughput rate for the course is estimated at 50%.

Table 9: Hypothetical case study one – Correspondence

Lecturing staff (workshops and individual consultations)	R30 000
Assessment (lecturers/moderator/invigilators)	R131 235
Course design	R12 000
Administration	R23 600
Materials, telephone, travel	R55 100
Overheads @ 30%	R75 581
Total cost	**R327 516**
Cost per student	**R437**
Cost per successful student @ 50%	**R874**
Fee income per student	**R540**
Surplus/deficit	**R77 485**
If student numbers halve: Cost per student	R581
If student numbers double: Cost per student	R404

As the summary indicates, the course will generate a surplus from student fees alone on a registration of 750 students. However, if enrolment were to halve, the course would then run at a loss compared to student fees.

Hypothetical case study two

This case study relates to a different way of offering the same undergraduate course as in case study 1. Again, the course is weighted at 120 notional learning hours and caters for 750 learners over a nominal 40-week period. It is one of 5 modules that make up a year-long programme. Students register in the period December to February and write examinations in October/November.

Educational strategies include:

- Twenty hours of contact time: five Saturday mornings at four hours a time (at venues – for example, school classrooms – costing R150 per session to hire);
- Independent study of about one hour per week (reduced because of the contact time added into the course delivery); and
- Individual telephonic consultation amounting to about 15 hours of lecturer time per course (considerably reduced from case study one because students are now more likely to raise questions with their contact tutors).

Assessment comprises two assignments (accounting for 50% of summative assessment) and one three-hour exam paper (accounting for 50% of summative assessment) which is invigilated and subject to both internal and external moderation.

Materials are print-based and comprise 180 printed pages of materials for students (a module and three tutorial letters) and a 30-page guide to contact sessions for tutors. Course design time has been estimated at six hours per notional learning hour (allowing additional time for designing of tutor guides), with the curriculum subject to complete review over a five-year design period.

The course pays a lump sum each year for the DTP of its study materials: in 2003 this amounts to R20 000. Support services are available online and by e-mail through the institution's general learner support services, but are not the primary means of learning and teaching for this particular course and are used rarely.

The administrator spends less time fielding telephone enquiries from students than in case study one, but allowance has been made for 100 hours spent on coordinating the tutors.

The throughput rate for the course in this format is estimated at 65%.

Table 10: Hypothetical case study two – Correspondence plus contact support

Lecturing staff (workshops and individual consultations)	R84 000
Assessment (lecturers/moderator/invigilators)	R131 235
Course design	R14 400
Administration	R22 300
Materials, telephone, travel	R74 045
Overheads @ 30%	R97 794
Total cost	**R423 774**
Cost per student	**R568**
Cost per successful student @ 65%	**R874**
Fee income per student	**R540**
Surplus/deficit	**(R18 774)**
If student numbers halve: Cost per student	R780
If student numbers double: Cost per student	R529

As the summary indicates, we now estimate that the course will run at a small deficit against student fees on a registration of 750 students. The change from a surplus of R77 485 to a deficit of R18 774 amounts to an overall increase in costs of R96 259 but for this added cost

we would expect to see an additional 112 students successfully graduate from the course. In addition, we would expect the quality of passes to improve generally, on the understanding that the target learners entering the course are unlikely to be well-prepared for independent study. Any reduction in student numbers will see the deficit increasing. Conversely, if student numbers could be increased to R1 500, the course could benefit from economies of scale and again generate a small surplus (of R16 428).

Hypothetical case study three

This case study relates to an undergraduate course of 120 notional learning hours which caters for 750 learners over a nominal 40-week period. It is one of 5 modules that make up a year-long programme. Students register in the period December to February and write examinations in October/November.

Educational strategies include:

- Independent study of about one hour per week;
- Individual telephonic consultation of about 30 hours of lecturer time per course;
- Twenty hours of contact sessions held on five Saturdays for four hours per session;
- A two-hour televised lecture offered twice per course in which the lecturer gives general feedback on assignments using existing satellite broadcast facilities.

Assessment comprises two assignments (accounting for 50% of summative assessment) and one three-hour exam paper (accounting for 50% of summative assessment) which is invigilated and subject to both internal and external moderation.

Materials are multimedia, and comprise 180 printed pages of materials (a module and three tutorial letters), a textbook, and a video demonstrating certain practical elements of the course (design outsourced at R80, 000 in 2003). Course design time has been estimated at twenty hours per notional learning hour, with the curriculum subject to complete review over a five-year design period. The course design team includes the responsible lecturer (30% of design time), an instructional designer (30% of design time at R250 per hour) and external writers (60% of design time at R100 per hour). Support services are available online and by e-mail through the institution's general learner support services, but are not the primary means of learning and teaching for this particular course and are used rarely.

Each study group is visited once during the course of the year at an average cost of R3 000 per visit.

The throughput rate for the course is estimated at 80%.

Table 11: Hypothetical case study three – Multimedia using a design team

Lecturing staff (workshops and individual consultations)	R86 300
Assessment (lecturers/moderator/invigilators)	R130 575
Course design	R69 600
Administration	R31 450
Materials, telephone, travel	R420 150
Overheads @ 30%	R221 423
Total cost	**R959 498**
Cost per student	**R1 279**
Cost per successful student @ 80%	**R1 599**
Fee income per student	**R540**
Surplus/deficit	**(R554 498)**
If student numbers halve: Cost per student	R1 740
If student numbers double: Cost per student	R1 132

In this model we have seen additional contact support offered in the form of televised lectures using an existing network and visits from representatives of the central institution. We have also seen the study material augmented by a textbook and a specially commissioned video. These additional features have pushed up the course costs considerably. The case study raises useful questions such as the following:

- What is the added value of additional features in the course with respect to improved quality of learning and increased throughput?
- What is the optimal investment in the course to ensure optimal quality of learning and learner throughput?
- What media are best used for what purposes?
- To what extent can investment in the quality of a course be covered by course fees from the target audience and at what level must additional funding be sought?

Some models for funding distance education

What then does the above information suggest about how distance education programmes should be funded in South African higher education? Before presenting further ideas on this, we believe that it is worth briefly reviewing current positions adopted by different parties on the issue of funding formulae.

The Ministry of Education's position

It seems simplest to begin an exploration of possible models for funding distance education by reviewing the Ministry of Education's current position on the matter. This is therefore presented in full below.

Contact and distance funds

In the 2001 discussion document, the Ministry reported that separate empirical cost studies commissioned by it and by the SAUVCA/CTP Finance Committees had shown that major differences exist between contact and distance teaching costs. On the basis of these studies, the Ministry concluded that teaching input funds for contact and distance students should not be equalised. Input teaching funds for FTE distance students should be less than those for FTE contact students.

The proposal in the discussion document was that funding grid prices for FTE distance students should be set at 50% of those for FTE contact students. The discussion document stressed however that funds for teaching outputs, as well as for research outputs, would not be reduced in the case of distance education programmes.

Several responses argued that advances in educational technology have made it impossible to make as sharp a distinction between 'contact students' and 'distance students' as that assumed by the discussion document. Because there are now many different instructional modes in higher education, each with its own cost structure, a government funding framework should make provision for more than just a contact mode funded at 100% and a distance mode funded at 50% of the contact mode.

The Ministry accepts that input teaching costs in at least some distance education programmes may be as high as those in traditional on-campus programmes where students interact on a full-time basis with teaching staff. The Ministry does not however accept that this is the case with the majority of 'distance education' programmes in the South African context. For example, in 2000 121 000 FTE students (or 30% of the overall total) were placed by their institutions in the category "distance student". The majority of these distance students (87 000 or 72%) were registered with the two dedicated distance education institutions. Many of the remaining 34 000 were registered for what the Ministry believes are low quality programmes offered by public universities and technikons in partnership with private providers. The evidence which the Ministry has suggests that the public institutions involved in these private partnerships are generating substantial amounts of subsidy and fee income at extremely low levels of cost input.

The Ministry has set in motion processes to resolve its concerns about the current status and quality of distance education programmes. These processes include the proposed establishment of a single dedicated distance education institution, and the placing of

limitations on distance enrolments at other institutions, until a review to be undertaken by the Council on Higher Education has been concluded. When these processes have been concluded, the Ministry will undertake further empirical studies of the input costs of distance education programmes in South Africa, and may, if the evidence supports this, change the teaching input weighting of 0.5 between FTE distance and FTE contact students. Any changes to the current input weighting of FTE distance students will be phased in over a number of years.

The Ministry has decided, against this background, that the proposals contained in the 2001 discussion document must stand, namely:

The funding grid prices for FTE distance students will be set at 50% of those for FTE contact students. The funding grid prices for FTE distance masters and doctoral students will be the same as those for contact students.

Funds for the teaching outputs of distance education programmes will be the same as those for contact education programmes. (MoE, 2003)

SAUVCA response to the department

SAUVCA has issued various responses to the above proposal. The first response reads as follows:

As was indicated in the introduction, a clear definition of the difference between contact and distance teaching has still not been formulated. The VALPAC documents of the HEMIS information system define three types of course delivery modes, namely contact, distance and mixed mode. These definitions raise more questions than answers to this complex problem.

Furthermore on the postgraduate level any distinction between contact and distance teaching is not only problematic, but also probably not educationally sound. In addition, it should be noted that the international trend is to place less emphasis on distinctions with regard to mode of delivery.

While it is acknowledged that the empirical cost studies on distance teaching referred to in the Ministry's document were valid and a true reflection historically, it is a matter of great concern that the pricing will be determined by the historical cost of four/five years ago. The present subsidy formula is based on the concept of correspondence education. Internationally, the standard and expected norm for distance education is to move away from correspondence education to modern distance education. Modern distance education includes at least two important additional elements, namely the team approach to course design and development of learning materials and the provision of learner support. With the team approach to course design and development, experts in different fields work

together to design and develop learner-friendly quality multi-media learning materials. The provision of learner support includes at least: enriching the learning experience through the use of tutors and counsellors; establishing distributed learner centres where learners can do individual study in appropriate surroundings and interact with tutors and other learners; and the use of technological media for additional communication between lecturer and learner.

The dedicated distance education institutions have followed the suggestions in the White Paper and are transforming from correspondence mode to modern distance education. This is having significant financial implications. It is not possible to implement fully the transformation to modern distance education with the team approach to course design and development and additional learner support, if distance education is still financed on the same level as correspondence education. The real changes in the actual cost started from 1997 onwards and are still increasing. A cost analysis of modern distance education was prepared and delivered to the Ministry of Education. A copy of this document is available on request. The study indicated that, even though the distinction in funding between different delivery modes has disappeared abroad, in South Africa at present a realistic relative funding ratio between distance education and contact education should be 75%.

It is important that the team approach to course design and the additional learner support should be funded at appropriate levels. As 'open' institutions, distance education universities and technikons historically have had to deal with greater differences in the level of preparedness of their students than institutions that have been able to apply selection. This is an important aspect of providing access to the higher education system for previously disadvantaged learners. However, it makes it even more important to provide adequate distance education learner support. It is therefore strongly recommend that the proposal to fund FTE distance students at 50% of the funding for FTE contact students in respect of teaching input subsidies should be reconsidered because it is still based on the outdated concept of correspondence education.

By utilising the relative contribution of the different components in the proposed formula and taking into account that only the teaching input subsidy component is subjected to the funding ratio for distance education, it can be calculated that the correct funding ratio (subject to current South African financial constraints) that needs to be applied in respect of teaching input subsidy in order to render an overall ratio of 75% between distance and contact education, is 65%. This minimum should apply to all programmes that comply with modern course design and student support criteria.

Recommendation 3: *The funding of distance students by means of the teaching input subsidy as proposed by the Ministry's document should be revisited by the TTT. The following matters should receive attention:*

- *A clear definition of distance teaching which takes the newest developments in this field into account*

- *An investigation into the rationale of differentiating between contact and distance teaching on the postgraduate/post-diplomat level*
- *The increase of the distance funding ratio in the teaching input subsidy in the proposed formula from 50% to 65%*

This has been followed by a second note to the following effect:

4.1 Contact and distance funds (Paragraph 3.3 of the Document)

SAUVCA and CTP would like to reiterate their concerns with the Ministry's approach to distance education. These relate to funding, but also to the position of distance education in contact institutions. SAUVCA and CTP strongly believe that the present rigid distinction attempted by the Ministry between contact and distance education does not take into account the significant changes that have occurred worldwide in higher education in the development of new modes of educational delivery. Delivery of learning which capitalises on the opportunities offered in the developments of ICT has clearly shown that such rigid distinctions are not only outmoded but cannot be maintained as a variety of nuances of mixed delivery modes emerge in higher education. These modes of delivery place the focus on learning instead of teaching, offer flexibility in respect of time and place dimensions of learning, and fully exploit the leverage offered by modern technology to improve learning.

SAUVCA and CTP also believe that, within the bounds of the availability of funds, policy should determine funding approaches and not the other way round. A policy which advocates a rigid separation of contact and distance education as if these are the only two modes of educational delivery is not acceptable to SAUVCA and CTP. Equally unacceptable is a funding approach which has such a rigid position as a policy reality. SAUVCA and CTP accept that at present it may be necessary to start off with a funding approach premised on a 50% funding level for distance education as compared to contact education but cannot accept that this position can be maintained indefinitely since it would represent a position totally out of line with developments in the delivery learning. A more nuanced approach than that which is based on a crude two category approach only, will be necessary. This may even mean that in some institutions programmes could be funded at more than two funding levels.

4.1.2 Against the background of the said worldwide trends, both SAUVCA and CTP have noted with concern the apparent intentions to place limitations on distance enrolments at so-called contact institutions. Such developments are not in the interest of higher education in South Africa seen within a local as well as global context, and will not prepare our institutions to meet the future demands of higher education, life-long learning and the massification of education in particular. SAUVCA and CTP intend approaching the Ministry with their perspectives on this matter which affects the very nature of our educational system.

> 4.1.3 Finally, SAUVCA and CTP share the concern expressed by the Ministry about the low quality programmes offered by some universities and technikons in partnership with private providers. Such abuse of public funds should be dealt with strongly by the Ministry, possibly through reduced subsidies, and by the HEQC as a quality issue. However, SAUVCA and CTP are even more concerned that the document of the Ministry does not give any credit or encouragement for the innovative and pioneering work undertaken at considerable cost by many other higher education institutions to introduce more advanced educational models than those recognised by Government at present to position South Africa for the future. (SAUVCA, 2003)

Interestingly a distance education sub-committee of SAUVCA, which has been presented in a meeting to the Minister of Education but not yet formally submitted, has built on the concerns outlined below to articulate a possible additional model for funding distance education. It has proposed that, given shifts in delivery of distance education and the growing impossibility of differentiating two distinct 'modes' of education, FTE distance education students be funded at the same level as FTE contact students. It recognises that introducing such a change would have major financial repercussions, most notably by gradually increasing the extent of subsidy received by distance education programmes and reducing that of contact programmes. It has proposed that this model be phased in over a period of three to ten years.

Extracting the key issues

The detailed excerpts above reveal certain key policy issues. It is critical to examine these systematically in order to assess which will affect or be affected by decisions on funding formulae.

1. *The distinction between distance and contact education remains contentious.*
   As the discussions above reflect, a key problem with a two-tier funding formula such as that proposed by the Ministry of Education is that it begs the question of what constitutes distance education. Various definitions have been released, but these will always be contested at the margins. While there is a financial incentive for being defined as contact education, it is implausible to suspect that people will not seek to find loopholes in definitions that enable them to exploit this funding differential. There is already evidence of many programmes (particularly smaller-scale programmes) which might be defined as distance education not labelling themselves as this because of the reduced funding it will entail. Only the proposal contained in the SAUVCA Occasional Paper, *Learning Delivery Models in Higher Education in South Africa* (2003) and presented above would do away with this concern, as the distinction would be rendered meaningless.

2. *There is no debate regarding funding teaching outputs.*
   The Ministry of Education's position is quite clear in noting that teaching outputs of distance education and contact programmes will receive equal funding. This is an implicit

acknowledgement that – provided outputs are comparable – the price one should be willing to pay for different strategies for achieving the same outputs should be constant. There is some debate within this area, which, while not specific to distance education, has particular relevance to distance education programmes. This concerns whether teaching output subsidies should be based only on subsidies for students successfully completing programmes or whether subsidy should also be received for credits awarded towards completion of programmes (even where students do not then go on to complete the programme in its entirety). Distance education institutions are particularly concerned about current proposals only to provide teaching outputs subsidies on the basis of completed programmes, as they argue that many distance education students enrol in programmes to complete only a few courses for personal enrichment. In the experience of distance education institutions, many such students have no intention of ever completing the entire programme, and there is a feeling that current teaching output subsidy proposals will neglect this important aspect of distance education delivery.

3. *There is no debate regarding postgraduate programmes.*
   The extracts above also indicate clearly that there is no dispute at the level of postgraduate funding, as FTE students will be funded to the same level regardless of mode of delivery. This is anecdotally supported by the empirical research that we have done. This is, however, not supported by a more recent document from the Ministry of Education, *Government Allocations to Public Universities and Technikons*, (MoE, 2003: 7), which proposes that postgraduate programmes offered via distance education receive smaller input subsidies than those offered face-to-face. At this level, where programme enrolments are clearly going to be smaller than at an undergraduate level, we think this is problematic, as it will potentially prevent many working students – a clear and important group of potential postgraduate enrolments for distance education programmes – from participating in postgraduate education. Consequently, we believe that it is important to ensure that input subsidies at the postgraduate level are the same for all modes of delivery. Thus, our proposals below focus primarily on undergraduate education, on an assumption that subsidies should be equalised at the postgraduate level.

4. *The Ministry of Education remains rightly concerned about receiving specific, high quality services for money it spends in higher education.*
   The above extracts reveal a clear concern on the part of the Ministry of Education that its funding formulae should not be exploited by unscrupulous elements within the system to create distance education 'cash cows'. Regretfully, distance education in South African higher education has included a few large-scale, poor quality programmes that would easily be able to turn healthy profits on even a 50% FTE subsidy; a profit often exacerbated in the current environment by having inactive students in distance education programmes (i.e. students still enrolled but not actually making specific progress on their programme of study within a calendar year) continuing to qualify for government subsidy. These programmes absorb large percentages of government expenditure on higher education without delivering meaningful instructional services. Thus, any

recommendations regarding funding formulae that do not take account of this history will correctly not be taken seriously.

5. *Systemic complexity is a growing policy problem.*
   Even the few extracts above illustrate clearly that South Africa is already faced with a highly complex policy environment in higher education. It is therefore critical to examine the extent to which any new proposals add to or reduce that complexity. As a matter of principle, we think it is useful to strive to reduce complexity, not to increase it. The more complex a system becomes, the harder it is to maintain and police, and the greater the likelihood that people will seek to find ways to exploit that complexity for personal or institutional gain.

Reviewing the options

Two specific proposals require consideration before proposing a way forward for funding higher education.

Equalising subsidies

First is the proposal that distance education and face-to-face education be funded at 100% of the available subsidy. However, this proposal remains problematic for various reasons:

1. International and local research clearly suggests that distance education programmes – well-planned and taken to scale – can deliver high quality education at lower per-student costs than face-to-face education. This is also a central tenet in many rationales presented locally for moving to distance education delivery. Thus, a key policy incentive for the implementation of distance education programmes is to be able to reach more students with available budgets, and this incentive would be removed if subsidies were equalised across all modes of delivery.

2. South Africa has a long and well-documented history of poor, large-scale delivery of distance education programmes. Given this history, it seems unreasonable to expect government to take the 'leap of faith' that greater investments in distance education will lead to better quality, as is currently argued by many providers. Indeed, these arguments are also undermined by a cross-cutting argument that the need to increase subsidies is actually to sustain small, expensive distance education programmes through cross-subsidy, not to improve quality within big programmes. Given this confusion, we believe it is important that clear plans to demonstrate this improvement in quality need to be provided before additional funding is granted.

3. Equalising the subsidy across distance and face-to-face education would have the effect of reducing the nett subsidy available for all education programmes. Given the above points, this is not likely to be productive, and there is not yet sufficient evidence that it

would improve the overall output of the system. Thus, we believe that distance education programmes should be required to demonstrate on a case-by-case basis the need for additional funding before it is granted.

Of course, many people will observe that many similar criticisms about quality and value for money could well be levelled at many face-to-face programmes. This again reinforces the need for additional research that compares the relative costs of distance and face-to-face courses and programmes, to ensure that balanced policy decisions can be reached that focus on simultaneously improving the quality of and access to higher education. What is clear even from our empirical research is that distance education programmes with reasonable enrolments as they are *currently* running (even those with reasonable learner support structures) do not necessarily require substantially more funding to cover their costs.

Raising the funding percentage

Various proposals have been put forward during the course of debates on funding formulae to argue the case for increased percentages of subsidy being granted to distance education programmes. This has been particularly the case since government proposed the new 50% funding formula for distance education. Proposals typically propose a range from 65% to 75% of total subsidy to be granted to distance education programmes.

Several of these arguments are based on a sound logic that running distance education effectively – and particularly providing meaningful learner support – is more expensive than running old-style correspondence education. There is ample evidence internationally that educationally effective distance education is a significantly more expensive exercise than correspondence education. Nevertheless, the proposal for a blanket increase in subsidies remains problematic for various reasons:

1. Simply increasing the subsidy provides no assurance that quality of delivery will improve. While improvements in quality of delivery are clearly required, these should be preceded by careful planning to ensure that additional funding will indeed be used to improve quality. There is little evidence that any such planning has been done in a meaningful way across the system (although there are many programmes that have, of course, done exactly this), so a systemic increase seems unjustified under current circumstances.

2. Given the financial analyses above, together with further research done in the sector, it is apparent that large-scale distance education programmes are being used to cross-subsidise small, inherently unsustainable programmes. This raises the question of what the role of distance education should be within the higher education system; a debate that has been introduced in the first section of this document. A key reason for introducing distance education internationally has been to expand access to higher education delivery in key areas, rather than to provide a comprehensive suite of programmes across all learning disciplines. Even if the goal is the latter, we believe it is untenable to continue

to fund small-scale distance education programmes through extensive cross-subsidisation. If small-scale distance education programmes in niche areas are considered a priority, then strategies need to be developed to support those programmes in their own right by costing them carefully. Thus, they should not be made sustainable by taking money away from large-scale programmes, as this undermines the ability of those programmes to deliver the kind of quality of distance education that institutions claim is more expensive to run than traditional correspondence education. Simply raising the subsidy percentage for distance education programmes is likely only to perpetuate an inherently inefficient financial situation, rather than requiring institutions to reflect critically on what their priorities are where rationalisation needs to take place.

In summary, we agree that there is merit in the argument that running distance education educationally effectively is a more expensive exercise, and that programmes implementing thorough course design and development processes, as well as extensive learner support, may well require more than the 50% subsidy currently proposed. However, we believe that it is critical that such programmes first demonstrate in their plans exactly how they propose to achieve these goals, before they are granted additional funding. Applying a blanket increase is likely simply to perpetuate inefficient financial practices, without providing any guarantees of improved quality of delivery.

Extracting a possible way forward

Drawing from the above and from empirical research conducted by SAIDE during 2003, we believe that the following model is worth considering:

1. Distance education programmes at the undergraduate and honours levels should receive 50% of the FTE input subsidy of contact programmes, as is currently proposed in the Ministry of Education funding framework. However:
   a) It should be confirmed that enrolments on upper postgraduate programmes offered at a distance should receive the same subsidy as face-to-face enrolments, regardless of the mode of delivery.
   b) All other courses at predominantly face-to face institutions with enrolments of fewer than, say, 50 full-time equivalent students per programme should receive full subsidies. There are three reasons for this.
      i) First, it is likely that conceptual slippage in terms of what is defined as 'distance education' tends to occur primarily among smaller programmes, and this additional policy point will remove the need for unnecessary and costly policing of the funding formula.
      ii) Second, empirical research suggests clearly that per-student costs of small distance education courses are actually at least as high as, if not higher than, the equivalent delivery of contact courses (because these courses require considerable investment in course materials design and development but are not able to exploit economies of scale).

iii) Third, as the scale of operations at this end of the spectrum is small, this will have limited impact on financial flows within the system.

c) Teaching output subsidies should be confirmed to be the same for all programmes, regardless of mode of delivery.

2. Any institution – including the dedicated distance education institution – should, through the Institutional Plan it is required to submit, be entitled to apply for a special increase in the subsidy it receives for a distance education programme (ranging from 51% to 100%). Any proposals received for this will need to be for programmes with an agreed minimum enrolment, proposed to be 300 to begin with. This figure could be adjusted by the Ministry depending on how it wishes to steer the system. (This notion is explored further below.) Institutions applying for increased subsidies will need to motivate why additional expenditure is required, and will also be expected to report on any funding received to demonstrate that it was spent on the programme for which it was provided.

3. Through the HEQC – as is proposed in the next section – targeted quality reviews of large-scale distance education programmes should be undertaken, with a view to rehabilitating poor quality programmes and then possibly de-accrediting them if quality remains unacceptably poor. Given the scale of investment made by the state in such programmes, it is worth considering earmarked funding to expand the capacity of the HEQC to perform this function. This final step is critical regardless of what decisions are finally taken about the funding formula, as the formula cannot be expected to operate by itself as a lever to improve the quality of distance education.

Rationale for the proposed approach

The above modification to the Ministry of Education's proposed funding framework has several merits.

First, it does not propose to use policy to achieve any equalisation in the funding of distance and contact education. Instead, it leaves this to the higher education institutions to decide. If sufficient motivation can be given by providers of distance education programmes as to why they require additional funding, and they can demonstrate that they are spending this on improving the quality of their programmes, then the system will drift naturally towards the proposed funding formula contained in the SAUVCA Occasional Paper, *Learning Delivery Models in Higher Education in South Africa* (2003). However, it is also clear from the empirical research presented above that most large-scale distance education programmes operating as they currently do are quite capable of covering their cost on a reduced subsidy. Thus, this approach puts the onus on providers to prove that they justify additional funding, rather than requiring the system to find ways to increase their funding across the spectrum.

Second, the ability to claim additional subsidy can be used by the Ministry of Education to signal specific policy preferences it may have. For example, it can indicate preferences

for the delivery of distance education programmes in key areas (say, pre-service teacher education or management training) and then use a funding lever to encourage institutions to develop programmes in these critical areas. It can also become possible to signal policy preferences with regard to the social function of distance education, for example laying emphasis on using high-quality distance education to bring higher education to rural learners. This is in alignment with the notion of using funding as one of the three steering mechanisms for higher education.

Third, the insertion of minimum numbers (before a programme is considered 'distance' and before it can qualify for funding) provides simple levers for government to set policy direction. Over time, the effect of shifting these numbers upwards or downwards can send clear messages about the direction in which the Ministry of Education wishes to see distance education develop. If, for example, the number of learners required in a programme before additional subsidy can be claimed is increased, this sends a clear message that the Ministry wishes to see distance education delivery used primarily to increase access to mainstream higher education programmes. If, however, it reduces this number, this will indicate a desire to use distance education also for specialised, niche programmes (possibly targeting employed learners already relatively highly skilled).

Fourth, the establishment of a cap below which programmes are not considered to be 'distance' will remove the inclination of many people to misrepresent what they are doing to qualify for higher subsidies. This will simplify system administration over time, and reduce the need for policing at the margins of the system.

Fifth, and most importantly, the above approach provides clear incentives to invest in improving the quality of distance education practices. Distance education reaches large numbers of higher education learners, and is a critical strategy for achieving re-distribution of skills and equity in South African higher education. However, there are no clear policy levers currently for improving quality of delivery. We believe the above system would focus spending on those committed to improving quality, to the benefit of the country as a whole.

Requirements for success

To work successfully, the above approach would require the following:

- An earmarked fund for additional subsidy grants would need to be established over a period of three years. Mechanisms to build up such a fund and administer it would need to be identified. The Ministry of Education document, *Government Allocations to Public Universities and Technikons* (MoE, 2003) proposed the establishment of a teaching development grant, which we believe could be used as a vehicle to disburse this additional funding for deserving distance education programmes. Unfortunately, though, this document only envisages the establishment of this vehicle by 2006/2007, which would

be too late to allow meaningful growth of high quality distance education provision in the short to medium term. Given the numbers of students enrolled in distance education programmes, we believe that it is important to introduce funding levers to encourage investment in quality distance education sooner than this, and would therefore propose that an interim Teaching Development Grant be established to create space for earlier implementation of the above recommendations.

- Definitions differentiating between distance and contact education would still be required for programmes with enrolments of more than 50 and would need to be policed to ensure that misrepresentation of delivery modes is not taking place. Where such misrepresentation is occurring, it will be necessary to have effective legal mechanisms to deal with what might effectively constitute fraud. It is important to note, though, that these definitions and policing mechanisms will be required in most variants of the funding formula model. While there is evidence of a blurring of the distinction between face-to-face and distance education, we are of the view that there is still a huge provision of correspondence and clearly distance education programmes (including certain web-based programmes), many of which – when run efficiently and taking account of economies of scale – should not automatically be granted full input subsidies. As with all rules of definition, there will be differences of interpretation at the margins of delivery, and special care will need to be taken not to discriminate unfairly against programmes based on mixed modes of delivery. However, we believe that, with time and effective follow-up on implementation of the proposals, a 'case history' can reasonably quickly be compiled to assist with the interpretation of definitions at the margins. As a starting point, we believe that a somewhat 'reductionist' definition might in fact serve the purpose best, as it will focus attention on the key principles of separation between educator and learner and the scale of educational delivery. Thus, we believe an initial definition of distance education might comprise the following elements:
  - Education where delivery at a distance (spatially and/or temporally) is the predominant means of teaching and learning – not face-to-face.
  - The above can be qualified to refer to education where the educator and student are in the same location for less than a certain percentage of the time. Initially, distance education might thus be referred to as education where more than 70% of student learning time is for independent study.
  - To be identified as distance education at a predominantly face-to-face institution, a course must have an enrolment of more than 50 students.

- The HEQC will need to be provided with support to review large-scale distance education programmes as soon as possible. This will need to include additional funding to enable it to expand its operation.

- The above scenario does not take account of the problem – already expressed by distance education institutions – that there is a relatively high percentage of distance education students enrolled in courses who do not ever intend to complete entire programmes of study but instead choose to take individual courses for personal enrichment. A funding

mechanism is required that provides some form of subsidy to institutions enrolling such students (whether in face-to-face or distance education programmes), provided some evidence can be offered upfront that such students do indeed not intend to complete programmes of study.

Possibly most importantly, the proposals above are based on the premise that it is not the business of dedicated distance education institutions to deliver a comprehensive programme offering across a full spectrum of academic disciplines and programmatic areas. From a financial perspective, our research suggests that keeping small-scale distance education programmes operational through cross-subsidisation from large-scale programmes is inappropriate, as it takes away from the large programmes money that is urgently required for improving the quality of delivery for large numbers of students. Our view is that the priority for distance education institutions is to focus their resources on delivering fewer high-quality programmes to larger numbers of students, in order to meet the most critical educational needs of our country. Of course, there will always be exceptions where small programmes offered at a distance are of critical importance, but the mechanisms proposed above provide strategies to direct funding to these exceptions on a case-by-case basis. This represents an important policy position on the part of the Ministry of Education, and requires careful deliberation before it is implemented.

STRATEGIES FOR ASSURING THE QUALITY OF DISTANCE EDUCATION PROVISION

INTRODUCTION

In research conducted by the CHE Task Team, participants agreed that while the use of distance education methods can improve the quality of educational provision, the quality of much distance education on offer is a cause for concern.

The international review and assessment of distance education facilitated by SAIDE in 1995 expressed this concern clearly:

> Taken as a whole, distance education's contribution to the priorities for education and training in the *Policy Framework* is variously marginal, inefficient and, in respect of the values sought for democratic South Africa, dysfunctional. (SAIDE, 1995: xxii)

In 1994, there was only one legal mechanism to regulate distance provision. The Correspondence Colleges Act (section 2 of Act No 59 of 1965) made provision for the establishment of a Correspondence College Council and was intended to maintain the integrity of private correspondence tuition. All private Correspondence Colleges had to register with the Council and adhere to its conditions. These were not very detailed and were directed mainly at controlling dishonest marketing and irregular certification.[20] Moreover, this Act was not a mainstream regulation, and did not apply to the majority of distance education, which was provided by the dedicated distance education institutions.

While the review and assessment were under way, the National Commission on Higher Education was conducting policy research which culminated in the policy statements in the Green Paper on Higher Education and ultimately the White Paper 3 on the transformation of higher education. The Green Paper stated the commitment of the Department of Education, in conjunction with the Council on Higher Education, to:

> Assess the quality assurance processes and the capacity of distance institutions to provide quality programmes based on the principles of open learning. (MoE, 1996)

The concern during this period was with quality of provision by the dedicated distance education institutions.

In response to this concern, in 1996 the Centre for Educational Technology and Distance Education in the Department of Education initiated a process for developing a quality assurance framework for distance education provision. The Centre (then the Directorate: Distance Education, Media, and Technological Services) contracted a research team to assist with the development of a discussion document entitled *A Distance Education Quality Standards Framework for South Africa*. After extensive comment from members of the newly

20 However, there was one very interesting regulation – that correspondence colleges were not allowed to use less than 10% of their annual income from correspondence tuition on 'revision of lectures and correcting of texts'.

formed National Association of Distance Education Providers of South Africa (Nadeosa), a policy statement was prepared, *Criteria for Quality Distance Education in South Africa*: *A Policy Statement* (DoE, 1998). However, it was decided that, rather than declaring a separate policy for distance education, it would be better to use the comprehensive framework that had been developed for distance education to apply to all educational provision. The appropriate body to do this at the time was the South African Qualifications Authority (SAQA). Finally, in 2001, the distance education quality criteria were adapted for all education and training provision by SAQA in its document, *Criteria and Guidelines for Providers* (SAQA, 2001).

What effect have these documents had? The SAQA document has, unfortunately, hardly been referred to or used. There has been no call for providers to use it. It is an official document, but not a policy document, and very far from being a regulatory framework. The 1998 *Criteria* document has been more widely used by distance education providers in South Africa – it has even been adopted/adapted by other countries/organisations. (See the Asian Association of Open Universities, and Namibia as two examples.) However, the 1998 *Criteria* do not carry the force of regulation.

The 1998 *Criteria* were biased towards provision in dedicated distance education institutions. Since that time, however, the increasing use of distance education methods in South African higher education has been noted in a number of documents, most notably the *National Plan for Higher Education* (MoE, 2001). Much distance education provision now takes place outside the dedicated distance education institutions, and much is of poor quality. This has been particularly the case with partnerships between public and private providers. As is pointed out in the National Plan, this expansion has not

> addressed the emphasis in the White Paper that the transformation of distance education requires focusing on improving the quality of learner support services as well as cost-efficiency and effectiveness. (MoE, 2001: 61)

In response to this, and in an effort to curb unfettered expansion of distance education, in 2000 the Ministry imposed a moratorium on the introduction of new distance education programmes in contact institutions. In 2001, with the *National Plan*, the moratorium was lifted, but other regulatory mechanisms were introduced – funding and quality. The *National Plan* stated that approval of distance education programmes

> will depend on the fit between the programme and the institution's mission, including institutional capacity, whether it addresses regional and/or national needs, and whether it meets the quality assurance criteria of the Higher Education Quality Committee. (HEQC). (MoE, 2001: 62)

It is clear from this brief historical account that there are quality difficulties both in the programmes that are offered by dedicated distance education institutions and in those

offered in formerly face-to-face institutions. Public and private distance education, as well as public/private partnerships for the delivery of distance education, need to be quality assured. The body charged with responsibility not only for quality assurance of higher education generally, but distance education in higher education in particular, is the HEQC.

The HEQC needs strategies to do this. Criteria are important, but there also need to be ways of using these criteria, and ways to make them 'stick'. Furthermore, to deal with the range of issues and range of types of provision, a mix of strategies will be necessary.

This document sketches five key strategies that can be used to ensure the quality of distance education provision.

1. **Infuse distance education concerns into the HEQC criteria for institutional audit and programme accreditation.**
   This is important because, as pointed out elsewhere in the research done for the Distance Education Task Team, the distinction between distance and face-to-face provision is blurring, and those face-to-face programmes increasingly using distance methods need to be alert to distance education quality considerations, even though they might not define themselves as distance programmes. In addition, distance education is first and foremost 'education' and therefore should be evaluated in the same way as other forms of educational provision.

2. **Develop a comprehensive and up to date set of criteria for quality distance education which providers of distance education programmes can use to develop and evaluate their own quality.**
   This strategy may seem to contradict the first. However, while distance education is first and foremost 'education', it is also true that the organisation of systems, particularly for large-scale distance programmes, requires certain ways of thinking and planning that make a separate set of criteria necessary. It seemed reasonable to use the 1998 *Criteria for Quality Distance Education in South Africa* as a basis for this comprehensive set of criteria, because distance education providers have been using it for their own internal quality assurance purposes for a number of years.

3. **Develop and apply to existing distance education programmes (particularly large scale programmes) a set of minimum targets which programme accreditation and audit teams can use to focus their investigation of distance education providers and/or programmes**.
   The reason for minimum targets is not to describe acceptable practice, but to identify and control poor practice. If minimum targets are limited in number but well-defined, it should be possible to apply them rigorously, drilling down deep into the evidence and challenging providers to change their practice or face de-accreditation.

4. **Review large scale distance programmes of a particular type with a view to collaborative identification and application of programme specific minimum criteria.**
   The suggested programme areas are teacher education and economic and management sciences. In addition to being rigorous, a strategy also has to be manageable. Not all existing programmes can be investigated - even with a relatively limited set of minimum targets. It is necessary to select. As it is in large-scale programmes that there are the greatest temptations to cut corners on quality and maximise profit, it seems sensible to concentrate on such programmes in applying minimum targets. The collaborative element in this strategy is also important. Criteria/standards need to be contextualised and adapted – and this should be done in consultation with programme specialists. However, ultimately it should be a neutral body that insists that the agreed criteria are applied.

5. **Develop and apply criteria for provider readiness to offer programmes using distance education and electronic learning methods.**
   The CHE Task Team investigation into Distance Education shows that there has been an increase in the number of distance education programmes offered by predominantly face-to-face providers. There has been a huge increase in the use of electronic methods – for either predominantly face-to-face or distance delivery. Often these methods are introduced without proper preparation. There is therefore a need to bring to the attention of providers what needs to be put in place before distance education/electronic learning methods are used.

It has been suggested that there should be a sixth strategy. This would be **to work with student organisations to assist students to be discerning about services offered**, but work on this strategy is not reflected in this document.

STRATEGY NO. 1: INFUSION OF DISTANCE EDUCATION CONCERNS INTO HEQC CRITERIA

As preparation for commenting on the HEQC criteria with a view to infusing distance education concerns, SAIDE prepared a conceptual analysis of distance education (SAIDE, 2003). This document defined distance education, looked at the reasons for using distance education methods in South African higher education, and, flowing from the definition of distance education, described the kinds of practices that are characteristic in distance education provision.

This document argues that there are certain ways to distinguish distance education from other forms of educational provision. However, it does not follow that the characteristics of distance education will be markedly different from those of face-to-face education – the continuum of provision means that, when it comes to the characteristics of various forms of educational provision at the level of delivery, there is likely to be overlap. This is because distance education is first and foremost 'education' – and only secondly 'distance'. As a result, the criteria being developed by the HEQC will need to be applicable to *all*

educational provision, for including distance education. This means that it is important for distance education concerns to be integrated into the HEQC criteria.

The HEQC has two discussion documents containing higher education quality assurance strategy and criteria:

- Proposed Criteria for the HEQC's First Cycle of Audits: 2004-2009: Discussion Document, March 2003
- Proposed Criteria for the Programme Accreditation Cycle: 2004-2009: Discussion Document, September 2003 (not for circulation).

The approach in the case of both documents was to check the proposed criteria against the particular characteristics of distance education raised in the conceptual analysis, as well as in the 1998 *Criteria for Quality Distance Education in South Africa*. Additions and amendments to the existing criteria were proposed.

Comment on the audit criteria

For the suggested criteria for the pilot audits of the HEQC in 2003, the following was proposed:

Table 12: Institutional criteria for offering distance education

Criterion 1 **SUB-AREA: DISTANCE EDUCATION: Planning, development and review** **CRITERION:** The particular characteristics and needs of distance education are taken into account in the planning, development and review of such programmes. *In order to meet the criterion, the following are examples of what would be expected:* i) Programme planning and budgeting are aligned, with potential income clearly identified, and appropriate levels of resource set aside for course design and development, for administrative systems and for supporting learners. ii) The design of the programme ensures explicit and reasoned coherence between, on the one hand, the aims and intended learning outcomes, and, on the other, the strategies for teaching at a distance, the scope of the learning materials and the modes and criteria of assessment. iii) The design of the programme provides a learning opportunity which gives to students a fair and reasonable chance of achieving the exit level outcomes required for successful completion. iv) Existing programmes are monitored, reviewed and subject to re-approval regularly, in particular to ensure that the content of all learning materials remains current and relevant and that learning materials, teaching strategies and forms of assessment are enhanced in the light of findings from feedback.

Criterion 2

SUB-AREA: DISTANCE EDUCATION: Staffing

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

In order to meet the criterion, the following are examples of what would be expected:

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

Criterion 3

SUB-AREA: DISTANCE EDUCATION

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

In order to meet the criterion, the following are examples of what would be expected:

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

Criterion 4

SUB-AREA: DISTANCE EDUCATION

CRITERION: The policies and procedures for assessment take into account the particular contexts of distance education students.

In order to meet the criterion, the following are examples of what would be expected:

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

Comment on the programme accreditation criteria

The following suggested additions were taken up by the HEQC and included in the next version of Proposed Criteria for the Programme Accreditation Cycle:

Staffing

- Though junior staff or part-time tutors may act as facilitators of learning, the learning is designed by qualified and experienced academic staff.
- Junior staff and part-time staff and tutors are trained, where necessary, and monitored by full-time academic staff.
- Appropriate administrative procedures exist for the selection, appointment, induction and payment of part-time local tutors.
- Contractual arrangements relating to the time and work of academic staff ensure that all teaching, research, learning support, **materials development, assessment, monitoring of part-time staff (where applicable)**, counselling and administrative activities related to the proposed programme are realised.
- Staff and students are trained in the use of the technology required for the programme.

Programme administrative services

- There are effective systems in place for communication with students, including those in remote areas.
- Proper processes are in place for the identification of active students, particularly in distance education programmes.

Programme design

- Learning material for the proposed programme is developed and evaluated in terms of its underpinning teaching and learning philosophy, the required learning outcomes, and their appropriateness for the target learners. Materials encourage a critical and reflective approach.
- Academic staff are trained, where necessary, in the development of learning materials.
- There is proper acknowledgement of the source of all quotations and no breach of local or international copyright laws.

Venues

- In the case of remote students, special care is taken to place suitable sites of learning close to where students live/work.

Assessment

- Procedures are followed to receive, record, process, and turn around assignments within a time frame that allows students to benefit from formative feedback prior to the submission of further assessment tasks.

Programme review

- There are mechanisms to allow for the periodic revision of learning material in the light of ongoing feedback from learners and tutors and advances in knowledge and research.

Conclusions regarding differences in approach in audit and accreditation criteria

It is interesting that in the HEQC programme accreditation criteria the approach was to infuse distance education concerns into the general criteria, whereas in the HEQC institutional audit criteria the approach was to separate out distance education concerns into separate tables.

This difference in approach is justified, in that audit evaluations focus on institutional systems. Use of distance education methods demands the design and management of certain specific systems. In order to work effectively, these systems generally need to be institutionalised or at least based in a distance education unit within the institution. It is not effective to replicate institutional systems at the programme level. The four distance education criteria above, though they contain much that is relevant not only to distance education but also to face-to-face education, present a neat summary of the institutional requirements for distance education.

However, accreditation evaluations deal much more with concerns that are common to all educational provision – for example, programme goals, learning materials and assessment design are issues for all programmes, regardless of the mode of delivery.

Proposal

It is proposed that:

- Distance education concerns should be infused into the HEQC's Audit and Accreditation Criteria in two different ways:
  - In the Audit Criteria, retain criteria of particular relevance to distance education provision as a separate set of tables;
  - In the Accreditation Criteria, ensure that the phrasing of the criteria covers the concerns of distance education programmes adequately.

STRATEGY NO. 2: A COMPREHENSIVE AND UP-TO-DATE SET OF QUALITY CRITERIA FOR DISTANCE EDUCATION

While acknowledging the need for infusion into the HEQC's overall processes, it is also useful to have a separate set of criteria for distance education which could be used by providers as a guide to self-evaluation and a comprehensive description of distance education. It seemed best to base this work on the 1998 Criteria (DoE, 1998), both because they were already in use in the distance education community and because they were developed in consultation with the distance education community in South Africa.

The framework of the 1998 document was organised around 13 criteria representing the main institutional elements for distance education provision:

1. Policy and planning
2. Learners
3. Programme development
4. Course design
5. Course materials
6. Assessment
7. Learner support
8. Human resource strategy
9. Management and administration
10. Collaboration
11. Quality assurance
12. Information dissemination
13. Results

Under each of the headings there was an overall criterion, followed by numbered elements which teased out the implications of adherence to the broad criterion. As this style of organisation facilitated an appropriate systems view of distance provision, it was retained in the revision. However, a number of changes to the criteria were necessary in the light of changes in distance education in South Africa.

The most important of these is the recent increase in distance education provision by predominantly face-to-face institutions. Other changes in South African distance education reflected in the CHE Task Team's research are:

- Increased interest in exporting South African distance education programmes, particularly to the rest of Africa;
- An increase in the number of imported distance programmes;

- A concern about quality issues in distance education provision through partnerships between public higher education institutions and private providers;[21]
- Increased use of ICT in both face-to-face and distance programmes.

With regard to the last point, South African higher education providers by and large seem to exaggerate very naively the potential of ICT for transformation of teaching and learning and to be unaware of the importance of analysing the teaching, learning and administrative environment before selecting appropriate technology. The technology environment also necessitates much more collaboration than has been customary in South Africa up to this point – and collaboration between a wider range of organisations (international providers, private e-learning organisations, technology companies, materials developers, non-governmental organisations, and so on). This necessitates much greater emphasis on protocols for collaboration than in the first set of criteria. Finally, the staff development and staff time demands of development and delivery of online courses are only now being encountered.

There were also limitations in the 1998 document (DoE, 1998) that have become apparent from the distance education research and evaluation work in the intervening five years. For example, in the 1998 document there was too much emphasis on openness (of which poor quality providers took advantage) and too little on building opportunities for success when opening access. Secondly, through evaluations, it has become clear that, while many providers have improved their systems and quality management, some do not understand how to design courses in such a way that they teach, rather than merely expose students to material from which they might learn. Revisions to the criteria therefore sought to describe more clearly what good teaching means. A third key finding in several evaluations was around assessment – absence of formative assessment, too little demand made of students by the kinds of assessment tasks, and poor management of assessment. Finally, despite the findings of the 1995 *Review and Assessment and the National Teacher Audit,* there is still insufficient understanding in the country of the centrality of a learner-support system that is integrated into the design of programmes and courses.

Another consideration in revision of the 1998 document (DoE, 1998) was that, though it would not be organised in the same way as the HEQC criteria, it should be aligned with the emphases in the HEQC's documents. The 1998 criteria were therefore adjusted to reflect the following HEQC concerns:

- Emphasis on fitness of purpose, and a concern that higher education programmes be transformative, rather than merely on fitness *for* purpose;
- Improvement of access and equity;

21 The Department of Education was so concerned about these partnerships that the Minister declared a moratorium on new public/private partnerships which has only recently been lifted. The main difficulty is insufficient quality management by the public provider, with resultant poor service to the students. There have also been a number of instances of dishonest marketing.

- The necessity for integrating planning, budgeting, and quality assurance; and
- Improvement of management of information systems.

In addition, in the HEQC approach, the following dimensions of provision receive extensive attention and a number of criteria had to be added to cover them:

- Assessment
- Staff capacity
- Work-based learning

The 1998 *Criteria for Quality Distance Education in South Africa* (DoE, 1998) were revised along the lines suggested above. The revised document was then discussed at a workshop session of the Nadeosa annual conference on 28th August, 2003, and distributed for comment to all participants after the conference to enable comment from the organisations which the participants represent. This revised document integrates the comments made both during and after the conference and represents a comprehensive set of criteria for quality distance education agreed upon by the South African distance education community.

Proposal

It is proposed that Nadeosa be approached to publish the revised *Criteria for Quality Distance Education in South Africa* – 2003 (see Background Paper 4a) and that the document be used by distance education providers and programmes for self-evaluation and setting up internal quality assurance systems.

STRATEGY NO. 3: MINIMUM TARGETS FOR DISTANCE EDUCATION

While it is important to have a comprehensive set of criteria for good practice, this is insufficient if the intention is to ensure that the criteria are used rigorously. A reduced set of criteria selected according to concerns in distance education at a particular time is necessary. The reason for this is as follows. A good set of quality criteria is necessary to develop an understanding of what distance education is and how it should be implemented. However, often a comprehensive set of quality criteria/standards is overwhelming – the standards are too comprehensive (and may even be too high, given contextual constraints), and so there is a tendency to either ignore them or pay lip service to them. Because they are too all-embracing, bad practice which is remediable may well escape attention. It is therefore helpful to identify particular areas of bad practice in the current context and the criteria or standards that relate to them, and then develop specific minimum targets which should be attained by all programmes. The targets could change from year to year, or be adapted to match the contextual constraints of particular programmes.

The role of minimum targets designed to avoid identified examples of bad practice is to give precise indications of how to reduce bad practice in particular aspects of educational

provision, rather than to give a complete description of good practice. Such targets are usually predominantly quantitative rather than qualitative. The attainment of minimum targets will not by itself lead to good practice, which is by its very nature open-ended, innovative, and responsive. Hence the set of Minimum Targets developed (see Background Paper 4b) should be read together with the Nadeosa *Criteria for Quality Distance Education in South Africa*. This longer document provides a comprehensive set of criteria/standards for good practice in distance education.

The examples of bad practice contained in the *Minimum Targets* document are derived from the CHE Task Team's research, consultation with distance education stakeholders through Nadeosa, and SAIDE's experience in evaluating and supporting distance education programmes over ten years.

These minimum targets should be seen in relation to their corresponding standards for good practice in distance education. Hence, for each aspect of bad practice identified, a standard for good practice is presented, drawn from the document, *Criteria for Quality Distance Education in South Africa* – (2003). This is followed by a description of the problem that manifests in bad practice, so that there is some basis for setting the minimum target. Finally, in addition to the minimum target, there is a statement of the evidence that could be gathered to judge whether or not the target has been reached.

The examples of bad practice, description of the problem, and relevant criterion/standard and minimum target/s are organised into the categories below:

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

Taken together, these constitute the main systems in terms of which distance education provision is organised.

In implementing the minimum targets, particularly in applying minimum targets to programmes with a particular focus (such as teacher education or commerce), an appointed accreditation team may need to adjust the targets to make them appropriate for a particular programme type or focus more attention on some minimum targets than others. In addition, in subsequent rounds of accreditation, this team may choose to raise the level of the targets, or even introduce new areas of focus.

Minimum targets designed as described could be used in a variety of ways. The point, however, is that they need to be applied strongly. Comprehensive criteria provide a vision of what to strive to attain. With minimum targets, the quality assurance system is insisting on the bottom line. So providers could use minimum targets for their own guidance and advertisement of quality, but this is not a very strong option. Further, the HEQC could use minimum target in its reviews of existing programmes. (See Strategy Four below.) This is a stronger option, but would mean that only some programmes would be reached. The strongest option would be for the Ministry to require that all distance education programmes – whether in dedicated distance education institutions or in predominantly face-to-face institutions – meet the minimum targets, and institute checks to ensure that this is being done.

Proposal

It is proposed that:

- Providers of distance education programmes be encouraged to adopt the overall quality criteria and ensure that they meet the minimum targets;
- The HEQC use the minimum targets in the process of accrediting existing distance education programmes; and
- The Ministry require all distance education programmes, whether offered by dedicated distance education institutions or predominantly face-to-face providers, to satisfy a set of minimum targets, and that the HEQC undertake periodic spot checks to ensure that this is happening.

Strategy No. 4: Review of large-scale distance programmes

The *Criteria* (Background Paper 4a) and the *Minimum Targets* (Background Paper 4b) provide a good basis for any review of large-scale distance education programmes by the HEQC. The strategy that the HEQC adopted in 2003 was to review all the Master of Business Administration programmes. This entailed consultative development of criteria, followed by self-evaluation and accreditation visits from HEQC teams.

It is important that large-scale distance programmes be selected first for review, because they affect large numbers of students, and because it is with large-scale programmes that the temptation to compromise quality for the sake of profit is most acute.

The dilemma with minimum targets is that, to be effective, they need to be precise. However, as they get more precise, they become limited to particular contexts. Review of large-scale programmes with a particular curriculum focus provides an opportunity to explore this dilemma and resolve it for particular contexts.

It is also important that programme-specific expertise is harnessed in quality assurance, as criteria demand interpretation rather than merely adherence. Without intelligent interpretation,

the criteria will become meaningless or, worse, distorted. However, there comes a point at which a neutral body has to say what is or is not acceptable.

Proposal

It is proposed that the HEQC select large-scale existing distance programmes with a particular programme focus (such as teacher education), reach consensus on minimum targets through a collaborative process with relevant providers, and then apply the agreed minimum targets rigorously to all selected programmes.

STRATEGY NO 5: PROVIDER READINESS TO OFFER PROGRAMMES USING DISTANCE EDUCATION AND/OR ELECTRONIC LEARNING METHODS

Thus far, the strategies presented have related reviewing of existing programmes. With regard to new programmes, the CHE Task Team research has shown that there has been an increase in the number and scale of distance education programmes offered at predominantly face-to-face institutions, as well as a great increase in use of electronic learning methods. There is a concern that institutions are not preparing adequately for quality provision using these methods. The kinds of system-wide institutional changes and staff development required are not acknowledged, resulting in inefficiencies, strain, and poor conditions for quality improvement.

The four criteria in Table 12 above would need to be met before any new distance education programme is accredited. These are:

- The particular characteristics and needs of distance education are taken into account in the planning, development, and review of such programmes;
- The particular demands of distance education are taken into account in the staffing arrangements of programmes;
- The institution has the necessary systems and guidelines in place to implement programmes at a distance;
- The policies and procedures for assessment take into account the particular contexts of distance education students.

However, if a provider needs guidance in establishing the required systems, then a more detailed document is required. Providers using distance education or electronic learning methods will need more detailed criteria, as well as some explanation of the additional requirements for distance education. In addition, programme accreditation teams could use this document to provide the necessary background for applying the four criteria in the Audit Criteria document.

It is also important that such a document deal with quality concerns in respect of export and import of programmes, both of which are increasing in South Africa. The criteria for quality

distance provision should, of course, be applied equally to programmes being exported or imported, but there are additional considerations. Background Paper 4c contains this additional detail.

This document is based on *Criteria for Quality Distance Education in South Africa (2003)* – see Background Paper 4a. It is organised according to the 13 main criteria in that document. In each section, a selection is made from the elements under the first twelve criteria in the comprehensive Criteria document and a rationale is given for the importance of this element for judging provider readiness to use distance education/electronic learning methods. In each case, only the critical elements have been selected.

Proposals

It is proposed that:

- The HEQC apply the criteria in Table 12 above to judge institutional readiness to offer programmes using distance education/electronic learning methods;
- Nadeosa be approached to amend and publish *Provider readiness to offer programmes using distance education and/or electronic learning methods* as a companion document to *Criteria for Quality Distance Education in South Africa (2003)*;
- Providers use this document as guidance for the establishment of the required systems, and that HEQC accreditation teams use it as background for the interpretation and application of the distance education tables in the Audit criteria.

CONCLUSION

The criteria documents and the five strategies for use of the criteria will provide effective quality assurance for distance education in South Africa in that:

- The imperatives of quality control and continuous quality improvement are balanced:
  - If used for self-evaluation, the revised *Criteria* challenge providers with a comprehensive description of quality distance education and a goal for continuous quality improvement;
  - The *Minimum Targets* provide a basis for quality control by the HEQC, and minimisation of bad practice.
- Through regular updating of the set of minimum targets, context-specific national quality improvement priorities can be identified and resolved. The process of deriving minimum targets from current evaluations of poor practice in distance education provides a basis for this.
- A balance between stakeholder participation in the interpretation of the criteria and centralised rigorous application of the criteria is maintained. The strategy for the review of selected large scale distance programmes provides an opportunity for this.

- Currently under-regulated expansion (of import/export of distance education and the use of distance and electronic education) can be controlled on the basis of quality. The distance education tables in the HEQC's Audit Criteria can be used to verify that distance education providers have the necessary systems for effective provision. Simultaneously, the *Provider Readiness* criteria can provide a developmental tool to guide providers who wish to use distance education/electronic learning methods for the first time.
- In an environment in which there are insufficient resources for comprehensive quality assurance across the system, the programmes in which poor quality affects most students are targeted first. The strategy for the review of selected large-scale distance programmes provides an opportunity for this.

STRATEGIES FOR DEVELOPING QUALITY LEARNING RESOURCES

INTRODUCTION

This chapter examines strategies for harnessing and optimising best expertise in the development of learning resources in higher education. The overall aim is to *recommend mechanisms to harness the best expertise in the country to develop high quality learning resources for widespread use in the higher education sector.*

This component of the research was intended to be not a comprehensive study but a limited and focused survey of examples from international literature and selected case studies that reflect national and, in a few cases, regional practice. (See Source Document 1b for a collection of international narratives and South African case studies.) The examples selected provide evidence of a representative range of practices that reflect the methods and mechanisms currently in use for acquiring learning resources.

The results of this survey were then used to propose possible strategies for developing and sharing learning resources. The term *learning resources* is used here to mean *resources that are used in the learning and teaching process and that are specifically developed for self-study, for example self-instructional learning materials and manuals, course materials used in distance education courses and programmes, multi-media learning resources and online resources.*

RESEARCH METHODOLOGY

The purpose of the survey referred to above was to gain a better understanding of the issues involved in creating an environment that allows the best use of the investment required to produce and disseminate quality learning resources. The insights gained informed recommendations made at the end of this chapter. To achieve this overall goal, the following activities were undertaken.

- International examples of innovative methods used for procuring quality learning resources were selected and collated.
- South African case studies that reflect diverse techniques and methods used to acquire quality learning resources were identified and collated.
- An analysis of the international survey and the South African examples of collaboration was completed.
- A resource pack of relevant information was compiled by a representative group of academics for use during a two-day workshop.
- A two-day workshop was conducted with academics from various higher education institutions to reflect on international and local practice and to brainstorm possible strategies for use in South Africa. (See Appendix 2a for List of Participating Academics and Appendix 2b for the Workshop Programme.)
- Draft strategies were developed for further discussion and refinement.
- The selected strategy was broadly circulated for comment and then further refined.

The proposed strategy that emerged from the above process follows below.

CHANGING PRACTICES IN INSTITUTIONS

Many traditional face-to-face institutions are turning to distance education methods, including use of ICT, to meet the present demand for developing the kinds of competence that enable people to function in an open, democratic information society in which change and the ability to respond to change have become the norm:

> Universities and other providers are responding to these changing demands by increasing the flexibility of their provision, offering a greater range and variety of courses that can be studied in various modes and by a number of means, including part-time attendance and distance learning. (Ryan et al. 2000)

Such a shift implies greater reliance on quality learning resources. As a result, many face-to-face institutions that have started developing learning resources for use in their programmes. They have, however, found that this is not a simple process and that development of such resources requires much more than just editing and publishing teaching texts in attractive covers. The rather complex and time-consuming process involved in developing quality learning materials is, therefore, dealt with in some depth below.

WHAT IT TAKES TO DEVELOP QUALITY LEARNING RESOURCES

Experience in this field shows that there are no quick fixes and no cheap options. Without the necessary expertise, adequate financial resources, time, and supportive organisational systems, one cannot expect to produce a quality output. Some enthusiastic academics who have rushed into the learning resource development process without giving careful consideration to these factors have come to realise this to their detriment.

The materials development process includes significant input by a range of different people such as the course curriculum development teams, subject-matter expert(s), instructional designers, graphic artists, editors, developmental testing team, the layout designer, and the production team. For online courses there is the added technical input as well.

> Internationally, norms for materials development are between 10 and 100 hours for every hour of student learning. In South Africa, most course writers (often without any staff development) are expected to produce materials at a rate of below one hour for every hour of student learning. It is not possible to produce the quality required for so small an investment of time. (*Minimum Targets for Distance Education in South Africa*, 2003)

Equally, time needs to be budgeted for planning, writing, critical reading, proofreading, and production processes. In many instances, insufficient time is allocated for these functions. Lecturers are often expected to develop learning resources in addition to their lecturing and

research tasks. In most cases, they are also expected to carry out these specialised tasks without the necessary training and support.

A PROPOSED STRATEGY

As was noted in the policy review in Chapter One, national policy processes have accorded great importance to the development of high quality course materials. Towards this purpose, 'a national network of centres of innovation in course design and development' is advocated in the White Paper (DoE, 1997: 27). The strategies for developing and sharing learning resources outlined in this section are an attempt to develop further the notion of 'network of centres of innovation'.

High quality learning resources are critical for all education, but particularly for distance education, for the following reasons:

- If well designed, they provide learners with the necessary support that will enable them to succeed in their studies.
- If shared across institutions, they offer unparalleled opportunities for professional development of higher education staff.
- If developed collaboratively there are greater possibilities for curriculum innovation and building of capacity in curriculum and materials development, as those involved contribute different kinds of expertise from a range of perspectives.
- There is too little local learning material of any quality. For learning to be effective, it needs to be rooted in the local context as well as being internationally comparable.

However, as signalled earlier in this chapter, development of high quality learning resources is complex, time-consuming, and expensive, and needs an effective set of strategies. The case study research presented in Chapter Three points out that one reason for the shortage of high quality local material is that institutions budget too little time and money for the course materials design and development process. In addition, there is a need, particularly in the context of increasing development of online courses, for greater attention to be paid to the facilitation of collaboration.

In order to propose a national approach to the development and sharing of quality learning resources there was an investigation of international and local examples of materials procurement and adaptation and collaborative materials development. At a two-day national workshop with academics who have a keen interest in learning resources development these examples, and possible strategies, were discussed.

The strategy that emerged as the most feasible is the one presented in this section: facilitation of a decentralised network of 'virtual' centres of innovation in course design and development which arise in response to need and which involve providers in diverse ways. The CHE case study research indicates that, even though institutions talk a great deal

about the difficulties of collaboration, four out of ten case studies exemplified successful collaboration. The strategy therefore is consistent with and builds on existing practice.

However, before describing the strategy, it is necessary to point out that, while there are examples of successful sharing of learning resources, there are few examples, even internationally, of successful collaboration in materials development. In addition, various factors may make the implementation of the strategy difficult:

- Because of competition for student numbers from a relatively small pool, many institutions may want to keep their best materials to themselves as part of maintaining a competitive edge.
- Although institutions of higher education claim to be agents of change, organisational structures and processes often prevent them from acting as such. A great deal of momentum is required to 'break through the inertia of existing belief systems' (Moore and Lambert, 1996).
- There may be an assumption stemming from earlier policy proposals that the new dedicated distance education institution will coordinate the process. This notion was not well received by most stakeholder presentations to the CHE. The proposed strategy, however, suggests that different centres of innovation will be coordinated by different providers, depending on competence in particular subject areas.

COMPONENTS OF THE STRATEGY

The following are the components of the proposed strategy:

- A network of virtual centres of innovation in course design and development, consisting of contributing providers organised into teams for the development and sharing of learning resources in response to specific needs and loosely coordinated as a network;
- An information service for course design and development; and
- An enabling policy environment, which provides the necessary framework, quality guidelines for the process, and adequate funding both at national and institutional level.

A network of virtual centres of innovation

Function of centres of innovation

The main function of the centres of innovation would be to design courses and develop learning resources/materials for a particular subject teaching area in response to:

- A nationally or regionally determined need; or
- A curriculum interest shared with other providers.

The centres of innovation could also be engaged in research into innovative methods in course design and delivery.

Nature of 'virtual' centres of innovation

The centres of innovation are described as 'virtual' because they would not require any specific geographic location to operate. They would depend on working relationships between the team members, who might be drawn from a range of contributing institutions.

Each centre would be constituted in a way that suits the specific purpose for which it came into being. This means that the network would have a range of differently configured centres that would emerge organically, and the number of centres would fluctuate over time. Centres would have a limited life span: when the goals had been achieved and learning resources developed, the centre would close and it would not be necessary for resources to sustain it artificially. Within such a needs-driven network, new centres would emerge on an ongoing basis.

Coordination and leadership of centres of innovation

Each centre would take the responsibility for coordinating its own design and development activities. It would not be necessary to have a central coordinating body, because this would contradict the notion of a flexible and responsive network. However, as will be pointed out below, the centres would be connected in a loose network primarily through the role of an agency responsible for coordinating information about learning resources.

Leadership in each centre of innovation would be determined on the basis of competence in teaching the identified curriculum area in which learning resources were being developed. This means that leadership would not automatically reside with the dedicated distance education institutions, although they would be expected to be key participants in centres where they had particular subject expertise and their experience in instructional design and their course production infrastructure would be a valuable contribution to the centres of innovation in which they participated.

Possible types of centres of innovation

Drawing on some of the examples of collaborative teams that emerged from review of selected South African case studies, it is possible to get a practical idea of the kind of centre configurations that one could expect to see. The following are the main types envisaged, although there will no doubt be variations and combinations.

- *In-house development model*
  A specific institution could emerge as a centre of innovation within the network because of its expertise and pioneering work in a particular area. It would take responsibility for developing learning resources in-house and would establish its own design and development team comprised of suitable internal and external people. In this model, the originating institution has full control over design, development, and production processes. Learning resources are used in-house, but can also be made available for use and adaptation by any of the network members. Most dedicated distance education institutions make use of this type of approach to develop their learning resources.

- *Inter-institutional partnership*
  A need might arise for learning resources in a priority area such as teacher education. Selected institutions might agree to co-operate in developing the required learning resources, with each one contributing according to what is required and possible for each partner. This would result in different types of collaboration.
  An example of where this type of collaboration has occurred is in the delivery of the National Professional Diploma in Education, in which certain providers developed some of their own materials but also procured further materials from other providers and entered into different contractual arrangements for each. Other providers did not develop any of their own materials, but acquired what was necessary from a range of sources.
  As a result of such partnership agreements, materials reach more students than they otherwise would. Longer print runs of materials help to amortise the development costs and bring down the unit print costs.

- *Multiple teams centrally coordinated*
  In this type of collaboration, learning resource development teams drawn from a range of institutions are centrally coordinated by one organisation. A good example of this type of collaboration was the South African Institute for Distance Education (SAIDE) Study of Education Project, in which nine mixed-media teacher education modules were developed by cross-institutional teams from a range of organisations.
  These materials are now being used in a wide range of teacher education programmes, and are in demand because they are specifically prepared for active independent learning, strongly contextualised for the South African teaching situation, and equip teachers to meet the demands of the new school curriculum.

- *Regional network*
  A good example of a regional network is the Southern African Development Community (SADC) regional environmental education programme. In 1993, the SADC's Environment and Land Management Sector initiated a programme to support environmental education processes in the Southern African region. The aim of the programme was:

  > To enable networking partners, at all levels, to strengthen environmental education processes for equitable and sustainable development in the SADC region, through

> improved networking, resource material production and increased training capacity. (SADC Regional Environmental Education Centre, 1999, Umgeni Valley Project, Howick, South Africa)

A key task of the programme was to develop, produce, and distribute a curriculum framework for environmental education practitioners in the region. Because contexts across the various countries in the region varied greatly, it was decided not to develop a single curriculum, but rather to create a framework that provides all partners in the regional network with a common vision of how to approach the development of differentiated learning resources that are suitable for their particular contexts.

As seen above, the configuration of centres can be varied, but there are some basic guiding principles that will characterise a well-functioning centre, such as:

- A shared vision of the purpose and outcomes of the learning resources often encapsulated in a curriculum framework endorsed by the partners;
- A strong leading and coordinating team located in a specific institution;
- Good information flow between all parties in the centre;
- Access to suitable expertise;
- Agreed acceptance of roles and responsibilities for the development of the resources;
- Appropriate funding arrangements; and
- Strategies for dissemination of the learning resources developed.

These principles have emerged from the practical examples of collaborative learning resource development cited above, as well as from relevant literature.

An information service for course design and development

Organisation of the information service

For collaborative initiatives in learning resource development, whether on a small or large scale, information is necessary – information about existing materials, other providers with similar interests or particular expertise, and constraints on sharing materials (such as copyright issues).

Although an independent information agency could be established, coordination of interactions between the proposed centres of innovation would not necessarily have to reside with a single agency. However, a common information service is essential.

In the workshop with academics referred to above, there was a strong feeling that, if an information agency were established, it should not:

- Duplicate what already exists;
- Be regulatory; or
- Be identified with any particular institution.

It was also felt that opportunities should be found to link up with national initiatives such as the Education Portal Project, which aims to provide access, among other services, to a database containing a selection of reviewed education-related websites targeted at educators, educational administrators and policy makers, and learners in the school sector. This project has done extensive work in identifying the needs for such a portal, as well as establishing the specifications and systems of the portal itself. Linkages with national projects such as this would be essential for exploring strategies to create a database of learning resources for use in the higher education sector.

Goal and functions of the information service

The long-term goal of the information service (whether or not performed by a separate independent information agency) would be to encourage providers to lodge their learning resources as open content that can be freely accessed by anyone and used as is or re-versioned for a new context. By making learning resources available in the public domain through release of copyright, individuals and institutions do not necessarily have to relinquish their intellectual property rights. Such an arrangement seems particularly appropriate where development of the learning resources is funded by government.

However, the present reality is that most learning resources currently available still have copyright implications. This means that users must be able to gain access to the originating provider to negotiate a license to use the materials for adaptation or re-versioning. This situation will probably continue to exist in the foreseeable future. Users would need information about the types of exchange and transfer arrangements that are indicated for the resources they want to use. Links could be made to the websites of the originating providers where more detailed information could be found about the selected resources and about the kind of licences required for using and adapting the learning resources.

The functions of the information service available to the network of centres of innovation and contributing providers would be to provide:

- An indexed database of available learning resources in specific subject teaching areas;
- Resource links to a selection of reviewed education-related web sites;
- Information about:
  - Funding sources and how to access funds;
  - Capacity building services that are available;
  - Licenses and contracts; and
  - Copyright conditions;

- Guidelines and other support mechanisms on different methods of acquiring learning resources, such as transfer, adaptation, re-versioning, and a range of collaboration methods; and, in due course,
- Access to open content resources developed by selected centres of innovation.

As centres for innovation and the information service become operative, the role of publishers within the process would need to be considered. They could be collaborative partners in a centre of innovation, and could play a role in quality assurance or in disseminating the learning resources that are developed.

Enabling policy environment

Because of the difficulties of collaboration and the environmental factors mentioned above, the Ministry will need to establish conditions under which collaboration in course design and development becomes not only possible, but makes a contribution to the quality of teaching and learning that is on offer.

Funding

The development of quality learning resources demands financial and human resource investment for which many institutions do not adequately budget. Among the main macro influences that seem to impact negatively on the ability of institutions to work together in the common pursuit of learning resources development is the allocation of financial resources.

The question of funding is one of both policy and incentive. Thought needs to be given to the idea of coupling funding incentives to learning resource development, particularly in areas of national priority like science, technology, and health. In such instances, funding is used as a lever to achieve a desired national goal. Centres of innovation would submit proposals for the development of particular learning resources and funding would be granted on merit.

In the new funding framework for public higher education, it would be possible to fund the development of learning resources out of the proposed teaching development fund. It is also suggested that the Department of Education initiate discussions with the Department of Labour to make available funds for learning resource development through the Sector Education and Training Authorities (SETAs), and that consideration be given to the use of donor funding for the development of resources in areas of national need.

Institutional recognition for learning resource development

In South African higher education, providers are rewarded for their research record, and there is generally no recognition of either individual academics, units and departments or the institution as a whole for excellence in teaching and learning or, more specifically, for the time-consuming and difficult process of developing high quality learning resources.

Enabling policy at institutional level would need to include:

- Recognition that involvement in developing learning resources is part of the learning and teaching strategies deployed in the institution;
- Incorporation of learning resource development into the workload of lecturers and the allocation of adequate time for the development of such resources; and
- Provision of professional development for lecturers as they move into a new role as materials developers.

Setting of standards for quality learning resource material

In the same way that the HEQC has set guidelines for good practice in teaching and learning, it is important that guidelines for quality material resource development are also established.

It is proposed that the network of centres of innovation be linked with existing regulatory and quality assurance agencies. A regulatory body like the HEQC could possibly accommodate, through its quality promotion and capacity building functions, a specific 'learning resources' focus.

Existing expertise in quality assurance located in various organisations and institutions could also be harnessed for this purpose. Nadeosa, SAIDE, the dedicated distance education institutions, and face-to-face institutions that offer programmes using distance education methods might usefully be drawn into the process, assisting with evaluations and capacity-building in this field.

As has been noted, national criteria for distance education provision already exist and have been further developed by Nadeosa as part of its biennial courseware awards. These could be used as a resource for the development of a national framework of criteria that is applicable to all institutions. Another resource that could feed into the above process is the criteria for the development and evaluation of quality learning materials developed by Nadeosa.

ISSUES REQUIRING ADDITIONAL CONSIDERATION WHEN DEVELOPING AND SHARING QUALITY LEARNING RESOURCES

Institutional readiness for partnerships and collaborative learning resources development

Many efforts at collaboration that start off well run into difficulties because not enough thought was put into assessing the needs and kinds of resources required. Key elements that have to be in place for successful partnerships and collaborative projects are strong funding support, a range of necessary expertise, institutional support, policy supports and incentives.

The reference group comprising academics who participated in the learning resources workshop compiled the following list of elements that have contributed to successful partnerships and collaborative projects:

Rationale and incentives

- Mutual interest and benefits proved to be an important foundation on which collaboration was built.
- Insistence on joint recognition and equality of the partners helped to reduce tensions and conflicts considerably.

Institutional readiness

- Institutional readiness to collaborate in terms of infrastructure, financial support, and available expertise.
- Support of senior management.
- Well-developed curriculum and course outlines by the partner institutions made it easy to incorporate the shared learning resources.
- A clear understanding of the need to develop both the materials and the delivery systems of the course or programme.

Thorough planning

- Design of a reliable management business plan that is informed by an accurate needs assessment.
- Capacity-building strategies incorporated into the design of the collaborative project.

Strong project management

- A competent convenor who has a positive outlook and who fosters cooperation and teamwork.
- Clear definition of roles for the partners involved in the development process.
- Locating the coordination of the collaborative project within an enabling environment.

Adequate capacity

- A small team that has the right blend of expertise.
- Inputs by specialists into the design and shape of the programme at crucial times resulted in a better product.
- A representative reference group of people who work in the field and who make inputs at crucial times helps to build contextual realities into the materials.

Apart from the institutional readiness of working in partnerships, individual institutions also have to create the kind of organisational infrastructure and systems that allow for more flexible learning and teaching methods. The following extract points to some important areas that need attention:

Courses

- Entry arrangements which ensure greater access and equity for students from various backgrounds.
- Degree and course plans which set out specific learning outcomes and generic graduate qualities, and the ways in which each will be achieved.
- Course content which takes account of students' backgrounds and recognises that we live in a global community.

Teaching and learning

- Use of learning materials and technologies which are appropriate to the subjects and needs of students.
- Teaching methods which free up time, place, mode and pace of learning.
- Information literacy and support programmes which assist students to become independent lifelong learners.

Organisational arrangements

- Teachers working in networked partnership with academic support specialists.
- Organisational structures, planning and resource mechanisms which enable rapid, networked support to flexible learning.
- Collaborative networks across campuses and with outside bodies in order to free up modes of teaching and the range of courses available anywhere, any time.

Evaluation of experience and practice in flexible learning

- Research into the educational, social, technological and policy issues underpinning university teaching and learning in a rapidly changing environment. (Moran and Myringer, 1999: 61–62)

An enduring problem, particularly in face-to-face institutions, is lack of understanding of what it takes to develop learning resources for flexible delivery methods. The organisational arrangements are not geared for this change in the roles of educators, and usually no additional time and resources are allocated that would facilitate such activities.

Copyright issues

Without proper attention to copyright issues, collaborative projects set up to develop and share learning resources are doomed. Numerous examples, both in South Africa and internationally are testimony to this potential problem. Tony Dodds captures the copyright challenge well when he comments:

> Issues of intellectual property and copyright, moreover, which are being recognised as barriers to materials exchange throughout the world, will continue to complicate collaborative ventures in the sub-region. (Dodds et al., 1999)

Douglas Shale endorses this view and adds that the use of technology complicates the issue even more.

> Many issues arise from the transition brought by videoconferencing and the Internet/ Web. The time-worn issue of copyright and intellectual property will become even more problematic. The academic will believe that he or she owns the course because that is the situation with lecture materials. However, because a course can have an abiding life independent of the creating academic, the university must also have some rights regarding course use and revision. (Shale, D. 1999)

Tension between the needs of originators of articles and materials and the need for providing open access to these to a network of partners will probably always exist. The challenge is to work within international and national copyright regulations, and to explore what can be done to facilitate transfer and widespread use of these learning resources.

Some key issues that would need to be resolved are:

- Open content and how to avoid it being used for financial gain;
- The possibilities of joint copyright; and
- Copyright conditions for e-learning.

The following serves as an example of the kinds of conditions applied by Unisa to any institutions wanting to use or adapt any materials that Unisa has developed.

An annual licensing fee is levied. The fee is based on the number of students who will use the material. If the institution wants electronic access to the materials, a separate agreement is entered into. Unisa holds copyright over all materials that it has been involved in generating. Where it has partnered other institutions, they are contractually bound to seek permission from Unisa before making any adaptations. In Unisa's case, these contracts are drawn up by their in-house legal department. DALRO could conceivably be approached to perform the same function.

It is anticipated that the findings of the national investigation commissioned by the Department of Arts and Culture recently to examine, *inter alia*, how best to ensure that intellectual property serves to empower marginalised communities by facilitating a free flow of information, will benefit any initiatives set up to establish the 'network of centres' discussed above.

The changing role of publishers

Technology is changing what publishers do and how they do it. This has started to impact on the different functions and roles played by this sector. Various functions previously bundled together can now be more easily separated out. This has led to a range of different kinds of publishing models:

- *The traditional model.* A publisher who does everything for you, develops, produces, markets, and sells the book.
- *The customised model.* The lecturer selects from a variety of content and chooses a delivery form. The publisher packages it as required.
- The POD (Print on Demand) model. Content is developed and kept in digital storage and only printed out upon demand.
- *The partnership model.* The institution/lecturer and the publisher form a collaborative arrangement. The institution/lecturer develops and controls content and quality, the publisher is responsible for production, marketing and distribution.
- *The open access model.* Content is made freely available subject to conditions specified in an open content licence. This usually ensures that the content cannot be sold or changed without permission, hence ensuring a measure of quality control.

The roles that publishers can play include some or all of the following, depending on the collaborative arrangement agreed:

- Publishers can be collaborative partners in the same way as other organisations. In fact, academic publishers who create teams of authors are often the facilitators of collaboration, given that they commission authors from different institutions and develop material for students from a range of institutions.
- Publishers can play a quality assurance role, ensuring that content is assessed and reviewed especially in relation to its intended audience.
- Publishers can play the role of producers, preparing, formatting and packaging content in different forms (print, web-based, CD, etc.).
- Publishers can promote content and inform people about it, letting the intended audience know that it exists.
- Publishers can distribute and disseminate content.

In each of these instances, publishers can provide the finances for what comprises, in each case, specialised and costly activities.

SUMMARY

In the 1997 White Paper, the Ministry expressed its support for the development of high quality learning resources in higher education:

> The Ministry supports the development of a national network of centres of innovation in course design and development, as this would enable the development and franchising of well-designed, quality and cost-effective learning resources and courses, building on the expertise and experience of top quality scholars and educators in different parts of the country. (DoE, 1997)

In order to give effect to its support, the Ministry should establish an enabling environment in which a virtual network of centres of innovation in course design and development can flourish.

This would necessitate commitment from the Ministry to:

1) *Advocate the establishment of a virtual network of centres of innovation in course design and development.*
   The proposed network of centres would spread the course design and learning resources development function across institutions, create diverse opportunities to involve the dedicated distance education institutions and encourage a rich mix of inter-institutional, cross-institutional, and regional collaborative ventures in the development and sharing of learning resources. The centres of innovation are described as virtual because they would not require any specific geographic location to operate. They would depend on working relationships between the team members, who might be drawn from a range of contributing institutions. Each centre would be constituted in a way that suits the specific purpose for which it came into being. This means that the network would have a range of differently configured centres that would emerge organically, and the number of centres would fluctuate over time. Centres would have a limited life span: when the goals have been achieved and learning resources developed, the centre would close. Within such a needs-driven network, new centres would emerge on an ongoing basis.

2) *Set up and fund an information service.*
   This service could be located within an appropriate existing structure(s) so as to avoid unnecessary duplication. It is suggested that linkage with other national information service projects such as the National Education Portal should be further investigated. The information service would provide information about existing materials, about other providers with similar interests or particular expertise, and about constraints on sharing materials (such as copyright issues). It would also provide information on funding.

3) *Establish mechanisms for centres of innovation to access funds.*
Funding arrangements that currently prevail often inhibit institutions from sharing and using each other's resources. When institutions are locked in competition with each other for student numbers, their willingness to cooperate in initiatives that they perceive as compromising their income base is diminished. Some mechanisms for consideration are:
   a) Identification of areas of national need where learning resources would be necessary, and provision of funds for materials development in these areas.
   b) Making available funding (possibly from the teaching development fund in the new funding framework) for centres of innovation to put forward proposals for the development of learning resources. Funding would be granted on the merit of proposals, which would be assessed by a specially appointed team.
   c) Recognition of the development of learning resources as teaching outputs, and reward of institutions for their development and production.

4) *Ensure the development of guidelines for the production of quality learning resources.*
Existing processes of quality promotion should be strengthened by providing a specific learning resources focus. A framework of guidelines would provide the direction necessary for institutions to begin to transform practices that are counterproductive and costly, and to embark on collaborative learning resource development practices that will result in quality resources where economies of scale can offer economic benefits in the long term.
Cognisance needs to be taken of the underpinning principles that inform the proposed strategy. These include creating an enabling environment in which a network of centres of innovation for collaborative resource development can flourish. Equally important is identification of the most appropriate mechanisms by which information and resources can be effectively shared, including the challenge of lodging open content resources on the Web for wide access.
Implementation of such a strategy is highly complex, and needs careful consideration. It is therefore proposed that the Ministry of Education establish a specialist task team to further investigate the above proposals and strategy and to support and review pilot initiatives prior to expanded implementation.

SUMMARY AND CONCLUSIONS

INTRODUCTION

In this section, key points are summarised and conclusions are drawn, with reference to earlier chapters as appropriate.

THE RESEARCH PROCESS

This extensive investigation was conducted under the auspices of a specially constituted CHE Task Team, supervised by the Chief Executive Officer of the CHE, and conducted by the South African Institute for Distance Education (SAIDE) and a number of other contracted researchers.

The investigation included background research, stakeholder submissions to the CHE Task Team, ten case studies of distance education programmes or courses, including detailed costings of one course in each case study, international case studies around funding and regulation, a workshop to develop funding possibilities, interactions with the Higher Education Quality Committee, workshops to propose ways of collaborating in learning resource development and dissemination, and a seminar of international experts to interrogate the approach and findings of the investigation.

THE SIGNIFICANCE OF DISTANCE EDUCATION

Distance education makes a major contribution to higher education provision in South Africa. In 2001, there were about 126 000 full-time equivalent (FTE) students, or about 286 000 headcount students in declared distance education in public higher education institutions. This provision constituted 29% of all FTE students in public institutions, or 43% of all headcount students. Given that it is sometimes difficult to determine who is a distance student and that, by declaring students to be distance education students, institutions receive a lower subsidy from the state, these figures are almost certainly understated, especially in graduate study.

The following general characteristics can be discerned. Distance education is:

- Dominated by the dedicated distance education institutions, which account for 73% of university-declared distance education FTEs and 88% of technikon-declared distance education FTEs in 2001;
- Concentrated in Education, Economics and Management Sciences and the Humanities, with two out of three FTEs in the field of Eduation being in distance education, and nearly one out of two in Economics and Management Sciences; and
- Primarily at first qualification level.

Furthermore, distance education students are:

- Largely over 23 years of age (80% of headcount students), but include a substantial number of students (50 000 headcount students) younger than 23;
- Predominantly African (57% compared to 47% in face-to-face university provision in 2001 and 76% compared to 74% for face-to-face technikon provision); and
- Mostly women at universities (61% compared to 53% for face-to-face provision), and men at technikons (57% compared to 50%).

Fifty-five percent of all African headcount enrolments in universities in 2001 were in distance education.

Distance education thus constitutes a substantial portion of the public higher education sector, providing access to large numbers, and significant proportions, of African students, women students, working students and students over 23. It also offers opportunities to a growing number of young full-time students who cannot access or afford traditional face-to-face provision.

With regard to private higher education, there is no comprehensive information available. However it is clear that much of private distance provision is in partnership with public institutions and is thus accounted for in the analysis above. The recent Human Sciences Research Council's (HSRC's) Human Resource Development Review (2003) analysed information from the DoE of 86 registered providers in 2001 and concluded that there were only some 30 000 total headcount enrolments for 'own certificates' (HSRC, 2003: 421). CHE information[22] for 2003 gives 17 registered private institutions providing distance education programmes. Most of these are very small providers. It can thus be safely concluded that distance education in the private higher education is currently of limited significance.

THE NATURE OF DISTANCE EDUCATION IN SOUTH AFRICA

Descriptions from stakeholder submissions to the CHE Task Team and the case study research point to a wide variety of provision under the broad rubric of distance education (referred to variously as *flexible learning, telematic learning, integrated-learner-centred, multi-modal,* and *off-campus,* among other names).

In the case studies, the most important feature to emerge was the rich variety of methods used. Examples of provision range from a textbook with a wraparound study guide and an examination, through interactive television (satellite broadcasts) and use of videos for discussing case studies, to highly innovative delivery using a mix of methods including regular fortnightly contact sessions at decentralised rural locations, one-on-one support in the mother tongue, considerable work-based mentoring, and formative assessment strategies

22 E-mail communication from Mr Theo Bhengu of the HEQC on 2 March 2004.

that include tracking of student progress through portfolios. The characteristics of the case studies are described in Chapter Three above.

However, examples of 'typical provision of large enrolment courses' in the case studies from the dedicated distance institutions, which together constitute over 75% of distance education provision, and knowledge of the large-scale distance education programmes at face-to-face institutions point to the conclusion that most distance education provision relies heavily on printed materials. This is realistic, as many students do not have sustained access to other technologies.

However, in many cases it appears that 'contact' sessions are optional and not easily accessible, and that in some cases even assignments are optional. (In the CHE case study sample, students who elected to do these did not receive individual feedback, only a general memorandum was sent out.) As access to information and communication technologies (ICTs) grows, no doubt interaction between student and lecturers will increase but, for the foreseeable future, such provision will exclude more marginal groups of students.

These observations require that the notion of convergence between face-to-face and distance education be interrogated and that of the continuum of higher education provision be refined.

The continuum

The notion of a continuum of educational provision with two imaginary poles, one purely face-to-face provision and the other purely distance provision, where distance is defined as separation between students and educators in space and/or time, remains useful. However, the argument that all higher education provision is tending towards the centre of the continuum is not reflected in current practice. While there is some evidence of use of a mix of distance and face-to-face education *methods* in a few programmes, most provision tends to occur using the methods that characterise provision at either the face-to-face or distance poles. Furthermore, while it is hypothetically possible, there is little evidence of any larger-scale systematic planning to suggest that a convergence towards the centre will gather momentum in the short-to-medium term. It is thus inappropriate to accept the notion of convergence of educational provision. There are, however, instances, exemplified by some of the case studies, where there is a genuine mix of methods employed, that fall in the central portion of the continuum described.

Furthermore, while a shift towards the centre of the continuum will provide a richer mix of methods in some instances, general convergence to a very narrow middle section of the continuum would be undesirable. Distance education places emphasis on providing flexible learning opportunities, particularly for adults, at a time and place convenient to them and with special emphasis on independent study. This focus of distance education provision is different from that of face-to-face provision.

Finally, assertions that distance and face-to-face *methods* used in provision are not distinct, as a consequence of technological developments, are flawed. The added complexity of a few educational methods using ICT that cannot simply be categorised as either 'distance' or 'face-to-face' is no reason to suppose that historically germane distinctions about different methods do not retain their validity.

The investigation pointed to a clear role for the dedicated distance education institution to *focus* on distance education provision within this continuum. However, almost all the stakeholder presentations to the CHE Task Team submitted that a monopoly on distance education by the new dedicated distance education institution is neither feasible nor desirable.

While there is consensus that distance education requires particular expertise and systems, it is evident from the detailed case studies that some predominantly face-to-face institutions have acquired such expertise and have developed systems to produce high quality materials and to organise extensive learner support in rural areas. Therefore, while face-to-face institutions should remain predominantly on the face-to-face portion of the continuum, carefully considered proposals to move into distance education should be accepted, and those that are currently on offer should continue, subject to the proposed quality assurance mechanisms.

THE ROLE OF DISTANCE EDUCATION

The role of distance education in South Africa can be described as follows:

1. Providing access to students for whom – either because of work commitments, personal social circumstances, geographical distance, or poor quality or inadequate prior learning experiences – traditional, full-time contact education opportunities are inappropriate or inaccessible.

   This reason is possibly the key motivating factor behind the use of distance education methods. It is illustrated by the CHE investigation, which shows that distance education is a major access mechanism for African students, women, older students, disabled students, students wishing to study part-time, and young students who cannot afford fees at face-to-face institutions or cannot afford to move from their domiciles to the seat of a face-to-face institution. Provision has been stimulated partly by growing awareness of the importance of lifelong learning and corresponding attempts to respond to market needs, as well as encouragement from the White Paper.

   Face-to-face institutions have also used distance education methods to extend access to niche programmes, especially at the postgraduate level. However, in some cases provision has also been motivated by dwindling student numbers in some of the more traditional areas of educational provision, and a corresponding need to find new educational

markets. Some institutions are offering distance education programmes to students in the rest of Africa. UNISA, for example, had over 10 000 such students in 2001.

2. Seeking to expand access to educational provision to significantly larger numbers of learners.

   This reason is linked to, but not the same as, the previous one. Its difference lies chiefly in the scale of programmes. Many programmes motivated by a desire to provide access to students who would be denied access to traditional full-time face-to-face education do not really have goals of reaching significantly larger numbers of learners. Indeed, it is notable that large-scale distance education programmes are, in general, confined to a few educational fields. Most other programmes reviewed tend to be small-scale interventions, although it is fair to suggest there may be a change in this regard as alignment between industry/commerce and programme providers gathers momentum.

   Taken as a whole, distance education is responsible for dramatically increasing levels of participation in higher education, often through high enrolment courses. For example, at UNISA, about 260 courses/modules in 2002 account for over 400 000 course enrolments.

3. Shifting patterns of expenditure to achieve economies of scale by amortising identified costs (particularly investments in course design and development and in effective administrative systems) over time and large student numbers.

   This reason draws together the above two motivations, and has been an underlying economic rationale for many distance education institutions around the world. Its success depends on limiting numbers of courses, while maximising enrolments on these courses. Many distance education programmes simply have no intention or capacity to exploit these economic benefits. In this regard it is worth noting that while less than one tenth of UNISA courses/modules account for nearly 80% of its course enrolments, the vast majority of UNISA courses have less than 100 enrolments.

These reasons can be contrasted with those pertaining to the use of resource-based learning described in Chapter Four of this document.

A FRAMEWORK FOR DISTANCE EDUCATION PROVISION

The CHE distance education investigation has identified the importance of the distance education sector in higher education. However, mechanisms need to be found to steer the sector in a way that will enhance the vast potential of distance education to fulfil its wide-ranging roles, while simultaneously stimulating transformation of the sector. It is the view of the CHE that it will be essential and beneficial for institutional heads to have an operational framework that rewards good practice and prevents practices that exploit students and waste vast resources.

The current mechanisms for steering the higher education system are threefold:

- Funding arrangements;
- Quality assurance; and
- Institutional planning.

Chapters Five and Six deal in great detail with funding and quality assurance respectively. The resulting proposals are summarised below

Funding

The detailed costings of ten distance education courses/modules clearly demonstrate that running distance education effectively is a more expensive exercise than running correspondence education, and that programmes implementing thorough course design and development processes, as well as extensive learner support, may well require more than the 50% subsidy currently proposed. However, it is critical that such programmes first demonstrate in their plans exactly how they propose to achieve these goals, before they are granted additional funding. Applying a blanket increase is likely simply to perpetuate inefficient financial practices, without providing any guarantees of improved quality of delivery.

Chapter Five proposes that:

1. Distance education programmes at the undergraduate and honours levels should receive 50% of the FTE input subsidy of contact programmes, as is currently proposed in the Ministry of Education funding framework.

However:

a) It should be confirmed that enrolments on upper postgraduate distance education programmes should receive the same input subsidy as face-to-face enrolments.
b) All other courses, including those that may be seen as 'distance' education courses, at traditionally face-to-face institutions with enrolments of fewer than 50 full-time equivalent students per course should receive full input subsidies. There are three reasons for this:
   - First, it is likely that conceptual slippage in terms of what is defined as 'distance education' tends to occur primarily among smaller programmes, and this additional policy point will remove the need for unnecessary and costly policing of the funding formula.
   - Second, the empirical research suggests clearly that per-student costs of small distance education programmes are actually at least as high as, if not higher than, the equivalent delivery of contact programmes (because these programmes are not able to exploit economies of scale).

- Third, as scales of operations at this end of the spectrum are small, this will have limited impact on financial flows within the system.

c) Teaching output subsidies should be confirmed to be the same for all programmes, regardless of the mode of delivery.

2. Any institution – including the dedicated distance education institution – should, through the Institutional Profile it is required to submit, be entitled to apply for a special increase in the input subsidy it receives for a distance education course/programme (ranging from 51% to 100%).

   Any proposals received for this will need to be for courses with an agreed minimum enrolment, proposed to be 300 students to begin with. The Ministry, depending on how it wishes to steer the system, could adjust this figure. Institutions applying for increased subsidies will need to motivate how the additional expenditure required will improve the quality of provision, and will also be expected to report on any funding received, to demonstrate that it was spent on the course/programme for which it was provided.

3. A funding mechanism should be developed that provides some form of subsidy to institutions, and especially to the dedicated distance education institution, for successful completion of single courses by students who do not ever intend to complete an entire programme of study or who are completing their qualification at another institution (whether in face-to-face or distance education programmes), provided some evidence can be offered upfront that such students do indeed not intend to complete programmes of study or that they are enrolled elsewhere.

   The merits of the approach outlined in 1, 2 and 3 above are described in detail in Chapter Five. Briefly:

   - It does not propose to use policy to achieve any equalisation in funding of distance and face-to-face education. Instead, providers of distance education programmes must motivate why they require additional funding and demonstrate that additional spending will go to improving quality of programmes.
   - The ability to claim additional subsidy can be used by the Ministry of Education to signal specific policy preferences it may have. This is in alignment with the notion of using funding as one of the three steering mechanisms for higher education.
   - Insertion of minimum numbers (before a programme is considered 'distance' and particularly before it can qualify for additional funding) provides simple levers for government to set policy direction. Over time, the effect of shifting these numbers upwards or downwards can send clear messages about the direction in which the Ministry of Education wishes to see distance education develop.
   - Establishment of a cap below which programmes are not considered to be 'distance' will remove the possibility of misrepresentation to qualify for higher subsidies. This

will simplify system administration over time, and reduce the need for policing at the margins of the system.
- Most importantly, the above approach provides clear incentives to invest in improving the quality of distance education practices. Distance education reaches large numbers of higher education learners, and is a critical strategy for achieving re-distribution of skills and equity in South African higher education. The above system would focus spending on those committed to improving quality, to the benefit of the country as a whole.

There are various requirements for the success of the above proposal, and these are also elaborated in Chapter Five. Briefly, they cover:

- Use, in the longer term, of the Teaching Development Grant category in the new funding framework for additional funding of distance education on the basis of submitted proposals, but immediate establishment of an interim Teaching Development Grant;
- Preparedness by the Ministry of Education to signal specific policy preferences; and
- A definition of distance education for funding purposes.

The seminar held in September 2003 in Cambridge, England, developed an initial definition for funding purposes. This was then refined as follows:

- Education where delivery at a distance (spatially and/or temporally) is the predominant means of teaching and learning.
- In addition, the above can be qualified to refer to education where the instructor and student are in the same location for less than a certain percentage of the time. Initially, distance education might thus be referred to as education where more than 70% of notional learning hours is for independent study.
- To be identified as distance education at a predominantly face-to-face institution for funding purposes, a programme must have a full-time equivalent (FTE) enrolment of more than say 50 students.

Quality assurance

Examples of good practice in distance education were identified in the case studies. These include evidence of appropriate preparation for programme delivery and an innovative approach to distance education, which:

- Involves thorough situational analysis before embarking on programme design and development;
- Entails research on student profile to inform the development of the programme;
- Develops a well-structured recognition of prior learning process for admission and accreditation of prior experience and skills;

- Acknowledges the centrality of learning materials in distance education by providing well-developed resources for independent study, with carefully scaffolded conceptual knowledge and skills, that is learner-centred, relevant and accessible;
- Engages students in practical, work-based activities integrating theory into applied contexts;
- Creates enough flexible opportunities for students to develop their conceptual understanding and reflexive skills (at least half the programmes in the study used a problem-based approach to learning and teaching);
- Offers ongoing academic support. In two instances mentioned above, support is offered to students in remote rural areas through a network of decentralised learning centres and one-on-one in the workplace. Feedback is given on all tasks and equally students are given the opportunity to share their experiences with other students;
- Implements continuous, formative assessment strategies. In the majority of programmes researched as part of the case study process the year mark counted between 20% and 60% towards the final mark allocation. One programme in particular has no traditional examinations, but implements a range of continuous, formative assessment processes including self- and peer-assessment and portfolio evidence of cumulative study activity and work-based tasks that have been undertaken;
- Includes collaboration with key stakeholders in design and delivery, thus ensuring congruency with specific needs. In two of the case study programmes, partnerships have been set up with national departments. There is also one example of a programme in which a provincial department is actively involved in the delivery process and one which is delivered in partnership with a large parastatal.

Policy documents, stakeholder comment and the CHE case study research also reflect that there are concerns with the quality of much distance education that is on offer – in both dedicated distance education and predominantly face-to-face institutions. Examples of poor practice are as follows in:

- Materials development (inadequate time spent on design);
- Use of technology (uncritically adopted and not properly integrated into the course as a whole);
- Student support (contact sessions regarded as an optional extra, rather than being integrated into the course design);
- Assessment (absence of formative assessment);
- The level of exit level outcomes for some programmes;
- Throughput rate (particularly in the longer programmes offered by the dedicated distance education institutions).

During the past decade, there has been an effort to address the quality of distance education provision. However, although these measures have had some effect, they were not sufficiently far-reaching. The Higher Education Quality Committee (HEQC) requires a set of strategies not only to describe quality and advocate it but also to ensure that providers

embrace quality actively and, even if reluctant, are obliged to conform their practice to certain minimum standards.

Chapter Six suggests a number of strategies for assuring the quality of distance education provision:

1) Distance education concerns should be infused into the HEQC's Audit and Accreditation Criteria and processes.

2) A comprehensive and up-to-date set of quality criteria for distance education should be developed and applied by the distance education community in South Africa.

3) All distance education programmes, whether offered by dedicated distance education institutions or predominantly face-to-face providers, should be required to meet a set of minimum targets, and the HEQC should undertake periodic checks to ensure that this is happening.

4) The HEQC should conduct additional reviews for distance education with financial support from the Ministry, select large-scale existing distance programmes with a particular programme focus (such as teacher education), reach consensus on minimum targets through a collaborative process with relevant providers, and then apply the agreed minimum targets rigorously to all selected programmes.

5) Institutions wishing to offer new distance education and online programmes should be required to meet a set of criteria related to institutional readiness, especially in regard to the necessary systems.

Institutional planning: The role of the dedicated distance education institution

The investigation concluded that the dedicated distance education institutions are not under threat on account of the following:

- The declines in enrolment between both UNISA and TSA in particular fields such as the humanities, education and police studies occurred for clear reasons.[23] In most cases these were not related to competition from the face-to-face institutions.
- The major competition for UNISA arose from the low-cost, low quality, and high profit teacher education diploma programmes which constitute over 65% of distance education FTEs at predominantly face-to-face universities. The quality assurance mechanisms proposed in this Policy Advice Report would ensure that no programmes would be allowed to operate in this manner.

23 Reasons include (i) teachers were no longer rewarded on the DoE salary scale for completing general BA degrees, (ii) UNISA placed a moratorium on enrolments in Education courses while these were revised and (iii) the requirement that police officials participate in the TSA diploma was dropped.

- Although from 1996 to 2000 UNISA headcount enrolments dropped by about 16,500 headcounts, they surpassed their 1996 figures in 2001 by enrolling 130 000 students and have continued to grow in 2002 (about 139 000) and 2003 (nearly 145 000).
- Enrolment at TSA has not recovered from its highest level of about 80 000 that included over 40 000 police studies students. This lack of growth is unlikely to be on account of competition, since only one face-to-face Technikon has major distance education programmes and this is in a field where TSA is not active.
- Generally lower fees at the dedicated distance education institution, possible on account of the realisation of some economies of scale, will ensure that it remains highly competitive.
- Extrapolating from 2001 data, the new dedicated distance education institution will have at least 200 000 headcount students (i.e. 30% of the headcounts in the public higher education sector) or at least 97 000 FTE students (i.e. 22,5% of the FTEs in the public higher education sector). The new UNISA will thus be a mega-institution by any definition.[24]

The Minister's Working Group on Distance Education of 2001/2 projected the vision of the dedicated distance education institution as 'a truly African higher education institution that explicitly serves the development needs of our country'. This vision underpins the key roles of the dedicated distance institution highlighted in the CHE investigation.

The dedicated distance institution should be required to sharpen its mission and to set specific goals for itself. In particular, it should not attempt in terms of provision to meet every higher education need but should concentrate on areas where economies of scale can be achieved, or where there is express national need.

In this regard, the specific meaning of the new dedicated distance institution being a 'comprehensive' institution requires strong interrogation. While the merger enables programme offerings that range from technical to academic and from certificate level to doctoral, it is questionable that the new institution can offer programmes in all fields and disciplines at all levels without compromising quality. Niche, and especially small-scale, programmes should be offered by those institutions that have the expertise and capacity to do so and should not automatically be located at the dedicated distance institution. With increased use of ICT, it becomes viable for all institutions to offer niche programmes to students across the country.

Drawing on various institutional presentations and submissions made to the CHE Task Team, the *Draft Report of the Working Group on Distance Education* 2001/2 the SAUVCA Occasional Paper, *Learning Delivery Models in Higher Education in South Africa,* 2003, and deliberations with international distance education specialists, it is suggested that the new dedicated distance education institution should:

24 It might also be mentioned that participants in the consultation in September 2003 Cambridge, England, highlighted the way the entry of other institutions into distance education had had very positive effects on the UK Open University.

- Increase meaningful access to higher education, particularly for working and poor people in the far corners of the country, and generally the disadvantaged;
- Increase access through providing affordable opportunities and through flexible entry requirements;
- Concentrate mainly on large-enrolment courses so as to benefit from economies of scale, especially those contributing to formative degrees;
- Develop its capacity in distance education delivery through reflective practice; including staff development processes;
- Develop and implement its potential for offering decentralised student support nationally;
- Engage particularly in research and development of distance education practices, and contribute extensively to the national debate in this area;
- Play a key role in building a national infrastructure, in collaboration with face-to-face institutions. This could have at least two major focuses:
  - Establishing shared, properly staffed and managed, well equipped and maintained, jointly financed higher education learning centres.
  - Developing and coordinating a national information technology network primarily for teaching purposes.

Institutional planning: The role of the predominantly face-to-face institutions

Currently distance education constitutes between 4% and 32% of FTEs at those nine traditionally face-to-face universities offering distance education. Altogether, only 10.96% of total FTEs at face-to-face universities use distance education, while for technikons the figure is 4.74%.

There is clearly a need for face-to-face institutions to continue to offer predominantly face-to-face programmes, but this should not be rigidly applied. For example, it may well be that the University of Fort Hare or the University of the North could best fulfil their declared regional development role by offering many of their programmes on a part-time basis to adults across their regions. Realisation of such institutional goals would almost certainly involve substantial use of distance education methods.

According to the strategies for ensuring quality described above, each of these programmes developed would be considered to be a new programme and as such would require new accreditation from the HEQC. This accreditation process would include demonstrating institutional readiness to offer such a distance programme, as well as fulfilment of a range of criteria governing quality distance education provision. If under such circumstances, an institution shifts to offering a large proportion of distance education programmes, this should be entirely acceptable.

It is thus suggested that the Ministry should not restrict the educational methods that institutions use to fulfil their missions and achieve their goals, as the accreditation processes being put into place in the HEQC for any programme moving into distance education are

now sufficiently refined to ensure that the quality concerns of the Ministry will be resolved. With regard to existing programmes, recommendations 3, 4, and 5 above for ensuring quality will ensure that reasonable levels of quality are achieved.

Moreover, it is suggested that the Ministry should not apply any additional criteria to the predominantly face-to-face institutions in offering distance education programmes, except insofar as any programme moving from a predominantly face-to-face mode of delivery to a predominantly distance education mode of delivery would require new accreditation from the HEQC. The normal criteria for adjudicating the agreed programme and qualification mix should be applied. In particular it should be noted that applying 'caps' of lower than around 500 contradicts the financial logic of distance education.

It is, however, clear from stakeholder representations that the Programme and Qualification Mix (PQM) process urgently needs to be refined, especially with respect to the concept and functioning of regional clearing houses and participation of the new UNISA in these, as well as what is understood by *unnecessary* duplication. Any judgement on duplication/ overlap would need to be based on an investigation to establish what was the 'same' or 'different' about any given programme. Equally, issues of quality, the area targeted (regional or national), whether a programme is a niche programme or not, and the need for such a programme (number of students) would need to be taken into consideration.

LEARNING RESOURCES

In the 1997 White Paper on higher education, the Ministry expressed its support for the development of high quality learning resources in higher education:

> The Ministry supports the development of a national network of centres of innovation in course design and development, as this would enable the development and franchising of well-designed, quality and cost-effective learning resources and courses, building on the expertise and experience of top quality scholars and educators in different parts of the country. (DoE, 1997)

In order to give expression to this support, Chapter Seven proposes the establishment of an enabling environment for a virtual network of centres of innovation in course design and development.

This would necessitate:

1. *Advocacy of the establishment of a virtual network of centres of innovation in course design and development.*

   The proposed network of centres would spread the course design and learning resources development function across institutions, create diverse opportunities to involve the

dedicated distance education institutions, and encourage a rich mix of inter-institutional, cross-institutional, and regional collaborative ventures in development and sharing of learning resources. The centres of innovation are described as virtual because they would not require any specific geographic location to operate. They would depend on working relationships between the team members, who might be drawn from a range of contributing institutions. Each centre would be constituted in a way that suits the specific purpose for which it came into being. This means that the network would have a range of differently configured centres that would emerge organically, and the number of centres would fluctuate over time. Centres would have a limited lifespan: when the goals have been achieved and learning resources developed, the centre would close. Within such a needs-driven network, new centres would emerge on an ongoing basis.

This decentralised notion was developed in response to stakeholder enthusiasm, as well as concern that any one institution should not dominate the potentially ideologically powerful process of developing learning resources for widespread use.

2. *The establishment and funding of an information service.*

This service could be located within an appropriate existing structure so as not to duplicate existing infrastructure unnecessarily. It is suggested that linkage with other national information service projects such as the National Education Portal should be further investigated. The functions of the information service available to the network of centres of innovation and contributing providers would be to provide:

- An indexed database of available learning resources in specific subject teaching areas;
- Resource links to a selection of reviewed education-related web sites;
- Information about
  - Funding sources and how to access funds,
  - Capacity-building services that are available,
  - Licences and contracts,
  - Copyright conditions;
- Guidelines and other support mechanisms on different methods of acquiring learning resources, such as transfer, adaptation, re-versioning, and a range of collaboration methods; and, in due course,
- Access to open content resources developed by selected centres of innovation.

3. *Mechanisms for centres of innovation to access funds.*

Funding arrangements that currently prevail often inhibit institutions from sharing and using each other's resources. When institutions are locked in competition with each other for student numbers, their willingness to cooperate in initiatives that they perceive as compromising their income base is diminished. Some mechanisms for consideration are:

- Identification of areas of national need where learning resources would be necessary, and provision of funds for materials development in these areas.
- Making available a specific source of funding for centres of innovation to put forward proposals for development of learning resources. Funding would be granted on the merit of proposals, which would be assessed by a specially appointed team.
- Recognition of learning resources as teaching outputs, and reward of institutions for their development and production.

4. The development of guidelines for the production of quality learning resources.

The present processes of quality promotion should be strengthened by providing a specific learning resources focus. A framework of guidelines would provide the direction necessary for institutions to begin to transform practices that are counterproductive and costly, and to embark on collaborative learning resource development practices that will result in quality resources where economies of scale can offer economic benefits in the long term.

Chapter Seven proposes that the Ministry of Education establish a specialist task team to further investigate the feasibility of the approach proposed with respect to learning resources, and support and review pilot initiatives prior to expanded implementation.

Learning centres

This aspect of policy deliberation around distance education was not officially part of the remit of the CHE advice. However a number of the stakeholders' presentations to the CHE Task Team motivated for a coordinated approach to learning centres.

Note was made of the large number of centres currently in operation around the country. Some 200 were indicated by the 2003 SAUVCA Occasional Paper, *Learning Delivery Models in Higher Education in South Africa*, of which the dedicated distance education institution reportedly accounted for 43. The notion of a 'centre' is no doubt open to many interpretations, as it clearly covers a range from sophisticated regional centres, such as the dedicated distance education institutions have in most provincial capitals, to a classroom rented in a school for weekends. A thorough exploration is therefore needed.

SAUVCA proposes that

> All public HEIs should be guided through incentives towards developing strong cooperation in establishing shared, properly staffed, well-equipped, well-maintained, properly managed, and jointly financed Higher Education Learning Centres. These HE Learning Centres should provide effective administrative and logistical support, sites for the delivery of ODL programmes with effective teacher-student interaction (such as audio-visual and computer assisted support), access to on-line library services, and PCs (possibly with broad-band connections) and other reliable communication facilities, available to all public HEIs. (SAUVCA, 2003)

It is suggested that a task team be established which involves SAUVCA and Committee of Technikon Principals (CTP) in investigating mechanisms and procedures for the establishment of national public higher education learning centres and suggests that the investigation should cover exploring potential partnerships with other Departmental initiatives establishing multi-purpose centres.

However, it is suggested that the new dedicated distance education institution should play a key role in coordinating the functionality of the higher education network, on the grounds that this institution will remain the dominant player in distance education in the foreseeable future. Moreover, the new dedicated distance education institution will have additional commitment to such a network, given the emerging quality criteria and the increasing requirement of computer literacy for graduates in the 21st century. Clearly, coordination would require close consultation with other institutions so that their needs as well as those of the dedicated institution shape the nature and operation of the network.

Conclusion

The White Paper of 1997 commits South Africa to a system of higher education that promotes equity of access and a fair chance of success, that meets national development needs (including those for high-level person power), that supports a democratic ethos and a culture of human rights, and that contributes to the advancement of knowledge.

This investigation demonstrates the crucial contribution of distance education to such a system, especially with regard to affording lifelong learning opportunities to working students, to students from disadvantaged communities, to adults and especially women, to people with disabilities, and to those living in more remote areas.

This contribution could be greatly enhanced should a network of learning centres for the higher education system be developed.

However, the nature and scale of the potential contribution of distance education will be seriously undermined if the concerns about quality that were identified by the research across the different types of institutions, especially in large-scale programmes, are not tackled and resolved.

Simultaneously, initiatives to provide innovative and high quality distance education should be facilitated and adequately resourced.

Finally, virtual centres of innovation in course design can assure that expertise is widely shared in ways that are conducive to critical discourse, creative thinking, and the advancement of knowledge.

LIST OF STAKEHOLDER INSTITUTIONS AND ORGANISATIONS THAT MADE ORAL PRESENTATIONS AND WRITTEN SUBMISSIONS TO THE CHE TASK TEAM

KOPANONG HOTEL AND CONFERENCE CENTRE, BENONI 12 – 14 MAY 2003

Stakeholder Institution /Organisation	Oral Presentation Made By:
1. Alliance of Private Providers in Education Training and Development (APPETD)	Prof. Zak Nel
2. Cape Technikon	Mr I. Smit
3. Durban Institute of Technology (DIT)	Ms Mari Pete
4. National Tertiary Education Staff Union (NTESU)	Mr David Knox
5. National Union of Tertiary Employees of South Africa (NUTESA)	Ms Thelma Louw
6. Rand Afrikaans University (RAU)	Prof. Desiré Voster
7. Rhodes University	Prof. George Euvrard
8. SATSU	Mr Tembile Yako
9. South African Universities' Vice Chancellors' Association (SAUVCA)	Prof. Wally Morrow
10. University of Stellenbosch	Prof. Tobie de Coning
11. Trechnikon Pretoria	Dr Herman van der Merwe
12. Technikon Southern Africa (TSA)	Prof. Narend Baijnath
13. University of Cape Town (UCT)	Ms Laura Czerniewicz
14. University of Fort Hare (UFH)	Ms Elizabeth Botha
15. University of the Free State (UFS)	Prof. Magda Fourie
16. University of Natal (UN)	Prof. HD Schreiner
17. University of Port Elizabeth (UPE)	Prof. Conrad van der Westhuizen
18. University of Zululand	Prof. Patrick Sibaya
19. University of Pretoria (UP)	Dr Hendrikz & Prof. Antony Melk
20. University of the Western Cape (UWC)	Prof. Zelda Groener
21. University of the Witwatersrand (WITS)	Prof. Penny Enslin
22. Potchefstroom University	Prof. Lou Van Wyk
23. University of South Africa (UNISA)	Prof. CF Swanepoel
24. Higher Education Quality Committee (HEQC)	Dr Prem Naidoo
In addition, Mr Ahmed Essop of the Department of Education (DoE), made an oral presentation	

LIST OF PARTICIPANTS IN THE LEARNING RESOURCES WORKSHOP

CHE PPROJECT: THE ROLE OF DISTANCE EDUCATION IN THE SOUTH AFRICAN HIGHER EDUCATION SYSTEM

Strategies for collaborating on learning resources
Reference group participants

This is the full list of participants for the workshop on 30 May. It also includes the small team members who will be participating in the workshop on 29 May.

Small team members for workshop on 29 May			
Name	**Institution/organisation**	**E-mail**	**Tel**
1. John Aitchison	Natal University Adult Education	aitchisonj@nu.ac.za	(033) 260-5070/ 5592
2. Benny Anderson	FNB Training Unit Business/ Commerce	banderson@fnb.co.za	(011) 352-4082
3. Carol Bertram	Teacher Education University of Natal Pietermarizburg	bertramC@nu.ac.za	(033) 260 5349
4. Liz Botha	Teacher Education Fort Hare, Eastern Cape	lizbotha@iafrica.com	(040) 639-3082
5. Nonthanthle Cele	TSA	ncele@tsa.ac.za	(011) 471 3144
6. Laura Czerniewicz	UCT	LCZ@ched.uct.ac.za	(021) 650 5036 083 459 9526
7. Michelle Doyle	FNB Training Unit Business/ Commerce	mdoyle@fnb.co.za	(011) 352-4082
8. Liebe Kellen	Programme Manager Open Supported Learning Programme, Wits	liebe@gecko.biol.wits.ac.za	(011) 717 6466 082 346 2880
9. Sizakele Magubane	Manager, Collaboration Office, Technikon SA	smaguban@tsa.ac.za	(011) 471 3562
10. E.O. Mashile	NADEOSA	mashieo@unisa.ac.za	(012) 429-4879
11. Thabi Molete	Centre for Courseware Design and Development, Technikon SA	tmolete@tsa.ac.za	(011) 471 3140
12. Wally Morrow	UPE	morrow@netactive.co.za	(041) 583-1120
13. Ana Naidoo	PE Technikon	anaidoo@petech.ac.za	(041) 402 6501
14. Rob O'Donoghue	Rhodes University Environmental Education Unit	greenbike@futurenet.co.za	083 212 1670
15. Rachel Prinsloo	NQF Project Coordinator Technikon SA	rprinslo@tsa.ac.za	(011) 471 3938
16. Francis Ralenala	Teacher Education, University of the North	ralenalam@unorth.ac.za	(015) 268-2398
17. Martsie Roman	Unisa Distance Education	romanmf@unisa.ac.za	(012) 429 6096
18. Mohamed Sader	Natal University School of Education	saderM@nu.ac.za	(033) 260 6265

Name	Institution/organization	E-mail	Tel
19. Saajidha Sader	Natal University School of Education	saderS@nu.ac.za	(033 260 6148
20. Carola Steinberg	Education Department Wits	steinbergc@educ.wits.ac.za	(011) 717 3056
21. Paul Steyn	Academic Director EDUCOR	pauls@educor.co.za	082 882 7976
22. Carol Thomson	Natal University School of Education	thomsonC@nu.ac.za	(033) 260 5567
23. Louis van Niekerk	Education Faculty, Unisa	vnieklj@unisa.ac.za	(012) 429-4099 082 789 7153
SAIDE TEAM			
24. Maryla Bialobrzeska	Education Specialist	marylab@saide.org.za	(011) 403-2813
25. Jenny Glennie	Director SAIDE	jennyg@saide.org.za	(011) 403-2813
26. Christine Randell	Consultant with SAIDE	chrstnr@global.co.za	(011) 787 0879
27. Neil Butcher	Planning and Information Coordinator	neilshel@icon.co.za	083 603 7773
28. Tessa Welch	Coordinator: Teacher Education and Quality Assurance	tessaw@saide.org.za	(011) 403-2813
29. Hanlie Griesel (Member of the small team but unable to participate in workshops on 29 and 30 May)	SAUVCA (ESATI) Teacher Education		(012) 481 2844 (012) 481 2842

PROGRAMME FOR THE WORKSHOP ON STRATEGIES FOR COLLABORATING ON LEARNING RESOURCES

WORKING TOWARDS DEVELOPING STRATEGIES FOR COLLABORATING ON LEARNING RESOURCES

Workshop with the small team facilitated by the SAIDE Team

Date 29 May, 2003
Venue Hofmeyr House, University of the Witwatersrand, Johannesburg

Aims

- Share ideas on using learning resources and examine the implications for collaboration.
- Reflect on international and local practice and brainstorm other possibilities for collaborating on learning resources.
- Develop feasible strategies that would harness the best expertise in the country to develop high quality learning resources for widespread use in the higher education sector in South Africa.

Key questions

By the end of the workshop, we will have developed a shared understanding of possible answers to the following questions:

1. What are the different ways in which people are making use of learning resources?
2. How many ways are there of collaborating?
3. What are the particular challenges of online collaboration?
4. Why would institutions be interested in collaborating?

Expected deliverables

1. Key issues that emerge from the discussions that would feed into the CHE report.
2. A set of draft strategies for collaborating on learning resources.
3. An action plan that details the tasks around the further development of identified strategies for collaboration.
4. A refined workshop programme for 30 May with the larger reference group.

Pre-workshop preparation

We have prepared a resource pack that offers pertinent information about collaborating on learning resources. The pack comprises:

- Background information reflecting current thinking on collaboration.
- Narratives of a range of international and local examples of collaboration.
- An overview of different types of collaboration strategies.

Our aim with the pre-workshop resource pack is to give the members of the small team an opportunity to come to the workshop well prepared so that we can focus our attention on designing appropriate draft strategies.

WORKSHOP PROGRAMME

29 May – Preparing draft strategies

When	What	How	Who
09h00 – 0945	**1. Introduction and overview of the CHE project and workshop**	Warm up activity: Introductions ' Why do you think that sharing learning resources is important?' Brief overview of the CHE Research Project Overview of the workshop	Jenny Jenny Christine
09h45 – 10h30	**2. Initial ideas about how people are using learning resources** Purpose: to tease out a range of different ways in which learning materials are used. This has implications for collaborating on developing resources.	**Inputs** Three short inputs providing examples to trigger ideas from the group. **Plenary group discussion** Participants share their own examples and we draw up a list of pertinent issues that emerge from the discussion.	Louis Maryla Christine Christine
10h30 – 11h00	*Tea break*		
11h00 – 12h00	**3. Examples of strategies of collaboration and the use of technologies** Purpose: to reflect on diverse examples from international and local experience. The focus of the input on technologies is: 'What are the new opportunities created by the latest technologies for the collaborative development of learning resources?'	**Presentations** Two examples of collaboration are presented (20 min each): • Environmental Education Network • The Study of Education A presentation on the use of technologies (20 minutes)	Rob Tessa Neil
12h00 – 13h00	**4. Reflect on examples of collaboration and identify key issues** Purpose: to draw out the key issues that should be considered when collaborating on the development of learning resources.	**Plenary discussion** Participants take a critical look at the range of collaboration examples they are familiar with and we draw out the underlying issues.	Christine
13h00 - 13h45	*Lunch*		

When	What	How	Who
13h45 – 15h00	**5. Develop draft strategies for collaboration that might work in the South African context** Purpose: to draw on own experiences and new insights gained in order to design some draft strategies that might be considered for use in the South African context.	**Small group activity** Two small groups work together to create diagrammatic representations of collaboration strategies. Each group tries to prepare at least two different strategies.	Christine
15h00 - 15h15	*Tea break*		
15h15 – 16h00	**6. A first look at the strategies developed** Purpose: to give the groups an opportunity to present the strategies they developed. These strategies will be refined at the workshop on 30 May by the reference group members.	**Group presentations in plenary** Each group presents the strategies they developed. After each presentation there is time for 'clarification' type questions. We note any emerging issues.	Louis
16h00 – 16h15	**7. Next steps** Purpose: to discuss the small group's role in the workshop on 30 May and beyond.	**Plenary discussion** We identify who and how the draft strategies will be presented at the workshop. We also discuss how the small group members might contribute to the process that follows the workshop.	Christine
16h15	*Closure*		

WORKING TOWARDS DEVELOPING STRATEGIES FOR COLLABORATING ON LEARNING RESOURCES

Workshop with the reference group facilitated by the SAIDE Team

Date 30 May, 2003
Venue Hofmeyr House, University of the Witwatersrand, Johannesburg

Aims

- Share ideas on using and sharing learning resources and examine the implications for collaboration.
- Reflect on a set of strategies developed by the small team on 29 May that would harness the best expertise in the country to develop high quality learning resources for widespread use in the higher education sector in South Africa.
- Provide suggestions for refining the strategies presented and offer ideas for other strategies that could be considered.

Key questions

By the end of the workshop, we will have developed a shared understanding of possible answers to the following questions:

5. What are the different ways in which people are making use of learning resources?
6. How many ways are there of collaborating?
7. What are the particular challenges of online collaboration?
8. Why would institutions be interested in collaborating?

Expected deliverables

5. Key issues that emerge from the discussions that would feed into the CHE report.
6. Suggestions to refine the draft strategies for collaborating on learning resources.

Pre-workshop preparation

We have prepared a resource pack that offers pertinent information about collaborating on learning resources. The pack comprises:

- Background information reflecting current thinking on collaboration.
- Narratives of a range of international and local examples of collaboration.
- An overview of different types of collaboration strategies.

Our aim with the pre-workshop resource pack is to give the reference group members some background information so that we can focus our attention in the workshop on refining the strategies that have been designed by the small team on 29 May.

WORKSHOP PROGRAMME

30 May – A critical look at possible strategies

When	What	How	Who
09h00 – 09h30	**8. Introduction and overview of the CHE project and workshop**	Introductions Brief overview of the CHE Research Project Overview of the workshop	Jenny Jenny Christine
09h30 – 10h00	**9. Initial ideas about how people are using learning resources** Purpose: to generate some more ideas about the different ways in which learning materials are used. It is also an opportunity to provide a link with the work done on the previous day.	**Input** A short summary of the ideas generated during the previous day is presented. Participants are encouraged to add their own ideas.	Maryla Christine
10h00 – 10h40	**10. Presentation of draft strategies for collaborating on the development of learning resources (Part One)** Purpose: to familiarise the reference group with the draft strategies prepared by the small group on the previous day.	Presentations Two of the strategies are presented. Each presentation including questions for clarification is 20 minutes.	Members of the small group
10h40 – 11h00	*Tea break*		
11h00 – 11h40	11. Presentation of draft strategies for collaborating on the development of learning resources (Part Two) Purpose: to familiarise the reference group with the draft strategies prepared by the small group on the previous day.	Presentations The other strategies are presented. Each presentation including questions for clarification is 20 minutes.	Members of the small group
11h40 – 13h00	**12. A critical look at the strategies presented** Purpose: to reflect critically on the strategies and to note emerging issues such as: • Copyright and intellectual property • Factors that create an enabling environment for collaborations.	Plenary discussion Participants reflect critically on the strategies and respond to the following questions: • What examples could work in the SA situation? *(Yellow hat)* • What are the challenges that we need to overcome to make them work? *(Black hat)* We note but do not discuss in-depth the emerging issues.	Louis

When	What	How	How
13h00 - 13h40	*Lunch*		
13h40 – 14h30	**13. Make suggestions for amending the strategies** Purpose: to suggest ways of improving the draft strategies or provide ideas for new strategies.	**Small group activity** Participants work in 4 small groups. Each group is responsible for refining one of the strategies. The groups interrogate the strategy and make suggestions for improving it or provide an alternative strategy. The groups prepare a report back of their suggestions either on overhead transparencies or flipchart paper.	Christine
14h30 – 15h00	**14. Present suggestions for refining the strategies (Part One)**	**Plenary report back** Two groups share their suggestions. We note any ideas that emerge from the groups' presentations.	Louis
15h00 - 15h15	*Tea break*		
15h15 – 15h45	**15. Present suggestions for refining the strategies (Part Two)**	**Plenary report back** Two other groups share their suggestions. We note any ideas that emerge from the groups' presentations.	Louis
15h45 – 16h00	**16. Next steps** Purpose: to provide participants with an overview of what will happen next and how they might be able to participate.	**Plenary discussion** We note any suggestions about the follow-up process and who might be able to be involved and how.	Christine
16h00	*Closure*		

LIST OF RESEARCH INSTRUMENTS

1. CHE Stakeholder Presentations 13–14 May 2003: Guidelines for Institutions
2. CHE Stakeholder Presentations 13–14 May 2003: Guidelines for Organisations
3. Case Studies: Institutional Questionnaire
4. Case Studies: Learning Programme and Course/Module Questionnaire
5. Case Studies: Course Pass Rate and Programme Throughput Questionnaire
6. Case Studies: Course Materials and Assessment Review Instrument
7. Case Studies: SAIDE Financial Planning Course Questionnaire
8. Case Studies: Student Focus Group Questionnaire
9. Proposed Models for Sharing Learning Resources: Questions to Guide the Description of Examples of Collaboration

LIST OF BACKGROUND PAPERS PRODUCED IN THE COURSE OF THE CHE INVESTIGATION INTO DISTANCE EDUCATION

Various papers were produced in the course of the investigation. These can be found at htt://www.che.ac.za

Background Paper 1
A Study of Distance Education Public Policy and Practice in the Higher Education Sectors of Selected Countries: Synthesis of Key Findings.

Background Paper 2
An Overview and Analysis of Policy for Distance Education in South African Higher Education: Roles Identified for Distance Education and Developments in the Arena from 1948.

Background Paper 3
Costing Summary of Ten South African Case Studies.

Background Paper 4a
Criteria for Quality Distance Education in South Africa – 2003.

Background Paper 4b
Minimum Targets for Distance Education in South Africa – 2003.

Background Paper 4c
Provider Readiness to Offer Programmes Using Distance Education and/or Electronic Learning Methods.

LIST OF SOURCE DOCUMENTS DEVELOPED FOR THE CHE INVESTIGATION INTO DISTANCE EDUCATION

Source Document 1a

Ten Case Studies of Distance Education Provision in the South African Higher Education System

Source Document 1b

- Examples of Collaborative Learning Resource Development
- Case Study Reports of Six Selected Countries
- Research Instruments

Source Document 2

Stakeholder Submissions to the CHE Task Team

SELECT BIBLIOGRAPHY

African National Congress (1994). *A Policy Framework of Education and Training*. Education Dept, African National Congress. January 1993.

African Virtual University: http://www.avu.org/

Armstrong, Steve, Thompson, Gail and Brown, Sally (eds) (1997). *Facing up to Radical Changes in Universities and Colleges*. London: Kogan Page.

Association for the Development of Education in Africa (ADEA) (2002). *Open and Distance Learning in Sub-Saharan Africa: A Literature Survey of Policy and Practice*. Mauritius and France: ADEA Working Group on Distance Education and Open Learning.

Barajas, Mario (2002). Restructuring Higher Education Institutions in Europe: The Case of Virtual Learning Environments. *International Educational Media*, No.5, October 2002, pp.1–28. http://www.ub.es/multimedia/iem/ (Accessed 19/03/2003).

Barker, K. (2002). *Canadian Recommended e-Learning Guidelines*. Vancouver: FuturEd and Canadian Association for Community Education.

Bates, A.W. (1995). *Technology, Open Learning and Distance Education*. London: Routledge.

Bates, A.W. (1997). Technology, Distance Education and National Development. Presentation at the 18th ICDE World Conference, Pre-conference Workshop *Distance Education and National Development: Research Perspectives*. Pennsylvania: ACSDE/World Bank. http://www.saide.org.za/colonline/resources/web1/18th%20ICDE%20World%20Conference.htm (Accessed 05/06/2003).

Baty, Phil (2003). QAA Warning Over Degree Shortcuts. *Times Higher Education Supplement*, 29 August 2003.

Boucher, M. (1973). *Spes in Arduis: A History of the University of South Africa*. Pretoria: University of South Africa.

British Columbia Open University: http://www.bcou.ca/home.html

Brown, S. and Smith, B. (eds) (1996). *Resource-Based Learning*. London: Kogan Page.

Butcher, Neil (2003). *Developing Standards for Sharing Online Content in South African Education: Discussion Document Prepared for the Western Cape Department of Education*. Johannesburg: SAIDE.

Butcher, Neil and Roberts, Nicky (In press for 2004). Costs, Effectiveness, Efficiency: A Guide for Sound Investment. In: Perraton, Hilary and Lentell, Helen (eds), *Policy for Open and Distance Learning,* London and New York: Routledge Falmer and The Commonwealth of Learning.

Canadian Association for Community Education (2002). *Consumers' Guide to e-Learning*. http://www.futured.com (Accessed 17/10/2004).

Candy, P., Crebert, G. and O'Leary, J. (1994). *Developing Lifelong Learners through Undergraduate Education*. National Board of Employment, Education and Training Commissioned Report No. 28, Canberra: Department of Employment, Education, Training and Youth Affairs/ Australian Government Publishing Service.

Cole, Robert A. (ed.) (2000). *Issues in Web-based Pedagogy: A Critical Primer*. London: Greenwood Press.

Commission of the European Communities (2002). *Proposal for a Decision of the European Parliament and of the Council Adopting a Multi-Annual Programme (2004–2006) for the Effective Integration of Information and Communication Technologies (ICT) in Education and Training Systems in Europe (e-Learning Programme)*. Brussels: The Commission. http://europa.eu.int/comm/education/elearning/doc/dec_en.pdf (Accessed 14/05/2003).

Commonwealth of Australia. Department of Employment, Education, Training and Youth Affairs (1998). *Learning for Life: Final Report. Review of Higher Education Financing and Policy*. Canberra: DEETYA.

Commonwealth of Learning (1992). *Distance Education in Single and Dual Mode Universities*. Vancouver: Commonwealth of Learning.

Commonwealth of Learning (1999). An Overview of Open and Distance Learning. In: Commonwealth of Learning and South African Institute for Distance Education (2001) *Supporting Distance Education through Policy Development: Resources*. http://www.saide.org.za/colonline/resourcehome.htm (Accessed 6/05/2003). (Note: Case studies give good examples of different institutional forms in higher education.)

Commonwealth of Learning (2000). *Introduction to Open and Distance Learning*. Vancouver: Commonwealth of Learning. http://www.col.org/odlintro/ODL%20Intro.pdf (Accessed 06/05/2003).

Cornford, J. and Pollock, N. (2002). *Putting the University Online: Information, Technology and Organisational Change*. Buckingham: Society for Research in Higher Education/ Open University Press.

Council on Higher Education (2000). *Towards a New Higher Education Landscape: Meeting the Equity, Quality and Social Development Imperatives of South Africa in the 21st Century*. Pretoria: CHE.

Council on Higher Education, Higher Education Quality Committee (March 2003). *Proposed Criteria for the HEQC's First Cycle of Audits: 2004–2009.*

Council on Higher Education, Higher Education Quality Committee (July 2003). *Proposed Criteria for the HEQC's Programme Accreditation Cycle: 2004–2009.*

Council on Higher Education, Higher Education Quality Committee (September 2003). *Proposed Criteria for the HEQC's Programme Accreditation Cycle: 2004–2009.*

Cunningham, Stuart, Tapsall, Suellen, Ryan, Yoni and Stedman, Lawrence (1997). *New Media and Borderless Education: A Review of the Convergence between Global Media Networks and Higher Education Provision*. Canberrra: Department of Employment, Education, Training and Youth Affairs.

Daniel, J.S. (1996) *Mega-Universities and Knowledge Media: Technology Strategies for Higher Education*. London: Kogan Page.

Daniel, J.S. (1995). *Open Universities and the Knowledge Media: New Opportunities: New Threats*. Conference Paper delivered at IXth Annual Conference of the Asian Association of Open Universities, 3–5 December 1995, Taipei, Taiwan.

De Boer, Harry, Huisman, Jeroen, Klemperer, Anne and Van der Meulen, Barend (2002). *Academia in the 21*st *Century: An Analysis of Trends and Perspectives in Higher Education and Research*. The Hague: Centre for Higher Education Policy Studies.

Department of Education and Science (UK) (1981). *Average Recurrent Unit Costs of the Open University and Conventional Universities*. Confidential and Restricted Paper.

Department of Education (1996). *A Distance Education Quality Standards Framework for South Africa: Discussion Document Prepared by the Directorate for Education, Media and Technological Services*. Pretoria: Department of Education.

Department of Education (1997). White Paper 3: *A Programme for the Transformation of Higher Education,* Government Gazette. Vol. 386 No. 18207, 15 August 1997.

Department of Education (1998). *Criteria for Quality Distance Education in South Africa: Draft Policy Statement*. Pretoria: Centre for Educational Technology and Distance Education, Department of Education.

Department of Education (2001). *National Plan for Higher Education*. Government Gazette, Vol. 429 No. 22138, 9 March 2001.

Department of Education (2002). *A New Academic Policy for Programmes and Qualifications in Higher Education*.

Department of Education (2003). *Education Statistics in South Africa at a Glance in 2001*. Pretoria: Department of Education.

Department of Education (2003). *HEMIS Circular 3, May 2003*, Pretoria: Department of Education.

Department of Education (August 2003). *Draft White Paper on e-Education: Transforming Learning and Teaching through Information and Communication Technologies (ICTs)*. Pretoria: DoE.

Department of National Education (1992). E*ducation Renewal Strategy: Management Solutions for Education in South Africa*. Pretoria: Department of National Education.

Dhanarajan, G., Ip, P.K., Yuen, K.S. and Swales, C. (eds) (1994). *Economics of Distance Education: Recent Experience*. Hong Kong: Open Learning Institute Press.

Dhanarajan, Gajaraj (2001). Distance Education: Promise, Performance and Potential. *Open Learning: Journal of Open and Distance Learning*, Vol. 16 No. 1, pp. 61–68.

Dodds, Tony, Nonyongo, Evelyn and Glennie, Jenny (1999). Co-operation Competition or Dominance: A Challenge in Southern Africa In: Harry, Keith (ed) *Higher Education through Open and Distance Learning*. London: Routledge/Commonwealth of Learning.

Dorrell, J. (1993). *Resource-based Learning*. London: McGraw Hill.

Eaton, Judith S. (2001). *Distance Learning: Academic and Political Challenges for Higher Education Accreditation*. Council for Higher Education Accreditation Monograph Series 2001, No. 1. Washington DC: Council for Higher Education Accreditation. http://www.chea.org/Commentary/distance-learning/chea_dis_learning.pdf (Accessed 07/05/2003).

eDegree: http://www.edegree.co.za/

E-Learning Advisory Group (2002). *Highways and Pathways: Exploring New Zealand's e-Learning Opportunities*. New Zealand: Ministry of Education.

Evans, Terry and Nation, Daryl (1993). *Reforming Open and Distance Education: Critical Reflections from Practice.* London: Kogan Page.

Evans, Terry and Nation, Daryl (eds) (1996). *Opening Education: Policies and Practices from Open and Distance Education.* London: Routledge.

Farrell, Glen M (1999). *Development of Virtual Education: A Global Perspective.* Vancouver: Commonwealth of Learning.

Farrell, Glen M (ed.) (2001). *Changing Face of Virtual Education*, Vancouver: Commonwealth of Learning. http://www.col.org/VIRTUALED/ (Accessed 06/03/2003).

Garrison, Randy (2000). Theoretical Challenges for Distance Education in the 21st Century: Shift from Structural to Transactional Issues. *International Review of Research in Open and Distance Learning,* Vol. 1 No. 1, June 2000. http://www.irrodl.org/content/v1.1/randy.pdf (Accessed 19/03/2003).

Glennie, Jennifer (2001). Funding Public Distance Education. Presentation to the 3rd Conference of the National Association of Distance Education Organisations of South Africa. http://www.saide.org.za/nadeosa/conference2001/JAGs%20presentation%20for%20the%20NADEOSA%20conference%20Aug%202001.pdf (Accessed 06/05/2003).

Government of National Unity (1995). *White Paper on Education and Training.* Government Gazette No. 16312. Cape Town, Parliament of the Republic of South Africa.

Hall, Martin (2001). Education and the Margins of the Network Society. In: Muller, Johan, Cloete, Nico and Badat, Shireen (eds) *Challenges of Globalisation: South African Debates with Manuel Castells.* Cape Town: Maskew Miller Longman.

Harley, G.S. (1992). Position Paper: Distance Education: Higher Education South African Institute for Distance Education Launching Conference, 7–9 September 1992. Johannesburg: SAIDE.

Harry, Keith (ed.) (1999). *Higher Education through Open and Distance Learning,* London: Routledge/Commonwealth of Learning.

Hayton, Annette and Paczuska, Anna (2002). *Access, Participation and Higher Education: Policy and Practice.* London: Kogan Page.

Hillman, Josh (1996). *University for Industry: Creating a National Learning Network.* London: Institute for Public Policy Research.

Hodgson, Barbara (1993). *Key Terms and Issues in Open and Distance Learning*. London: Kogan Page.

Hong Kong. Non-Local Course Registry (1997). *Non-Local Higher and Professional Education (Regulation) Ordinance* (Cap.493). http://www.ncr.edu.hk/eng/welcome.asp. (Accessed 12/03/2003).

Horlock, J.H. (1984). The Open University After 15 Years. *Proceedings of the Manchester Statistical Society*.

Hudson, Rachel, Maslin-Prothero, Sian and Oates, Lyn (1997). *Flexible Learning in Action: Case Studies in Higher Education*. London: Kogan Page.

Hulsmann, Thomas (2000). *Costs of Open Learning, A Handbook*. Cambridge: International Research Foundation for Open Learning/Carl von Ossietzky Universität Oldeburg.

Human Sciences Research Council (2003). *Human Resource Development Review*. Cape Town: HSRC Press and East Lansing, Michigan: Michigan University Press.

Indiana Partnership for Statewide Education. Discussion Paper about Full Formula Funding for Distance Education Students. Indiannapolis: Indian Higher Education Telecommunication System. http://www.ihets.org/consortium/ipse/whitepapers/9afullformfund.html (Accessed 08/05/2003).

Keegan, D.J. (1986). *The Foundations of Distance Education*. London: Croom Helm.

Keegan, Desmond (1994). *Otto Peters on Distance Education: The Industrialisation of Teaching and Learning*. London: Routledge.

Kelly, Mavis and Kember, David (1992). Government Policy and Institutional Practice in Tertiary Distance Education: A Hong Kong Case Study. In: *CADE: Journal of Distance Education*. http://www.saide.org.za/colonline/resources/web/Tertiary%20Distance%20Education.htm (Accessed 06/05/2003).

King, Bruce (2003). *Has Distance Education a Future?* Keynote Presentation: 10th Cambridge International Conference on Open and Distance Education. 23–26 September 2003.

King, Bruce (2001). Managing the Changing Nature of Distance and Open Education at an Institutional Level. *Open Learning: Journal of Open and Distance Learning*, Vol. 16 No. 1, 2001, pp. 47–60.

King, Bruce (2003). *Quality Assurance and the Role of the Teacher in a Digital World*. Keynote address at 'Online Learning in a Digital World: Post Secondary and Higher Education', a conference organised by the Far Eastern College in Chiang Mai and the Office of the National Commission for Education (ONEC) of Thailand from 15–18 January 2003. http://www.fareastern.ac.th/conference/docs/King.doc (Accessed 17/10/2003).

Kinyanjui, P.E. (2000). Future Trends in Open and Distance Education. *Huria – Journal of the Open University of Tanzania,* Vol. 3 No. 1, September 2000 pp.1–10.

Laurillard, Diana (2002). *Re-thinking University Teaching: A Conversational Framework for the Effective Use of Technology*. London: Routledge Falmer.

LearnDirect: http://www.learndirect.co.uk/

Lockwood, Fred (ed) (1995). *Open and Distance Learning Today.* London: Routledge.

Manjulika, S. and Venugopal Redd, V. (1996). *Distance Education in India: A Model for Developing Countries.* New Dehli: Vikas Publishing House (Pvt) Ltd.

Massachusetts Institute of Technology: http://www.mit.edu

McKinnon, K.R., Walker, S.H., and Davis, D. (2000). *Benchmarking: A Manual for Australian Universities.* Canberra: Commonwealth of Australia, Higher Education Division, Department of Education, Training and Youth Affairs.

Middlehurst, Robin (N.D.) *Quality Assurance and Accreditation for Virtual Education: A Discussion of Models and Needs.* United Kingdom: Centre for Policy and Change in Higher Education, University of Surrey.

Moore, D. (2001). From Correspondence to Flexible Learning: Thoughts on Educational and Institutional Change at Techikon SA. *Rectorate Occasional Papers*, No. 1 (1993–1998), Florida: Technikon SA.

Moore, M.G. and Kearsley, G. (1996). *Distance Education: A Systems View.* Belmont: Wadsworth Publishing Company.

Moore, Michael G. and Lambert, Kris Ho (1996). *Motives for Collaborating in International Higher Education.* Pennsylvania, American Center for Study of Distance Education. http://www. cde.psu.edu/DE/ACSDE/ACSD.htm (Accessed 22/06/04).

Moran, Louise and Mugridge, Ian (1993). *Collaboration in Distance Education: International Case Studies.* London: Routledge.

Moran, Louise and Myringer, Brittmarie (1999). Flexible Learning and University Change. In: Harry, Keith (ed.) *Higher Education through Open and Distance Education*. London: Routledge/Commonwealth of Learning.

Mugridge, I. (1989). The Language of Distance and Open Learning. *Journal of Distance Education*, Vol. 4 No. 2, pp. 83–85.

Mugridge, Ian (1994). *Funding of Open Universities*. Vancouver: Commonwealth of Learning.

Murphy, Paud, Anzalone, Steve, Bosch, Andrea and Moulton, Jeanne (2002). *Enhancing Learning Opportunities in Africa: Distance Education and Information and Communication Technologies for Learning*. Washington DC: World Bank.

National Board of Employment, Education and Training (NBEET) (1994). *Costs and Quality in Resource-Based Learning On- and Off-Campus,* Commissioned Report no. 33. Canberra: NBEET.

National Association of Distance Education Organisations of South Africa (2001). *Code of Ethics*. http://www.nadeosa.org.za.

National Commission on Higher Education (NCHE) (1996). *NCHE Report: A Framework for Transformation*. Pretoria: NCHE.

New Zealand Universities Academic Audit Unit (1999). *External Quality Assurance for the Virtual Institute*. AAU Series on Quality, No. 4.

Ortner, Gerhard E. and Nickolmann, Friedhelm (1999). *Socio-Economics of Virtual Universities: Experiences from Open and Distance Higher Education in Europe*. Weinheim, Beltz Deutscher Studien Verlag. (Review: International Review of Research in Open and Distance Learning, October 2002).

Parrish, Debra M and Parrish, Alexander Wills (2000). *Developing Distance Education Policy for 21st Century Learning*. Division of Government Public Affairs, American Council for Education. http://www.acenet.edu/washington/distance_ed/2000/03march/distance_ed. html. (Accessed 08/03/2003).

Perraton, H. (1994). Comparative Cost of Distance Teaching in Higher Education: Scale and Quality. In: G. Dhanarajan, Ip, P.K, Yuen, K.S. and Swales, C. (eds), *Economics of Distance Education: Recent Experience*. Hong Kong: Open Learning Institute Press.

Perraton, H. (2000). *Open and Distance Learning in the Developing World*. London: Routledge.

Philippines. Commission on Higher Education (2000). *Updated Policies and Guidelines on Open Learning and Distance Education*. http://www.ched.gov.ph/policies/ (Accessed 12/03/2003).

Open Learning Agency Australia: http://www.ola.edu.au/

Open Learning Agency Canada: http://www.ola.bc.ca/

Open University (UK) Digital Enhancement Project. http://www.uhollands.gn.apc.org/deep/about/about.html

Open University (UK) Quality Support Centre (1999). *Strategic Study on Legislation, Accreditation, Recognition and Quality Assurance Applied to Open and Distance Learning in Central and Eastern Europe: Report and Recommendations*. London: European Commission/Phare/European Training Foundation.

O'Rourke, Jennifer (1993). *Roles and Competencies in Distance Education*. Vancouver: Commonwealth of Learning.

PricewaterhouseCoopers (2000). *Business Model for the e-University*. Main Report available through www.hefce.ac.uk/pubs/HEFCE/2000/00_44htm (Accessed 08/05/2003).

Quality Assurance Agency for Higher Education (2003). *Guidelines of the Quality Assurance of Distance Learning*. Gloucester: QAA. http://www.qaa.ac.uk/public/dlg/dlg_textonly.htm (Accessed 17/10/2003).

Ramanujam, P.R. (2001). *Distance Open Learning in the Developing Asian Countries: Problems and Possible Solutions*. ZIFF Papiere 117. Hagen: Zentrales Institut für Fernstudienforschung.

Raschke, C.A. (2002). *Digital Revolution and the Coming of the Postmodern University*. London: Routledge.

Regional Accrediting Commissions (2001). *Guidelines for the Evaluation of Electronically Offered Degree and Certificate Programmes*. http://www.wiche.edu/telecom/

Robins, Kevin and Webster, Frank (2002). *The Virtual University? Knowledge, Markets, and Management*. London: Oxford University Press.

Rossman, Parker (2002). *Future of Higher (Lifelong) Education: For All Worldwide, a Holistic View* (Work in progress available online at: http://ecolecon.missouri.edu/globalresearch/index.html)

Rowntree, D. (1992). *Exploring Open and Distance Learning*. London: Kogan Page.

Rumble, Greville (1989). Open Learning, Distance Learning, and the Misuse of Language. *Open Learning: Journal of Open and Distance Learning*, June 1989, pp. 28–36.

Rumble, Greville (1994). Mixed Modes of Teaching and Learning: Structures, Resources, and Developments. In: Thorpe, Mary, *Open Learning in the Mainstream*. London: Longman.

Rumble, Greville (1997). *Costs and Economics of Open and Distance Learning*. London: Kogan Page.

Rumble, Greville (2001). *Analysing Costs/Benefits for Distance Education Programmes*. Commonwealth of Learning Knowledge Series. Vancouver: Commonwealth of Learning. http://www.col.org/Knowledge/pdf/ks_costs.pdf (Accessed 06/05/2003).

Saint, W. (1999). *Tertiary Distance Education and Technology in Sub-Saharan Africa*. Washington DC: World Bank.

Shale, Douglas (1999). University disance Education in Canada. In: Harry, Keith (ed.) *Higher Education through Open and Distance Learning*. London: Routledge/Commonwealth of Learning.

Smith, A. and Webster, F. (1997). *The Postmodern University? Contested Visions of Higher Education in Society*. Buckingham: SRHE/Open University Press.

Smith, Jennifer (2003). The End of an Academic Generation: Facing the Retirement Boom in Higher Education. *The Bulletin*, No. 155, May 2003. London: Association of Commonwealth Universities.

Smith, Peter and Kelly, Mavis (1987). *Distance Education and the Mainstream: Convergence in Education*. London: Croom Helm.

SOFF: The Norwegian Agency for Flexible Learning in Higher Education (2001). *SOFF and the National Distance Education Network in Higher Education- An Introduction:* Tromsø: SOFF. http://www.soff.uit.no/eng-info.htm (Accessed 08/05/2003).

South African Institute for Distance Education (1993). *Opportunities for Innovations in Higher Education: Workshop and Conference of Vice-Chancellors and Rectors in South African Higher Education*. Johannesburg: SAIDE.

South African Institute for Distance Education (1995). *Open Learning and Distance Education in South Africa*. Manzini: Macmillan.

South African Institute for Distance Education (1995). *Teacher Education Offered at a Distance in South Africa: Report for the National Audit (Apr–Nov 1995).* Johannesburg: SAIDE.

South African Institute for Distance Education (1997). *Higher Education Policy: An Open Learning Perspective* Johannesburg: SAIDE.

South African Institute for Distance Education (2000). *Distance Education at Traditionally Contact Higher Education Institutions.* Johannesburg: SAIDE.

South African Institute for Distance Education (2000). *Evaluation of Selected Centre for Higher Education Development (CHED) Projects: Report for the Multimedia Education Group at the University of Cape Town.* Johannesburg: SAIDE.

South African Institute for Distance Education (2000). *Information and Communication Technologies and South African Higher Education: Discussion Paper Prepared for the Council on Higher Education.* Johannesburg: SAIDE.

South African Institute for Distance Education (2000). *Open Learning in South African General and Further Education and Training.* Johannesburg: SAIDE.

South African Institute for Distance Education (2001). *'Think Fast, Read Deep': A Formative Evaluation of the Masters Degree in Early Childhood Intervention for the Centre for Augmentative and Alternative Communication, University of Pretoria.* Johannesburg: SAIDE.

South African Institute for Distance Education (2003). *What is a Learning-Centred Learning Centre? Key Questions for Distance Education.* Johannesburg: SAIDE.

South African Institute for Distance Education (2003). *Conceptual Analysis of Distance Education.* Draft document prepared for the Higher Education Quality Committee (HEQC). Johannesburg: SAIDE.

South African Universities Vice-Chancellors' Association (June 2001). *A Code of Conduct for Public/Private Partnerships in Higher Education.* Pretoria: SAUVCA.

South African Universities Vice-Chancellors' Association (SAUVCA) (2003). *Learning Delivery Models in Higher Education in South Africa*, 30 July 2003.

Strydom, J.F. (1997). *Counselling Needs of Students in a Resource-based Learning Programme.* MA Dissertation, Faculty of Arts, University of the Orange Free State.

Swift, D.F. (1992). Distance Education and Open Learning. In: South African Institute for Distance Education *Launching Conference of the South African Institute for Distance Education*. Johannesburg: SAIDE.

Swift, D.F. (1992). *Distance Education: Two Modes of Learning Separated by a Common Language.* Pre-Publication Copy.

Swift, D.F. (1996). *A Conceptual Analysis of the Costs of Distance Education.* SAIDE Concept Paper, unpublished, Johannesburg: SAIDE.

Swift, D.F. and Dhanarajan, G (1992). *Cost-Effective Distance Education: A Hong Kong Strategy.* (Unpublished) Hong Kong.

Tait, Alan and Mills, Roger (1999). *Convergence of Distance and Conventional Education: Patterns of Flexibility for the Individual Learner.* London: Routledge.

Taylor, J.C. (2001). Fifth Generation Distance Education. *Higher Education Series* Report No. 40, June 2001. Canberra: Department of Education, Training and Youth Affairs, Higher Education Division.

Taylor, J.C. and White, V.J. (1991). *The Evaluation of Cost Effectiveness of Multi-Media Mixed-Mode Teaching and Learning.* Canberra: Australian Government Publishing Service.

Thorpe, M (2003). *Continual Reinvention: The Future for Open and Distance Learning.* Keynote Presentation: 10th Cambridge International Conference on Open and Distance Education, 23–26 September, 2003.

UKeU: http://www.ukeu.com/

Unesco (2000). *The Dakar Framework for Action – Education for All: Meeting our Collective Commitments.* Report from the World Education Forum held in Dakar, Senegal, 26–28 April 2000.

Unesco (2002). *Open and Distance Learning: Trends, Policy and Strategy Considerations.* Paris: Unesco. http://unesdoc.unesco.org/images/0012/001284/128463e.pdf (Accessed 07/05/2003).

University of South Africa (1993). *University of South Africa Pocket Statistics.* Pretoria: UNISA.

University of the Western Cape, Education Policy Unit and Society for Research in Higher Education (2001). G*lobalisation and Higher Education: Views from the South. Synopses*

of an International Conference 27–29 March 2001, Cape Town, South Africa. http://www.uwc.ac.za (Accessed 24/03/2003).

Universities UK (2001). *New Directions for University Funding: Funding Options Review Group Final Report.* London: UK.

Unwin, David (2003). *UkeU Web Communities: Assuring the Quality and Integrity of Programmes Offered by UkeU.*

Uvalic-Trumbic, Stamenka (ed.) (2002). *Globalisation and the Market in Higher Education. Quality, Accreditation and Qualifications.* Paris: Unesco Publishing/Economica, with the co-operation of the International Association of Universities.

Whitelock, Denise, Romano, Daniela, Jelfs, Anne and Bina, Paul (2000). Perfect Presence: What Does this Mean for the Design of Virtual Learning Environments? *Journal of Education and Information Technologies,* Vol. 5, December 2000.

World Bank (2002). *Constructing Knowledge Societies: New Challenges for Tertiary Education.* Washington DC: World Bank.

Worldwide University Network Quality Assurance Group (no date). *Good Practice Guide for Approval of Distributed Learning Programmes including e-Learning and Distance Education.*

Zang, Wi-Yuan and Shin, Namin (2002). Imported or Indigenous? A Comparative Study of Three Open and Distance Education Models in Mainland China, India and Hong Kong. *Open Learning: Journal of Open and Distance Learning,* Vol. 17 No. 2, pp.167–176.