



COUNCIL ON HIGHER EDUCATION

POLICY ADVICE REPORT

Advice to the Minister of Education on Aspects of Distance Education Provision in South African Higher Education

15 March 2004

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Foreword

Higher education worldwide has been subjected to fundamental changes during the past decade and a half. The advent of the knowledge and information and communication technology revolution has led to the introduction of new technologies, modes of delivery and new teaching methods at higher education institutions across the globe. The use of the Internet and the proliferation of “e-degrees” has increased the array of higher education offerings considerably. Several authors internationally contend that these developments have created a “blurring of traditional face-to-face teaching and distance education in the higher education system”. Some writers predict a fundamental change to the higher education landscape in the next two decades. On the one hand these developments signal new opportunities for working students, people living in rural areas, the poor and women to study and to develop skills in the context of rapid globalization. These changes equally threaten to marginalize the very same individuals and communities, as without Internet access they are likely to be marginalized into what is already being termed the “fourth world”.

Developments in South African higher education have closely mirrored international trends. In addition to the well-established distance education provision offered by the dedicated distance education institutions, a number of face-to-face institutions have also ventured into distance education in recent years. These developments have certainly increased access to higher education for many people who have previously been denied these opportunities. However, this growth in provision also raises a number of questions around the quality of both programmes and learning resources. Further questions regarding the cost-effectiveness of these programmes, the roles that the dedicated institution (the new University of South Africa) should play vis-à-vis the face-to-face institutions, and the conditions and criteria that should govern the provision of distance education in South Africa also needed to be examined. The Minister of Education therefore requested the CHE to advise the Ministry on these and other matters regarding distance education in South Africa.

The CHE appointed a Task Team of a number of experienced South African and international experts and specialists in the field of distance education to spearhead its investigation. The South African Institute for Distance Education (SAIDE) and a number of others were commissioned to undertake supportive research. A very thorough process was followed. It included various background papers, stakeholder submissions to the CHE and a set of case study investigations into distance education programmes offered by South African higher education institutions. The CHE investigation also comprised research on international distance education provision in comparable countries, proposals on assuring quality in distance education, proposals on funding distance education and a seminar in Cambridge, England, with a range of international experts on distance education to coincide with a biennial conference on distance education organized by the Commonwealth of Learning and the United Kingdom Open University.

This *Policy Advice Report*, and an accompanying *Research Report* that is published separately, shed new light on the current field of distance education in South Africa. The findings include *inter alia* that distance education forms a very significant proportion of higher education provision; the dedicated institutions are currently the major providers of distance education; the pattern of distance provision is very different from national targets; there is little evidence of any large scale convergence to the middle on the continuum of contact and distance education; within the continuum there is a clear role for the new dedicated distance institution, and that there are some innovative and quality distance programmes to be found at traditional face-to-face institutions. Some of these may be useful models for assisting institutions in rural regions to reach students in remote areas. At the same time, various concerns are raised regarding aspects of distance education provision in South Africa.

Detailed recommendations are made in this *Policy Advice Report* regarding the funding of distance education, strategies for quality assurance, institutional planning and the development of quality learning resources in order to ensure quality distance programme offerings.

We trust that these recommendations will assist distance education to meet the vision and objectives as set out in the 1997 White Paper: to improve equity and fair access to all who are seeking to improve their potential through higher education; to meet national development needs such as the high skilled employment needs presented by a developing economy within the global context; to contribute to the advancement of all forms of knowledge and scholarship; to address the diverse problems and demands of the local, national, southern African and African contexts, and to uphold rigorous standards of academic quality.

The CHE wishes to thank the following people and institutions for their dedication to and support of the project:

- Members of the CHE Task Team for their guidance, wisdom and keen involvement and participation in various aspects of the CHE investigation. We are particularly indebted to Dr Gajaraj Dhanarajan (President of the Commonwealth of Learning) who attended a workshop discussion and shared with us his valuable comments and insights.
- SAIDE for its research, report writing support and management of some aspects of the CHE investigation
- Various researchers for their production of background papers and undertaking of case studies
- Prof Saleem Badat, the CEO of the CHE who supervised the CHE investigation
- Ms. Chantal Dwyer, who served as Project Administrator of the CHE Task Team
- The staff of higher education institutions and associations for their submissions to the Task Team. Their contributions and cooperation facilitated and enriched the investigation.
- Ms Nasima Badsha and her staff at the Department of Education for their willingness to provide us with their views and information.
- The Ford Foundation for providing the bulk of the funding for the CHE investigation
- The United Kingdom Department for International Development for supporting the seminar in Cambridge, England, and all the international colleagues that participated in the Cambridge conference

On behalf of the CHE

Prof. Stef Coetzee
Chairperson of the CHE Task Team on Distance Education

Abbreviations and Acronyms Used

ANC	African National Congress
CHE	Council on Higher Education
CTP	Committee of Technikon Principals
DoE	Department of Education
FTE	Full-time equivalent
GATS	General Agreement on Trade and Services
HE	Higher Education
HEI	Higher Education Institution
HEMIS	Higher Education Management Information System
HEQC	Higher Education Quality Committee
ICT	Information and Communication Technology
IT	Information Technology
MoE	Ministry of Education
NADEOSA	National Association of Distance Education Organizations in South Africa
NCHE	National Commission on Higher Education
NPHE	National Plan for Higher Education
NRF	National Research Foundation
NSFAS	National Student Financial Aid Scheme
ODL	Open and Distance Learning
UK OU	Open University of the United Kingdom
PC	Personal Computer
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-Chancellor's Association
SETA	Sector Education and Training Authority
TSA	Technikon Southern Africa
UNISA	University of South Africa
VUDEC	Vista University Distance Education Campus

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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, p.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 became clear 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 these requests by conceptualizing and implementing an investigation to this end. This *Policy Advice Report* presents the CHE's advice to the Minister, which is provided following extensive investigation and research and 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 categorized.

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 decentralized 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 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 concentrated on distance education in the public higher education sector as the issues on which the Minister requested advice pertained primarily to this sector.

Principles Underpinning the CHE Investigation and Advice

The CHE's 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 realize 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 contribute to realization of 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 with regard to 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;
- The quality of academic programmes, including teaching and research, is improved across the system.

The Project leading to this policy advice has been guided by key principles, articulated in the White Paper (DoE, 1997:1.17 to 1.25) that should guide the process of transformation and development in higher education. These are:

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

Undertaking of 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 document.

The Task Team members were as follows:

- CHE Members
 - Prof. Stef Coetzee
 - Ms Jenny 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, 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. A number of 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 ten key activities and processes were undertaken.

1. Background Paper

A background paper was commissioned to give an overview of distance education policy in higher education in South Africa. In addition, an analysis of current distance education provision was conducted using information from the Higher Education Management Information System (HEMIS).

2. 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 25 higher education institutions and related organizations presented submissions to the Task Team on 13 and 14 May 2003. The key findings and perspectives from the presentations and written submissions were then synthesized.

3. Case Studies

Ten case studies of distance education programmes or 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;
- 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 each case study as well as an analysis of findings has been prepared.

4. 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 synthesized.

5. 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 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;
- Provider readiness to offer programmes using distance education and /or electronic learning methods; and
- Minimum targets for distance education in South Africa.

6. 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.

7. 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, has informed our proposals.

8. Select Bibliography

In order to support the CHE investigation, a select bibliography on useful research resources was compiled. Literature was sought and 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.

9. Seminar with International Distance Education Specialists in Cambridge, England

The United Kingdom Department for International Development supported a seminar in Cambridge, England, to coincide with a biennial conference on distance education organized by the Commonwealth of Learning and the British Open University. The seminar was held on 26-28 September 2003 and 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.
- Identify issues and areas on which there was broad consensus on the conceptualizations, approaches, and proposals of the Task Team, as well as areas on which re-thinking, development and refinement was required.

10. Other Stakeholder Engagements Processes

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, their views on the nature and role of distance education provision and on the financing and funding of distance education.

Research Report

A major *Research Report* on distance education in South African higher education that draws on and synthesizes the research that was commissioned by the CHE Task Team during the course of its investigation will be published by the CHE shortly. The *Research Report* forms the basis for formulating the arguments, proposals and recommendations that are contained in this *Policy Advice Report*.

Distance Education Provision 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. Put differently, in 2001 distance education provision was responsible for about 286,000 out of 665,000 headcount enrolments. This represents a 75% increase in headcount participation on account of distance education.² Given that it is sometimes difficult to determine who is a distance student, 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.

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 a one of the worlds' 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.

From 1993, a number of traditionally face-to-face³ universities embarked on distance education. This was in alignment with the 1992 Educational Renewal Strategy of the apartheid state which emphasized 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 (DoE, 1992: 30).

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

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 These figures are taken from the 2001 HEMIS database as at 15 November 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.

³ For the purposes of this report, the term *face-to-face* and not contact is used to distinguish between the types of institutions at the two ends of the continuum. 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 e.g. telephone, e-mail etc.

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

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 of public distance provision. The recent Human Sciences Research Council's HRD Review (2003) analysed information from the DoE of 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. CHE information for 2003, provided by the HEQC Accreditation Directorate, 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 sector is currently of limited significance.

General Characteristics of Provision in 2001

It is useful to highlight various characteristics of distance education provision where distance education provision is defined as those students declared by their institution to be on distance education programmes. Such students can either be at the dedicated distance education institutions or in predominantly face-to-face institutions. 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 meaningful⁴.

The following general characteristics can be discerned. **Distance education in the public higher education sector 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 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 4:10 for distance education

Furthermore, distance education students at public institutions are:

- Largely over 23 years of age, but include a substantial number of students younger than 23;
- Predominantly African; and
- Mostly women at universities, and men at technikons.

Each of these characteristics is discussed in more detail below.

1. 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. Altogether, distance education FTEs at predominantly face-to-face universities constitute 10.96% of total FTEs at such institutions.

Table 1: Distance Education at Predominantly Face-to-Face Universities in 2001

Institution	Distance FTEs	Total FTEs	Distance FTEs as % of Total FTEs
1. University of Potchefstroom	5,219	16,228	32.1
2. University of Port Elizabeth	2,333	8,422	27.7
3. University of Fort Hare	1,468	5,493	26.7
4. University of Pretoria	6,084	30,786	19.8
5. Rand Afrikaans University	2,737	14,908	18.4
6. University of Natal	3,576	19,459	18.3
7. University of the Free State	1,129	11,140	10.1
8. University of Stellenbosch	992	16,264	6.1
9. Rhodes University	218	5,061	4.3
Other face-to-face universities	0	89,004	0.0
Total	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 with 5,476 FTEs and three others with 67 altogether had the remaining FTE enrolments. Altogether, distance education FTEs at predominantly face-to-face technikons constitute 4.74% of total FTEs at such institutions.

2. 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.

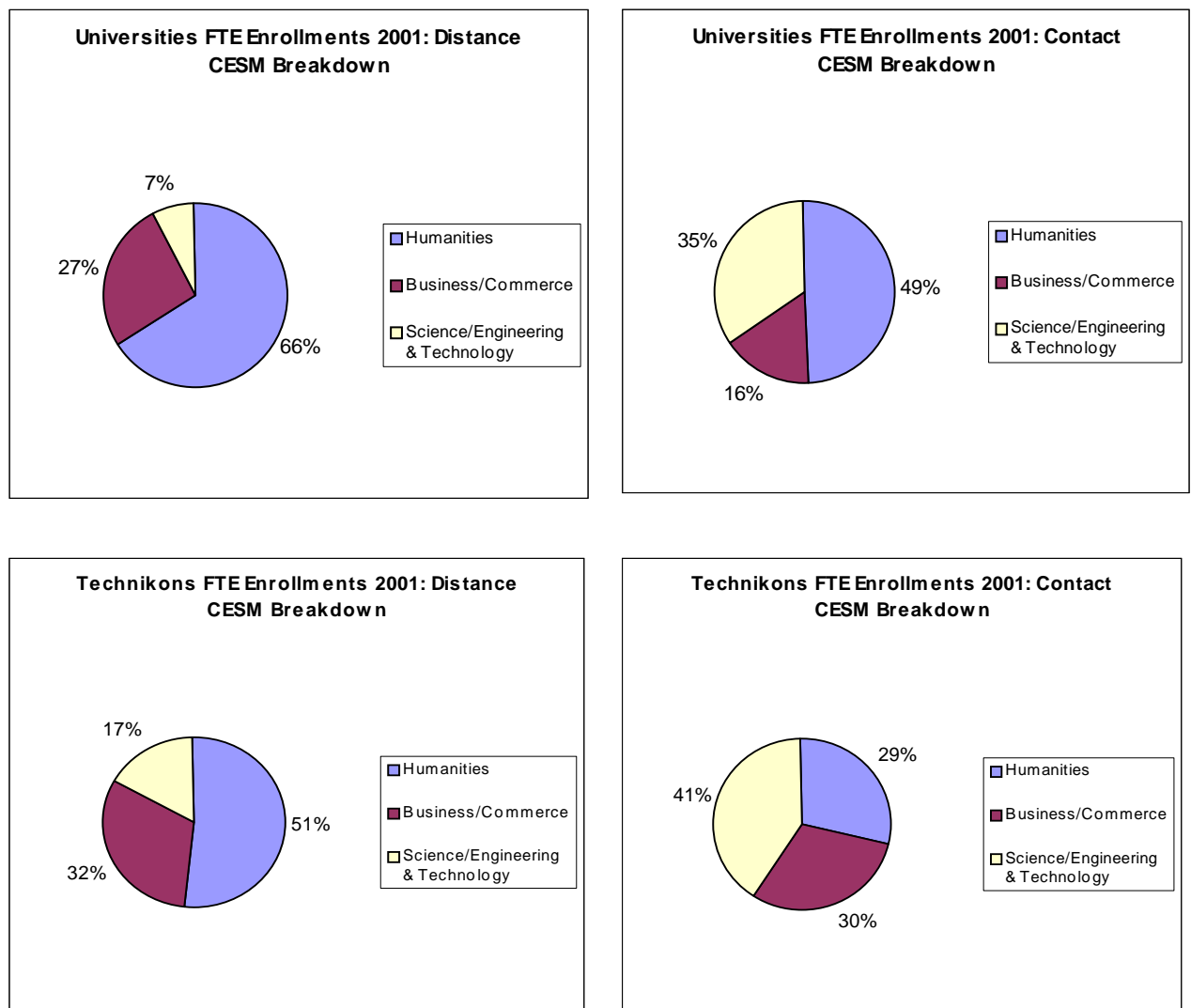
Table 2: FTE Enrolments in Different Fields of Study at Universities

Field	1999 Contact	2000 Contact	2001 Contact	1999 Distance	2000 Distance	2001 Distance
Science & 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%
Business & Commerce	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 01%	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 7,500 FTEs at universities (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 organize 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



Further breakdown of distance education provision shows that distance education provision in the dedicated distance institutions and the traditionally face-to-face 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 have increased markedly over the last few years.

3. 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

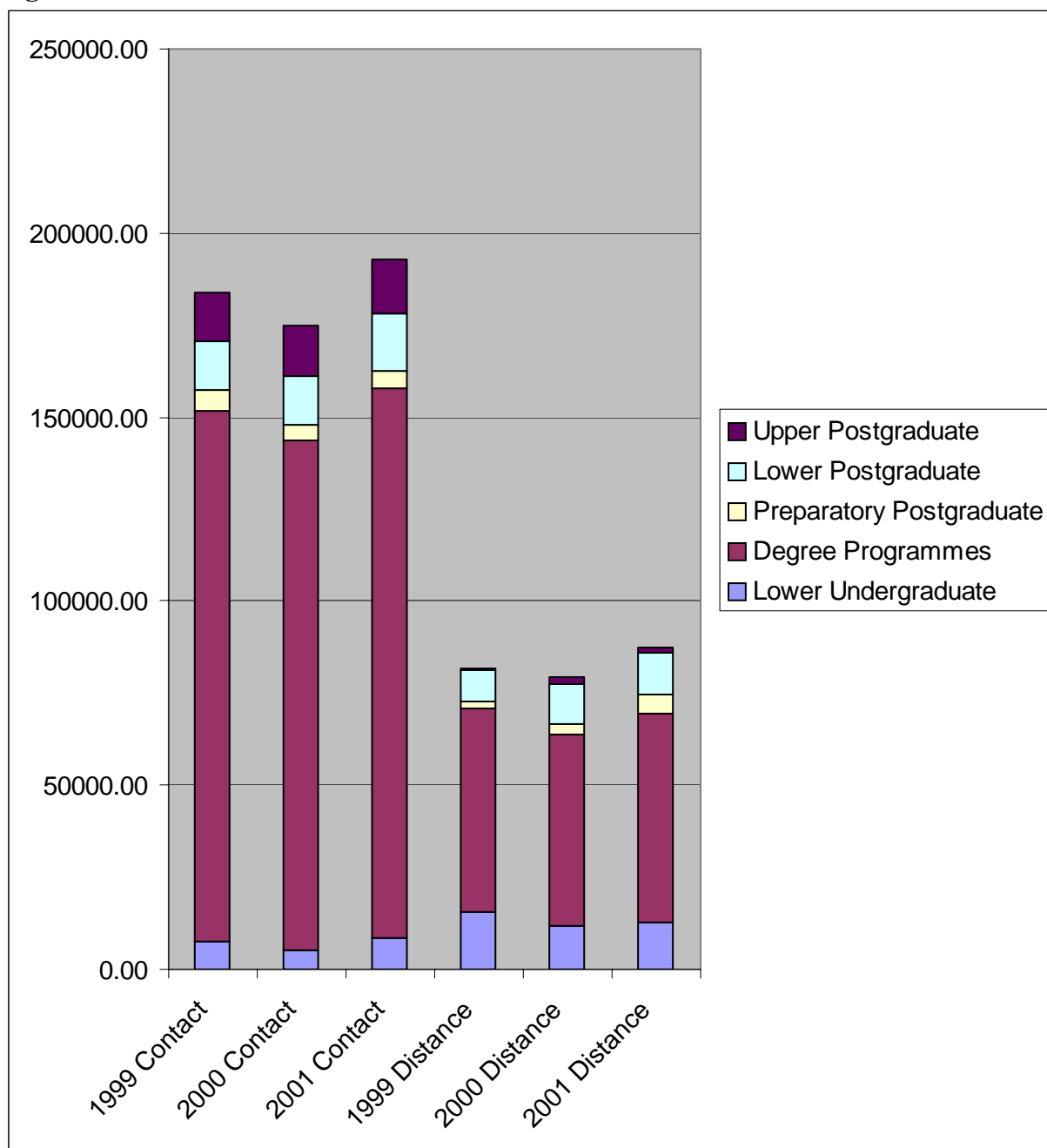
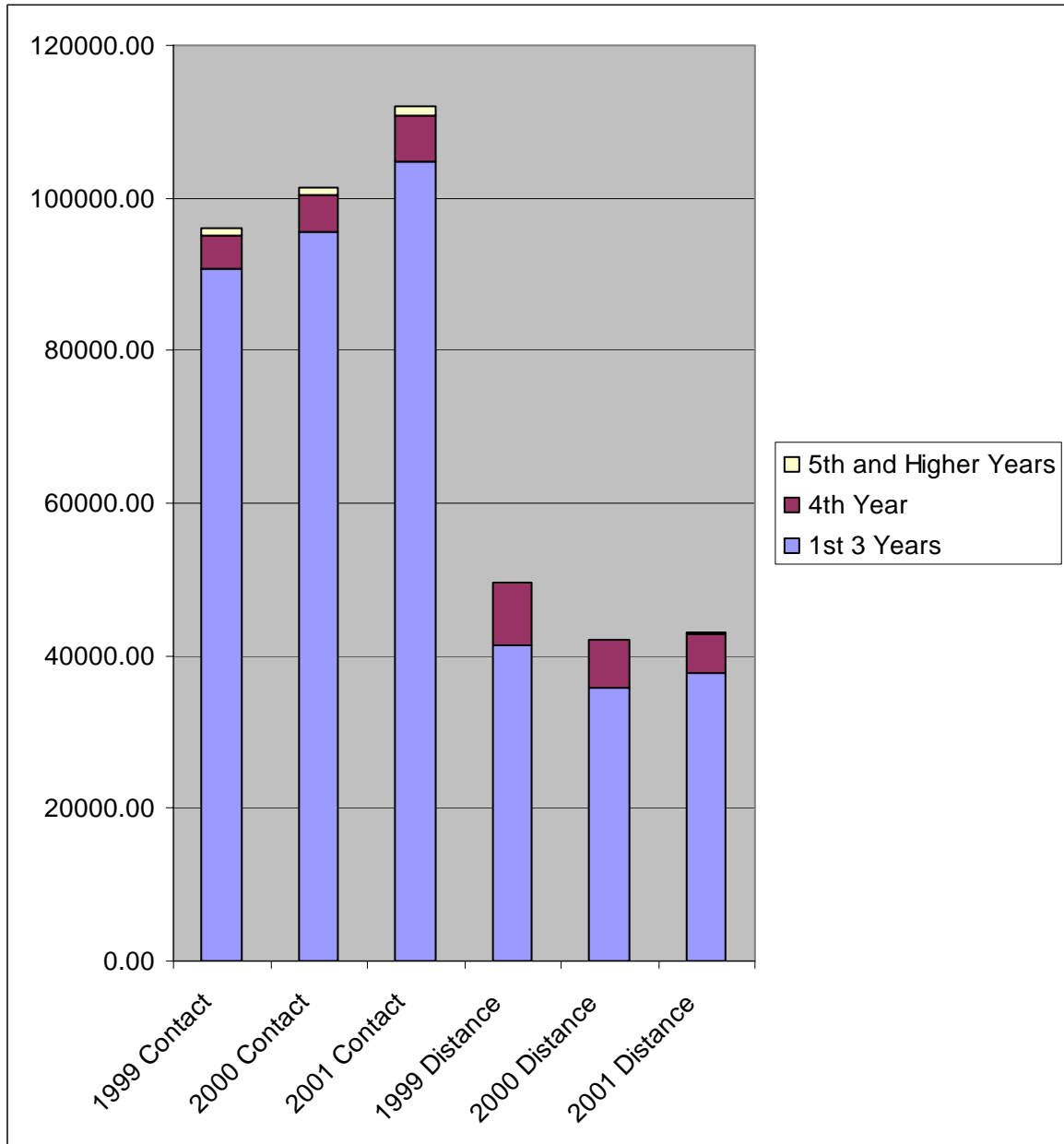


Figure 3 below shows that in 2001 at technikons, 87.44% of distance provision was at the first qualification level compared to 94% in face-to-face provision. A concomitant higher proportion in distance education is found at 4th year level (12.21% compared to 5.24% in 2001).

Figure 3: FTE Enrolments at Different Levels at Technikons



4. Social Profile of Distance Education Students

The social profile of distance education students differs markedly in a number of respects from that in face-to-face programmes. This is particularly so for the university sector. The most obvious difference is age. Figures 4 and 5 below show the stark contrast, with about 80% of headcount distance education enrolments at both universities and technikons being over 23, while at universities 61% and at technikons 79% of face-to-face headcount enrolments are under 23. The figures also show that there are large numbers of students involved in distance education who are under 23: some 36,000 in university programmes and some 16,700 in technikon programmes.

Figure 4: Age Profile of Headcount Students at Universities in 2001

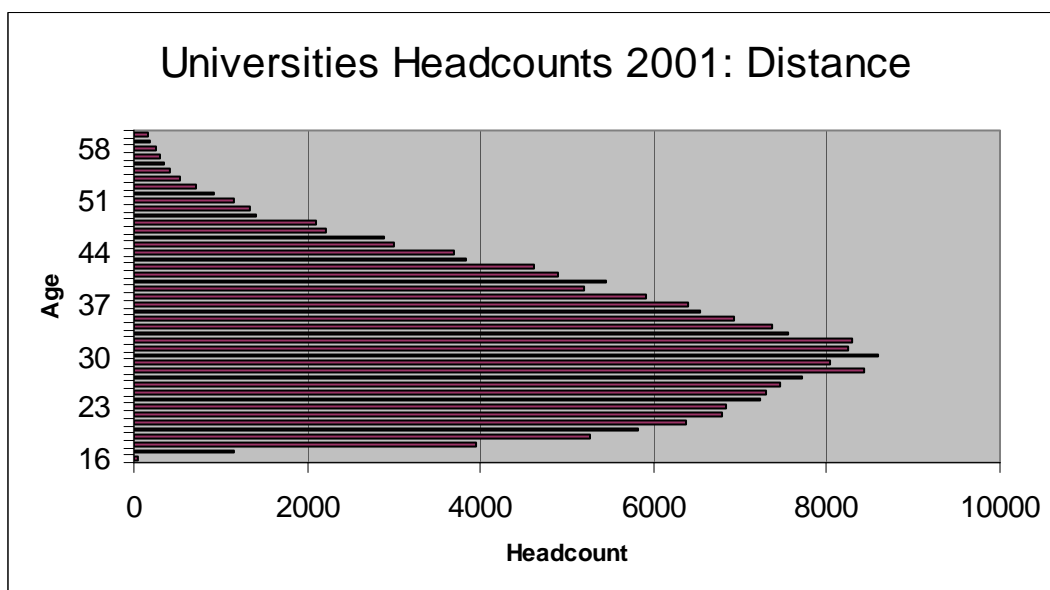
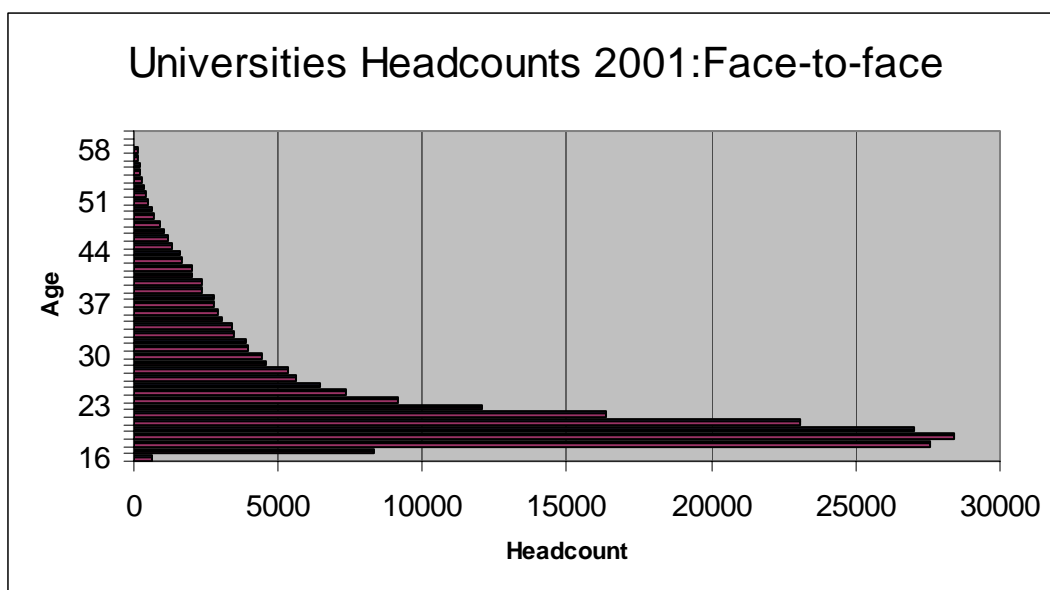
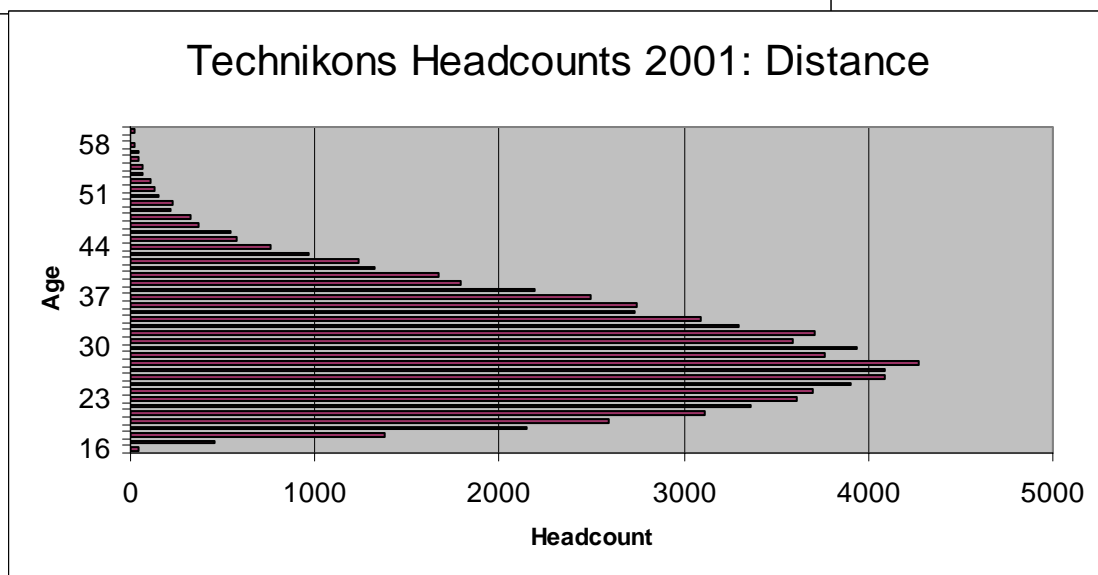
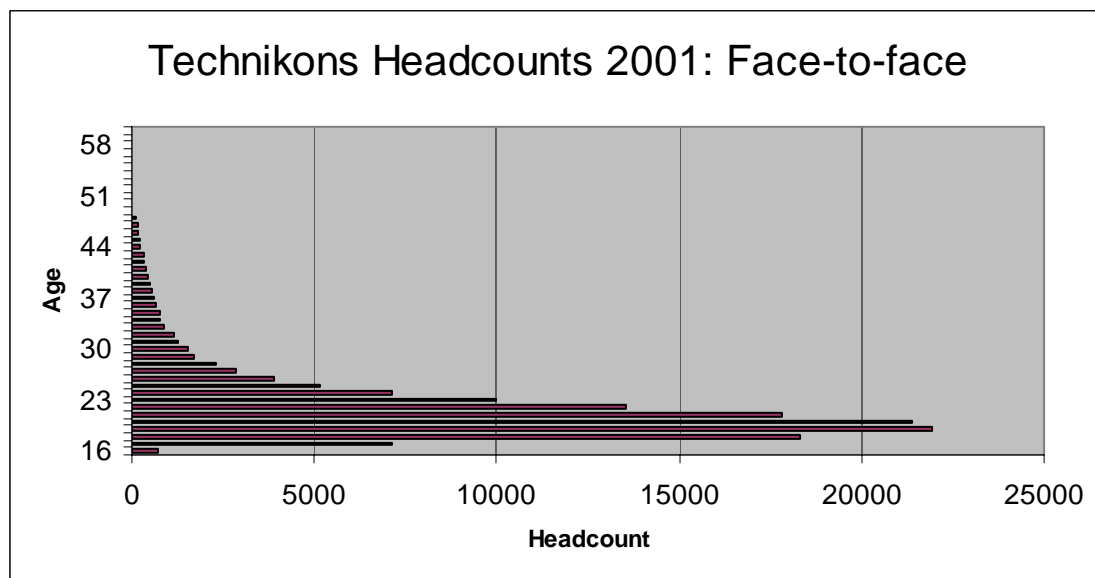


Figure 5: Age Profile of Headcount Students at Technikons in 2001



Breakdowns by ‘race’ show that, in 2001, 57% of FTE university enrolments in distance education were African compared to 47% for face-to-face. However, further examination of distance education students show that the percentage of African students at the dedicated distance education institution is only 49% compared to 80% in distance education at the predominantly face-to-face universities. From a different angle, about 35% of all African FTE, or 55% of all headcount, students at universities are in distance education programmes. In technikons, the percentages across modes are almost the same, with 76% of FTE enrolments in distance education being African compared to 74% for face-to-face.

With regard to gender, in 2001 61% of all distance education headcount students at universities were women, compared to 53% for face-to-face provision. At technikons the figures were 43% and 50% respectively.

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 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.

Each theme is elaborated on below.

Participation and Access

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

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 (DoE, 1995:28).

The National Commission on Higher Education (NCHE) Report of 1996 – as part of its policy proposals to ensure development of a well-planned, integrated, high quality system of higher education, to address unjust regularities and inefficiencies inherited from the apartheid era, and to respond to the new social cultural and economic demands – 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 contact universities and technikons should grow by 2.5% and 6% a year respectively, distance education should grow 5% and 8% a year respectively. It also emphasized 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 growing economic and other imperatives for flexible lifelong opportunities (DoE, 1996:6.4.5. /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, 1997:26).

Thus, it is clear that the new South African government clearly anticipated that there would be, and indeed sought to encourage, massification of the higher education system. This, together with international trends towards lifelong learning, resulted in high expectations 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 marginalized, the report has a separate outcome on 'broadening the social base of students', emphasizing in particular workers, mature learners, and the disabled (ibid: 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 cost-effectiveness of distance education in the NCHE report (DoE, 1996). It gave, as its reason for proposing to expand distance education more than 'contact' education, relatively lower 'cost per qualifier' in distance education institutions (DoE, 1996:95).

It expressed concern, however, 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 (ibid: 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 (ibid: 27).

The CHE *Towards a New Landscape* report (2000:44) noted that some distance education programmes were very small and hence did not achieve economies of scale achieved by large programmes. It urged collaboration across the sector, especially around the development of learning resources. The NPHE 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 1996 NCHE report 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 (DoE, 1996:122).

The idea was not pursued at all in the 1997 White Paper on Higher Education which rather proposed developing a coherent national framework for facilitating distance education and resource-based learning (DoE, 1997:27). The CHE's *Towards a New Higher Education Landscape* report, 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' (ibid: 45).

The Ministry of Education's subsequent 2001 *NPHE* 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 differently motivated challenges, it was unable to fulfil its mandate entirely. 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 emphasized 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 that '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' (DoE, 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 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) echoes 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).

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 was commissioned by the ANC and carried out by a team of experts⁵. It described 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 (Open Learning and Distance Education in South Africa, 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 (DoE, 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 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, modernize courseware, improve student support, and to undertake essential efficiency reforms and cost effective planning so that quality of provision and performance is improved’ (ibid: 27).

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 (SAIDE, 1995) 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* (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,

⁵ 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.

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’ (ibid: 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, May 2003: 5) before funding will be approved.

The above illustrates ongoing concern about 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 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 quality of education across the system (DoE, 1996:122). It then suggested that its proposed new single dedicated distance institution should coordinate the process via a consortium (ibid: 123).

The 1997 White Paper 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 *NPHE* re-emphasized 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’ (DoE, 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 strongly mooted by a number of stakeholders and specifically by SAUVCA. Further reference is therefore made to the establishment of a coordinated national network of learning centres in Section 8.

Conclusion

The key policy themes identified above remain salient, and will be taken up and developed in the course of this *Policy Advice Report*.

The Changing Nature of Distance Education in the Higher Education System

Introduction

Tackling the issue of the changing nature in distance education raises the question of what counts as ‘distance education’. In a recent paper, Mary Thorpe states that ‘the use of ICTs [Information and Communication Technologies] in all forms of education and training renders it more difficult than ever before, to distinguish the distance from the non-distance sector of provision’ (Thorpe, 2003:1). This is especially so when ICTs are being used by many face-to-face institutions.

Thorpe is, however, mindful of a range of social contexts, and cautions that both in developed and developing countries, the need is still for ‘the classic expertise of distance educators in delivering access and flexibility of learning opportunities’ (ibid: 2). By this is meant the use of appropriate systems and capabilities for effective delivery, particularly to adult learners, at a time and place of their choosing, irrespective of whether the environment is technologically rich or poor.

Bruce King underscores the same point in his paper *Has Distance Education a Future?* He cautions that, although many argue that ‘technology will transform our capacity to offer existing services in ways that they are more comprehensive, more immediate, and more directly responsive to demands of our students’ (King, 2003:1), inequalities between the technological haves and have-nots will increase. He also warns that ‘developments may well be driven by technologists and business interests, rather than educators’ (ibid: 2).

In summary, both Thorpe and King point to the fact that ICT, more than any other factor, is contributing to a perceived blurring of distinctions between distance education and predominantly face-to-face programme provision in higher education. Nevertheless, they both observe that the differences are still real and context-specific and caution that context and prevailing circumstances need to be carefully considered before determining the most appropriate delivery methods.

The Changing Nature of Distance Education

Given the South African context, the ‘classic expertise’ needed to offer flexible learning opportunities presents a range of challenges. A number of programmes/courses in the CHE investigation do indeed exemplify effective delivery appropriate to the context.

In examining the question of *how* distance education is delivered in the South African context, some emerging features can be mapped from the CHE Task Team investigation particularly from the case studies and from stakeholder submissions to the CHE. These serve to give texture to the nature of provision.

Programmes Using a Mix of Methods in Delivery

The most important feature to emerge was the rich variety of methods used. While all case studies conducted as part of the CHE Task Team investigation make primary use of a print-based delivery method, which is realistic as many students do not have access to all technologies, six also make use of some sort of ICT to enhance delivery. This includes two programmes that use satellite broadcasts, two that use video as a vehicle for presenting case studies to students for analysis, and two that use audio cassettes.

Some face-to-face institutions make particularly innovative use of different methods in their distance education delivery. Two programmes, both targeting rural students, have an excellent decentralized student support system in place and, in one instance, one-on-one support is offered in mother tongue.

A strong work-based focus was evident in the majority of programmes in the CHE investigation. Two programmes in particular offer pre-service training on an in-service basis. The mix of delivery methods includes use of work-based case studies, which students are required to research and present for analysis and discussion purposes. Work-based mentoring and an assessment system that complements the theoretical components delivered in the programme are also features of a number of programmes, as is a formative approach to assessment and use of portfolios to track student progress. The advantage of these programmes is that they have immediate relevance and application to the workplace.

Multi-Modal Delivery of Programmes

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 simultaneously. There was evidence of examples of multi-modal delivery in the CHE investigation that led to this report.

This practice serves to increase flexibility, thereby potentially opening access to higher education for more students, including access to postgraduate level qualifications. In one instance, a postgraduate programme offered in two modes (face-to-face on campus, part-time, and through distance education methods incorporating the use of satellite broadcasts) has doubled the number of student enrolments on the distance education programme. A second example, this time an undergraduate programme that is also offered in two modes (part-time with weekly contact sessions and in partnership with a private provider offering the programme online), has an enrolment of 145 on the part-time programme and an enrolment of approximately 400 on the online version. This work-based programme with a well developed recognition of prior learning system, specifically targets students who have not had the opportunity to enter higher education previously.

Collaboration in Programme Design and Delivery

Responsiveness to regional, national, and industry needs and collaboration on various aspects of programme design and delivery provide examples of the positive potential of distance education. This is illustrated by the fact some institutions had extensive stakeholder participation. Examples of participation ranged from collaboration with international higher education institutions and a range of local non-governmental organizations on programme design to involvement by provincial and national government departments in design and delivery processes and industry stakeholder input into mentoring, student assessment, and general programme evaluation.

Supporting Students in Rural Areas

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 focus on supporting students in select urban areas only. In the context of the limited number of CHE case studies, the face-to-face institutions certainly appeared to offer more comprehensive support to students in remote regions than the dedicated distance institutions. All the face-to-face institutions do, to a greater or lesser extent, offer the kind of support considered desirable in distance education and two in particular offer very extensive, decentralized support to students on their rural based programmes.

Quality Issues

Across the world, the quality of distance education varies enormously. On the positive side, the United Kingdom Open University was recently rated fifth in teaching quality across all UK universities in a *Sunday Times* league table. The league table drew on a number of assessments of teaching practices conducted by peers as part of the national quality assurance processes. By contrast, there are also many examples internationally of distance education where students are furnished with inaccessible texts and left to their own devices until they sit what is essentially a challenge examination.

In South Africa, analysis of the CHE case study data similarly reflects 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 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 of the CHE case studies demonstrated little or no evidence of requiring 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.

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- 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, that is learner centered, 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 decentralized 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, 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 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 that is delivered in partnership with a large parastatal.

A number of worrying features of distance education practice were observed in some case studies. These include:

- Little time being spent on materials development. International literature on this subject suggests that a minimum of ten 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 institutions in the CHE investigation did not allocate time dedicated to materials development. Academic staff members were expected to integrate this task into the rest of their work schedule. Not surprisingly, quality of learning materials was therefore uneven. Of particular concern were instances where ‘wrap-around’ study guides of dubious quality were used in conjunction with prescribed textbooks.
- Levels of exit outcomes are questionable in four of the programmes. Here, curriculum support materials are content-led, relying heavily on rote learning of facts, and, because this was combined with an absence of formative assessment in two instances, do not require or create opportunity for critical or analytical cognitive processes.

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- There is evidence of poor student support in many instances:
 - None of the four distance education programmes at the dedicated distance education institutions 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 organize the contact sessions. Attendance ranges between 10% and 20% across all four programmes.
 - On two of these programmes, assignments are also optional and feedback is provided in a generic memorandum/exemplar answer. A multiple-choice technique is applied. 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, or incentive for, students to participate in the programme as such.

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 appropriate data capturing and processing and retrieval systems. It also endorses a need for guidelines on provider readiness.

In the ten CHE case studies, the throughput rate of distance education programmes at the face-to-face institutions was considerably better than at the dedicated distance institutions. Further investigation is needed to establish any pattern. The success rates for distance education (defined as the ratio of FTE degree/diploma credits to FTE enrolments) are found in both the DoE (2003:45) *Education Statistics in South Africa at a Glance* and the HSRC's *HRD Review* (2003:374). The average success rates are 58% for distance education and 73% for face-to-face education. The distance education success rates are a cause of concern in the technikon sector (with an average of 30% for undergraduates in 2001), in Science, Technology and Engineering (with an average of 40% in 2000) and in five institutions (with undergraduate success rates of less than 45%).

Integration of ICT into Educational Programmes

There is clear growing interest in use of ICT, with ambitious plans in a few institutions to migrate all courses to online delivery. These are, however, still some way off from implementation. The research commissioned by the CHE Task Team reflected some overstatement of the extent of ICT integration into programme delivery. Equally, there is some worrying evidence regarding uncritical perspectives on use of ICT in education. Use of ICT in delivery of education programmes cannot be taken to be a *panacea* for all the ills, and will not produce quality education delivery *per se*. This sentiment was repeatedly expressed in stakeholder submissions, with seemingly little thought given to the underpinning principles of learning and teaching. Close attention needs to be paid to programme design and appropriate pedagogic strategies for quality delivery that integrates use of ICT.

Although the majority of programmes in the CHE investigation were advertised as using various forms of ICT as the method of delivery, with one exception, the research shows that ICT is in fact not used as a key method of delivering the programmes, but merely to enhance certain aspects of delivery, for example, interactive TV (satellite), audio-visual cassettes and teleconferencing are used in certain components of the programme. The only notable exception is the online delivery of one programme offered in partnership with a private provider. However, a concern was raised regarding the fact that the materials in this example had not been adapted for online delivery.

Of interest are instances where use of ICT has resulted in providers moving into distance education without consciously intending to do so (discussed below with regard to the notion of ‘slipping into distance education provision’). 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.

There were some voices of caution reflected in institutional submissions – and these views need to be integrated more strongly into the discourse around use of ICT in higher education. For example, one institution cautioned that new technologies often make it easy to create poor quality materials that look good. A number of institutions that participated in the case studies also raised a concern regarding student access to computers. 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, finding an answer to this question will become more urgent.

The Continuum of Education Provision

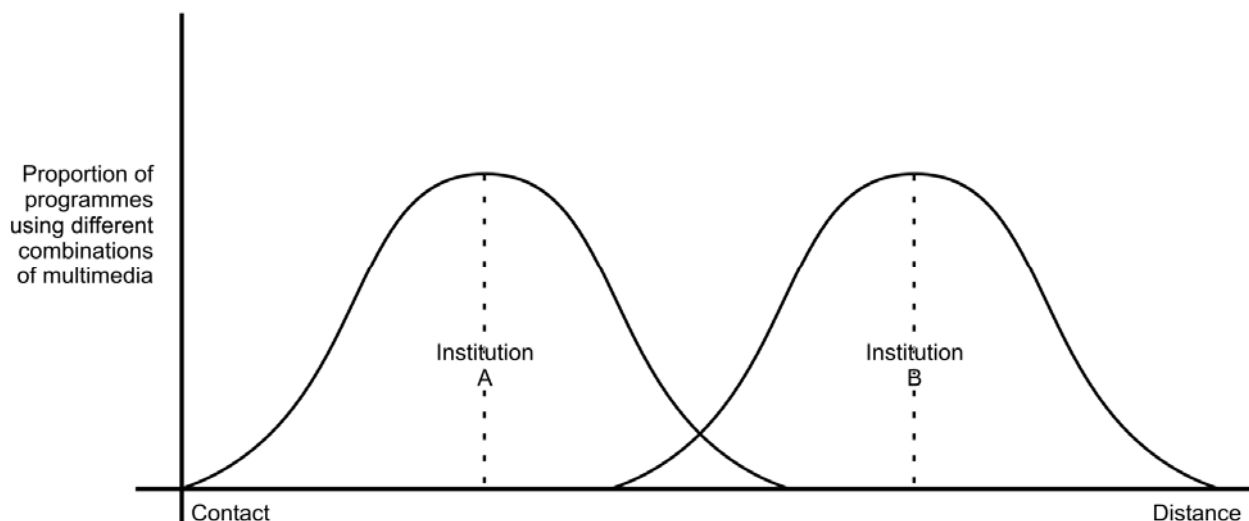
The CHE, in *Towards a New Higher Education Landscape* (2000:44), proposed that higher education exists on a continuum with two imaginary poles, one representing education offered purely at a distance and the other purely face-to-face. The reality is that all educational provision exists somewhere on this continuum, but cannot be placed strictly at either pole. The continuum of education provision can be used to describe a range of educational practice, 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 students 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 face-to-face 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 programme/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 6 below for two separate institutions, A and B. The horizontal axis shows the mix of methods used in programme design, moving from 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, most of A's programmes use predominantly face-to-face education methods, whereas most of B's programmes use predominantly distance education methods.

Figure 6: Overlap between Traditionally Face-to-Face and Dedicated Distance Institutions



Shifting Provision to the Centre?

Changing practices away from 'correspondence education' (based solely on delivery of paper materials without any structured interaction) to implementation of distance education in which provision of contact and interaction opportunities between educator and student are integrated into programme design, seems to have encouraged a number of institutions to argue that programme provision should be conceptualized 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 Task Team 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, as seen above, this played a secondary role. In the majority of cases, textbooks with wrap-around study guides and three to four tutorial letters per year are still the norm. While the face-to-face institutions in the CHE investigation were, overall, more innovative in offering tutorial sessions and supporting their students, the programmes offered by the dedicated distance institutions all only offer contact sessions on an optional basis. The emphasis in the programmes reviewed at the dedicated distance institutions is clearly on *independent-study*.

As has been confirmed from the research findings, the nature of programme provision in distance education in the current South African context is still distinctly clustered near the distance education pole of the continuum. Anecdotal evidence of face-to-face provision is 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 educational methods that characterized 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 student 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, both the submissions received from stakeholders and the case studies conducted by the CHE give no 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, and 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 coming 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.

It is thus incorrect to describe the above trends as resulting in a *convergence* between distance education and face-to-face education provision.

Distance Education and Face-to-face Methods Generally Remain Distinct

The *methods* that together comprise design of the programme remain distinct and ‘unblurred’, and there is no evidence that they will necessarily converge. 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 a 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 education providers harnessing ICT seem to think they are harnessing the benefits of good quality distance education, when, in most cases, they are simply finding technologically clever 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. Online discussion forums, for example, reflect an instance where the spatial separation between educator and learners is removed by the ‘virtual’ space of the Internet, but where there remains temporal separation. Scholars 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 and 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.

Slipping into Distance Education Provision through Online Delivery

In line with international trends, a number of the face-to-face institutions presented strategies for making more of their materials 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 of 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 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 is difficult to imagine the quality of the independent study component of the programme standing the test of scrutiny.

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 slip further into distance education.

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 produce 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 poor planning behind loose use of terms such as ‘convergence’ or a ‘blurring’ of distinctions.

Conclusion

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

- Assertions that distance and face-to-face *methods* used in education delivery are ‘blurring’ as a consequence of technological developments are conceptually flawed. The added complexity of a few educational strategies using ICT that cannot be simply categorized 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 6 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.
- It is also proposed that, while a shift towards the middle ground of the continuum will provide a richer mix of methods in some instances, 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 a heavy emphasis on independent-study. This rationale and focus of distance education provision is different from that of face-to-face provision.

This position is at variance with that taken by the South African in the Universities Vice Chancellor Association (SAUVCA), Occasional Paper, *Learning Delivery Models in Higher Education in South Africa*, (2003: 3) which 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 (then the 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 specialize and divide labour as between disciplines, the habit in teaching is for the same individual to do everything: develop the curriculum; organize the learning resources; teach the class; provide academic support; assess student learning.

This robust, cottage-industry model does not require much organization. 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 (ibid: 12).

This suggests clearly that, if it is important to increase access, models of educational delivery that facilitate such increased access need to be used. 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 provision by combining methods of educational delivery that can lead to economies of scale when applied to large numbers of learners.

Arguments that distance and face-to-face modes of delivery can no longer be distinguished 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 costs of different educational models and thus no systematic way of reducing costs of 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

Key Roles for Distance Education

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

The rationale provided by most institutions in the CHE investigation for embarking on distance education is rooted in the 1997 White Paper on Higher Education of, 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 characterized the key roles of distance education in South African higher education as:

- Improving participation rates of non-traditional students, taking cognisance of:
 - 'Race'
 - Age and
 - Gender
- Increasing access to historically marginalized students by making higher education:
 - More affordable
 - Easier to enter
 - Accessible through flexible learning opportunities and
 - Accessible to students in remote areas
- Providing for initial and ongoing career and professional development
- Expanding access to post graduate programmes, especially with use of ICT
- Increasing cost-effectiveness
- Improving quality
- Accessing new markets.

Each of these motives is discussed in more detail below.

Improving Participation

The CHE Task Team case study sample reflects that, in line with international trends, distance education programmes in South Africa do facilitate access to higher education for mature age, employed students who require a flexible study timetable and for whom it is difficult to go to a fixed urban centre to gain new professional qualifications or to upgrade their existing ones. Data received from programmes indicate that the majority of students in distance education are African, female, and over the age of 23. This is corroborated by analysis of HEMIS statistics, which show:

- That around 57% and 76% of all FTE distance education students at universities and technikons respectively are African;
- That around 80% of all headcount students are over the age of 23; and
- That females make up 61% of headcount enrolment at universities and 43% at technikons.

Surprisingly, a considerable number - 36,000 headcount students at universities and 16,700 headcount students at technikons - are under the age 23. General data on employment status could not be obtained, although typically the majority of students enrolled on distance education programmes are employed.

Increasing Access through Affordability

Several students' focus groups interviewed as part of the CHE 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. 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 Flexible Entry Mechanisms

Flexibility in entry requirements is a key factor in promoting increased access to higher education for marginalized students. A range of new admissions mechanisms and criteria that have been instituted actively facilitates access to most programmes in the CHE case studies. 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.

Any of the above strategies could apply equally to programmes using predominantly face-to-face methods of educational delivery except insofar as distance education has less rigid caps on student numbers on account of their lesser reliance on physical infrastructure.

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 twenty-first century. Access to, and participation in, higher education by non-traditional and/or marginalized 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 student focus groups confirmed that this was a key reason for choosing to study through distance education.

Increasing Access to Students in Remote Areas

The case studies 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 extensive infrastructure and specially geared administrative systems, the programmes offered by the dedicated distance institutions reflect low levels of support to rural students, with support only offered in a very limited number of urban centres.

Providing Initial and Ongoing Career and Professional Development

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

Six of the ten undergraduate programmes in the case study are in effect in-service programmes. In all instances, employment in the field is a prerequisite for enrolment and teaching and learning is strongly rooted in the work-based context. The two postgraduate programmes both have a professional focus. Only two programmes, both offered by a dedicated distance institution, lead to a general formative qualification.

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, simultaneously contributing to economic growth as the workforce is not disrupted while people engage with their studies on a flexible basis.

Providing National Access to Niche Programmes

Niche programmes serve to exemplify the potential that distance education has to be innovative and responsive to particular provincial and national needs. Various programmes that were part of the CHE Task Team case studies were niche programmes. Each of these is one of a kind, offered only by a single institution nationally.

Improving Quality of Programme Design and Delivery

Several institutions commented in their submissions to the CHE Task Team that the discipline and rigour involved in designing and developing the curriculum and materials for delivery through distance education methods had impacted positively on the way in which they approached design and delivery of their face-to-face programmes.

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 in the CHE investigation are examples of programmes that serve new markets.

Serving 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 a 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 potential role in distance education provision that needs exploration in future.

Addressing National Priorities

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 was in Science, Technology, and Health.

Rationale for Investing in Distance Education

It is possible to extract from the CHE investigation and international reviews the following general points about the rationale for investing in programmes that use predominantly distance education methods.

1. *Providing access to students for whom - either because of work commitments, geographical distance, or poor quality or inadequate prior learning experiences - traditional, full-time contact education opportunities would be inappropriate.* This reason is possibly the key motivating factor behind the use of distance education methods. This is illustrated by the CHE investigation, which shows that distance education is a major access mechanism for African students, women, older 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. However, taken as a whole, distance education is responsible for dramatically increasing levels of participation in higher education.
3. *Shifting patterns of expenditure to achieve economies of scale by amortizing 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 maximizing 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 90% of course enrolments, the vast majority of UNISA courses have less than 100 enrolments.

Rationale for Investing in Resource-Based Learning

Various reasons have been outlined above for adopting different teaching and learning strategies. These are largely linked to opening access to more and new kinds of students. However, reasons for adopting such teaching and learning strategies that pertain more directly to use of resources have been separated out. The intention behind this is not to set up new artificial dichotomies. Rather, it is to illustrate more vividly that moves to resource-based learning do not, *necessarily*, achieve the goals of distance education as articulated above. Concomitantly, while many of the

distance education programmes reviewed seek to overcome temporal and spatial separation through use of resources, some seek only to overcome distance, using direct communication via telecommunications technologies (such as video-conferencing). 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 use of well-designed instructional 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 use of 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 quality of learning experience
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 patterns of expenditure in this way (or are unable to do so because institutional financial policies make it impossible).
3. *Implementing strategies to shift the role of the educator.* This motive has been important in many education programmes, where educators have sought to maximize the educational impact of contact time with students. As such 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.

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 use of ICTs in education around the world, it is worth adding 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.

It is our understanding that many of the motivations described in the SAUVCA 2003 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*.

The Issue of National Need

In considering the role of distance education, note needs to be taken of the crucial policy difference between distance education institutions of economically developed countries and those in the developing world, in that the latter must be important elements in provision for *traditional university entrance cohorts*. In developed countries, by contrast, their functions are usually seen to be that of extending ‘second-chance’ opportunities and enhancing the life-long 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 3: 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. General contributions to adult education, to flexibility of the system, and to satisfaction of the electorate are looked upon as proper returns to use of tax revenue. Simultaneously, because students are adult, possibly already qualified, and pursuing personal or economic interests, it is also possible to countenance high failure-to-graduate 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.

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 reflected clearly in several of the CHE case studies and are also reflected, to a greater or lesser degree, in the institutional submissions made to the CHE Task Team. This raises the question of whether roles related to motivations should be differentiated among institutions.

In 2001, there were 29 299 distance education FTEs in predominantly face-to-face universities and technkons. This constitutes only 9% of FTEs at these institutions. Thus distance education provision remains a relatively small percentage of overall educational provision at predominantly face-to-face education institutions. The 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 overall costs of provision by achieving economies of scale. This is one of the key reasons for investing in a dedicated distance education institution. However, it is worth noting 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 findings of the CHE investigation, institutional submissions, and the refined understanding of the continuum in the South African context in 2003, there is an ongoing need for differentiated institutions – dedicated distance education and predominantly face-to-face institutions. However, it should also be understood that the functions of these institutions cannot be fixed permanently, too inflexibly and without sensitivity to context. For example, it was pointed out in institutional submissions to the CHE Task Team 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 CHE case studies at one of the dedicated distance education institutions where nearly 30% of students on both programmes researched were young, full-time students).

Specific Roles and Functions of the New Dedicated Distance Education Institution

The above analysis, supported by stakeholder submissions to the CHE Task Team, suggests that the new dedicated distance institution needs to develop a clearer mission for itself so as to make its own role more distinctive. Most of the roles of distance education 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 core and *essential* to the dedicated distance institution. The new dedicated distance institution should therefore be required to sharpen both the conceptualization and implementation of its roles and a timeline should be set for achieving this.

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:

- Increasing access through providing affordable opportunities and through flexible entry requirements.
- Concentrating mainly on large enrolment courses, and especially those courses contributing to formative degrees, so as to derive the benefits of economies of scale
- Developing its capacity in distance education delivery through research and reflective practice, including through staff development.
- Developing and implementing its potential for offering decentralized student support nationally.
- Engaging particularly in research and development of distance education practices, and contributing to the national debate in this area.
- Playing a 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, 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 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.

Conditions and Criteria for Provision of Distance Education at Predominantly Face-to-face Institutions

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 should 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 subsidized.

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 provision of distance education is cited. It requires that:

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

These conditions reflect the Ministry's underlying concern with quality in distance education programmes, particularly in face-to-face institutions. 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 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.

The CHE is of the view that the current formulation regarding duplication and overlap of programmes in the National Plan needs refinement. The statement on overlap should be qualified by adding ‘*unnecessary*’ to 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 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.

Summary

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 in section three 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 categorized 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.

There remains a strong conceptual, social and economic logic for investing in higher education programmes that predominantly use distance education methods. Distance education programmes – properly conceptualized, designed, and implemented – hold great promise for contributing to achieving the broader educational goals of the White Paper on Higher Education, particularly those of equity and redress.

However, the CHE investigation also indicates clearly that, despite pockets of excellence, there remain serious problems with 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 outlined below. 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.

Financing Distance Education Programmes in South African Higher Education

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 organizational 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 the ceiling of capacity of their speaking teachers 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 above. 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 and places and at times that best suit their personal circumstances.

By such methods, institutions can reach students who would not otherwise be drawn into education systems. Finally, they can also support, and encourage, highly desirable system developments towards internally generated quality assurance and accountability. Evidence of the veracity 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, consideration tends to take the form - is distance education cheaper than contact? - as if distance education is a set of social arrangements as standardized 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 education⁶ does suggest two fundamental conclusions:

1. Distance education institutions are usually more cost-efficient than conventional institutions, particularly when they enroll large numbers of students on each course in order to reap large economies of scale. This conclusion is in line with the NCHE observations highlighted in the section dealing with cost-effectiveness.
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.

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 generalization 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.

Considering Relative Financial Benefits

There is ample evidence that the methods of distance education can be used greatly to increase the productivity of education systems. *Prima facie*, the evidence and the logic of analysis seem indisputable. However, two kinds of 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, is a method in which the educator is responsible 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 assessed by peer review according to a set of common criteria, Open University provision was judged 'excellent' (the top rating) in almost half of all subjects that had been assessed, putting it in the top twelve of 120 HE institutions.⁷

The second rebuttal is to do with the minutiae of economic costing. Well established, large scale, distance education institutions are easily capable of producing equivalent educational outputs to those of traditional institutions whether expressed in certificates obtained or, even less difficult, per full-time equivalent year of study. However, they often do so partly by taking advantage of the historic investment in 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

⁶ See, for example, Dhanarajan, G. *et al.*, ed., (1994) *Economics of Distance Education: Recent Experience* Hong Kong: Oli Press.

⁷ Swift, D. (1996) *A Conceptual Analysis of the Costs of Distance Education*. SAIDE Concept Paper, unpublished.

be said to be subsidizing 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 the returns to lifetime earnings of degrees by distance education. 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 enviroing arguments can be ignored for 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.

Reviewing the Cost of Distance Education Delivery in South Africa

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, working with the ten CHE case studies, research was undertaken to establish the costs of a representative range of distance education courses in South African higher education. A single course from each programme was selected for the above financial analysis⁸.

⁸ See the CHE *Research Report on the Role and Nature of Distance Education in the South African Higher Education System*, 2004 for further details of this research (as yet unpublished).

Based on the research and taking ‘operational costs’ to mean direct academic and administrative costs and additional costs associated directly with a particular course (for example, course-level advertising and course design and development) plus a 30% institutional overhead, the following preliminary conclusions about the costs of distance education delivery in South Africa can be drawn:

- It would appear that correspondence type courses with limited learner support and limited recurring investment in course and materials design are able to cover operational costs from reasonable student fees, and some are left with a substantial financial surplus.
- It would seem that postgraduate courses are probably rightly funded on a parity basis with face-to-face provision.
- Distance education courses with fewer than 100 learners are probably too small to benefit from distance education economies of scale even if their student numbers doubled.
- Some nominally ‘contact’ courses may offer less direct face-to-face support (as a percentage of notional learning time) than nominally distance education courses.
- Distance education courses offering regular face-to-face contact can probably be operationally sustainable on reasonable fees when enrolments reach about 500 learners. Case study examples indicate clearly that, using economies of scale, it is quite possible to deliver high quality distance education, with adequate student support and ongoing formative assessment, at operational costs that can be covered by student fees.

In courses with limited individualized learner support, costs per student are not very sensitive to small changes in student numbers once enrolment reaches 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 courses with relatively low student numbers, even when the student numbers are doubled, enrolment is still too low to achieve significant economies of scale in terms of course and materials design processes.

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 operational 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 1,000+ learners do not enjoy significantly greater economies of scale with small enrolment increases, but are sensitive to declines in enrolment to below 1,000. However, considerable economies of scale are achieved with very large numbers.

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, it is worth reviewing the Ministry's position on the issue of funding.

The Ministry of Education's Position

The Ministry of Education's position on the matter as reflected in the 2003 *Funding of Public Higher Education: A New Framework, Ministry of Education*, is 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 on large scale, low cost 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, 2002).

Extracting the Key Issues

Responses received by the CHE Task Team from stakeholders to the above proposals 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 naïve to think that there will not be attempts find loopholes in definition that enable institutions 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), 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 upper postgraduate programmes.*

The extended quote above also indicates clearly that there is no dispute at the level of upper postgraduate (masters and doctoral degrees) funding, as distance FTE students will be funded to the same level as 'contact' FTE students regardless of mode of delivery. This is supported by the empirical research conducted in the case studies. This is, however, not supported by a more recent Ministry of Education document, *Government Allocations to Public Universities and Technikons* (MoE, 2003:7), which proposes that upper 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 and costs for face-to-face and distance education programmes are likely to be similar, this is problematic. If institutions are discouraged from offering upper postgraduate programmes using distance education methods, 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, it is important to ensure that input subsidies at the upper postgraduate level are the same for all modes of delivery. Thus, the proposals below focus primarily on undergraduate and lower postgraduate education, on an assumption that subsidies should be equalized at the upper 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 to create distance education 'cash cows'. Regrettably, distance education in South African higher education has included large-scale, poor quality programmes that would easily be able to turn healthy surpluses on even a 50% input subsidy, a surplus often substantially enlarged 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 that do not take account of this history will correctly not be taken seriously.

5. *Systemic complexity is a growing policy problem.*

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, 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 regulate and the greater the likelihood becomes 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.

Existing proposals

1. Equalizing 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 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 equalized 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, it is important that clear plans to demonstrate improvement in quality need to be provided before additional funding is granted.

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3. Equalizing 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 will improve the overall output of the system. Thus, 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, commentators will observe that similar criticisms about quality and value for money could well be levelled at various 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 from the 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.

2. Raising the Funding Percentage

Various proposals have been put forward over the course of debates on funding 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 for face-to-face programmes 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), and therefore a systemic increase seems unjustified under current circumstances.
2. Given the financial analyses above, together with further research that has been conducted, it is apparent that large-scale distance education programmes are being used to cross-subsidize small, inherently unsustainable programmes. This poses the question of what the role of distance education should be within the higher education system, an issue that has been raised in section four of this report. 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 fields and disciplines. Even if the goal is the latter, it is untenable to continue to fund small-scale distance education programmes through extensive cross-subsidization. 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, if 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 rationalization needs to occur.

The CHE notes there is merit in the argument 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.

Extracting a Possible Way Forward

Drawing from the above and from empirical research conducted in developing this *Policy Advice Report*, the following model is proposed:

- 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 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.
 - 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, empirical research suggests clearly that per-student costs of small distance education courses are actually at least as high as, if not higher than, 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).
 - 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.

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- 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 blanket equalization in funding of distance and face-to-face education. Instead, it leaves this to motivations on the part of higher education institutions. If sufficient motivation can be provided by providers of distance education programmes as to why they require additional funding and they can demonstrate that they are spending this on improving quality of their programmes, then the system will drift naturally towards the SAUVCA distance education sub-committee’s proposed funding formula contained in the Occasional Paper, *Learning Delivery Models in Higher Education in South Africa*, 2003. However, it is also clear from the empirical research that most large-scale distance education programmes, operating as they currently do, are most likely to be 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 delivery of distance education programmes in key areas (say, pre-service teacher education, project management training, or science access) 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 mechanisms for steering and transforming higher education.

Third, 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 specialized, 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 possibility of people misrepresenting 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 redress and equity in South African higher education. However, there are no clear policy levers currently for improving quality of delivery. The proposed 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 entitled *Government Allocations to Public Universities and Technikons* (MoE, 2003) proposed the establishment of a teaching development grant, which 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, it is important to introduce funding levers to encourage investment in quality distance education sooner than this. An interim Teaching Development Grant should therefore be established to create space for earlier implementation of the above recommendations.

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- Definitions differentiating between distance and face-to-face 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 occurs, 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 distinction between face-to-face and distance education, there is still 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, with time and effective follow-up on implementation of the proposals, a ‘case history’ can be compiled to assist with interpretation of definitions at the margins. As a starting point, 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, 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 additional support to review large-scale distance education programmes as soon as possible including 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 study individual courses for personal enrichment or who are taking one or two courses to complete qualifications started at other institutions. 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 up front that such students do indeed not intend to complete programmes of study or that they are enrolled elsewhere.

Possibly most importantly, the proposals above are based on the premise that it is not the business of a dedicated distance education institution to deliver a comprehensive programme menu across a full spectrum of academic fields/disciplines. From a financial perspective, the research suggests that keeping small-scale distance education programmes operational through cross-subsidization from large-scale programmes is often inappropriate, as it takes away money from large programmes that is urgently required to improve quality of delivery for large numbers of students. The priority for a dedicated distance education institution is to focus its 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 would represent 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

The CHE investigation indicates that there are clear and important roles for distance education in a changing higher education system. This leads logically on to the question of how to ensure that programmes delivered using predominantly distance education methods are of the highest possible quality.

This is particularly important in the light of the repeated concerns across all the policy documents, outlined in section two, about the quality of distance education in South Africa. Moreover, the majority of institutions raised the issue of quality both in their submissions to the CHE Task Team and during the CHE case study interviews as being a very important determining factor in regulating distance education provision. While increasing access is essential to the transformation of higher education in South Africa, educational provision must be such that students have access to high quality higher education and every opportunity to complete their studies successfully. Key indicators of quality in distance education programme provision are:

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

Arguments in favour of continuing to invest in programmes that use predominantly distance education methods 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 there is ongoing cause for concern about the quality of distance education delivery. The same observation may be true of predominantly face-to-face education, but this issue is beyond the brief of the CHE investigation.

It appears that problems in quality of distance education delivery are sufficiently serious to justify some specific interventions. The CHE is making recommendations in respect of the quality of distance provision to the HEQC, which is its statutorily responsible committee for quality assurance, rather than to the Minister of Education.

Quality Assurance in Distance Education: A Brief History

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.⁹ 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.

Following the investigations of the the National Commission on Higher Education, the Green Paper on Higher Education 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 to develop 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 discussion document entitled *A Distance Education Quality Standards Framework for South Africa*. After extensive comment from members of the newly formed National Association of Distance Education Providers of South Africa (NADEOSA), a policy statement was prepared, *Criteria for Quality Distance Education in South Africa. Draft Policy Statement* (DoE, 1998). [Referred to hereafter as the 1998 *Criteria*]. However, it was decided that, rather than declaring 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* (October 2001).

The SAQA document has, unfortunately, hardly been referred to or used, with no call for distance providers to use it. While it is an official document, it is not a policy document, and is very far from being a regulatory framework. Instead, 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/organizations (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 *NPHE* (MoE, 2001) raised explicitly the issue of the quality of distance education provision outside of the dedicated distance education institutions, in particular that involving partnerships between public and private providers. As is pointed out in the *National Plan*, this expansion has not

⁹ However, there was one very interesting regulation - that correspondence colleges were not allowed to use less than ten percent of their annual income from correspondence tuition on 'revision of lectures and correcting of texts'.

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).

It is clear from this brief historical account that there are long-standing concerns around quality both in the programmes that are offered by dedicated distance education institutions and 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, needs to be quality assured.

The body charged with responsibility for quality assurance of higher education generally, including distance education in higher education, is the HEQC. Over the past few years the HEQC has been intensely involved in policy and systems development for the accreditation of higher education programmes and the audit of the internal quality management systems of institutions and quality promotion and capacity building. During the period of new systems development, it has conducted programme accreditation using provisional criteria and processes, undertaken visits to institutions and performed pilot audits. To contribute to the efforts of the HEQC, below are presented five strategies for its consideration that could be used to ensure the quality of distance education provision. The CHE is aware that the HEQC has made considerable progress in the development of criteria and strategies for evaluating quality assurance arrangements at institutional and programme level. The HEQC should consider how the recommended strategies could extend or reinforce its existing and planned requirements for quality assurance, taking into account issues of capacity, resources and coherence with already existing systems and procedures.

Strategies for Assuring the Quality of Distance Education Provision

Strategy No 1: Infusion of distance education concerns into HEQC criteria

As argued above, distance education methods can generally be distinguished from other methods. However, it does not follow that the characteristics of distance education provision will be markedly different from those of face-to-face education – the continuum of provision means that, when it comes to 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 including distance education. This means that it is important that distance education concerns are integrated into the HEQC criteria.

The HEQC has two discussion documents containing a 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

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

This difference in approach is justified, in that 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 mode of delivery, while audit evaluations focus on institutional systems. Use of distance education methods demands design and management of certain specific systems. In order to work effectively, these systems generally need to be institutionalised, perhaps even 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 tables below, 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.

Even though related primarily to institutional systems, these tables could also be used in the programme accreditation process to engage with existing programmes that are to be offered using distance education or online learning methods (see also Strategy no 5).

Table 4: Extract from Proposed Criteria for the HEQC's First Cycle of Audits: 2004 - 2009 (HEQC, March 2003). * Note: The CHE is aware that the HEQC has reduced and streamlined its criteria in its finalised version and that the criteria in the following extracts have already undergone revision.

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.
- iv) 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.

The CHE proposes that the HEQC consider the following:

- 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.
- Programmes moving to distance education or to online delivery should continue to be viewed as *new* programmes by the HEQC, and thus subject to accreditation processes.

However, the HEQC is only able to conduct institutional audits every six to eight years and is currently concentrating on the accreditation of new programmes. This means that much distance education provision will remain unexamined by the routine activity of the HEQC. Hence there is a need for additional strategies.

Strategy No 2: A Comprehensive and up-to-date set of quality criteria for distance education

While acknowledging the need for infusion, the HEQC thought it necessary to commission research on specific criteria for distance education.

SAIDE, which undertook the commission, thought it best to base this work on the 1998 DoE *Criteria for Quality Distance Education in South Africa: Draft Policy Statement*, both because it was already in use in the distance education community and because of the suitability of the framework for distance education. 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 investigation, 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;¹⁰ and
- Increased use of ICT in both face-to-face and distance programmes.

With regard to the last point, as was highlighted in findings from the CHE case studies and stakeholder presentations to the CHE Task Team, South African higher education providers by and large tend to exaggerate the potential of ICT for transformation of teaching and learning, and seemingly lack awareness of the importance of analysis of the teaching, learning and administrative environment before selecting appropriate technology. The technology environment also necessitates much more collaboration between public higher education institutions than has been customary in South Africa up to this point – and collaboration with a wider range of organizations (international providers, private e-learning organizations, technology companies, materials developers, non-governmental organizations, and so on). This necessitates much greater emphasis on protocols for collaboration than in the first set of quality criteria. Finally, the staff development and staff time demands of development and delivery of online courses are only now being encountered.

The 1998 *Criteria* document has limitations that have become apparent from the distance education research and evaluation work in the past 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, some CHE case studies showed 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 – the absence of formative assessment, too little demand made of students by the kinds of assessment tasks, and poor management of assessment. Finally, the CHE case studies show that there is still insufficient appreciation and understanding in the country of the centrality of a learner support system that is integrated into the design of programmes and courses.

¹⁰ 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.

Other considerations in the revision of the 1998 *Criteria* document was that, though it would not be organized 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;
- 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:

- Assessment
- Staff capacity
- Work-based learning.

The 1998 *Criteria for Quality Distance Education in South Africa* have thus been revised along the lines suggested above. These revisions are being done through various processes organized by NADEOSA.

The CHE proposes that the HEQC give consideration to approaching NADEOSA to finalize and publish the revised *Criteria for Quality Distance Education in South Africa - 2003*, and to encourage distance education providers to use the document 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 either to ignore them or to pay lip service to them. Because they are too all-embracing, bad practice which is remediable might well escape attention. It is therefore helpful to identify particular areas of bad practice in the current context, identify 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 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. 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 should be read together with the more comprehensive NADEOSA *Criteria for Quality Distance Education in South Africa - 2003*. The set of minimum targets were developed drawing on examples of bad practice derived from the case study research conducted for the CHE Task Team investigation, consultation with distance education stakeholders through NADEOSA, and SAIDE's experience in evaluating and supporting distance education programmes over ten years.

The minimum targets have been presented in relation to 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 the minimum target/s are organized 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 organized.

In implementation of the minimum targets, particularly in the application of 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 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 periodic spot checks to ensure that this is being done.

The CHE proposes that the HEQC consider the following:

- Providers of distance education programmes should be encouraged to adopt the overall quality criteria and ensure that they meet the minimum targets;
- The HEQC should use the minimum targets in the process of accrediting existing distance education programmes; and
- 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.

Strategy No 4: Review of large-scale distance programmes

The *Criteria* and the *Minimum Targets* could provide a good basis for the intended focus of the HEQC on the review of large-scale distance education programmes. 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 peer and expert teams arranged by the HEQC.

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 danger of compromising quality for the sake of revenue 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 an independent and objective body has to say what is or is not acceptable, taking into account peer and expert opinion.

It is proposed that the HEQC consider conducting reviews for distance education with financial support from the Ministry, that it 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

With regard to new programmes, the CHE investigation 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 an increase in use of electronic learning methods. There is, however, 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.

As was mentioned under Strategy No 1 above, the HEQC has a set of criteria which will be used by audit teams to judge whether or not providers with distance education programmes have the requisite systems in place. The criteria in the four distance education tables in the HEQC's *Audit Criteria* could be applied to all new distance education programmes (a new programme includes existing programmes to be delivered using predominantly distance education methods for the first time).

However, if a provider needs guidance in the establishment of 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 application of the criteria in the distance education tables 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. A separate document that contains this additional detail has been prepared.

This document is based on *Criteria for Quality Distance Education in South Africa - 2003*. It is organized 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.

The CHE proposes that the HEQC consider the following:

- The HEQC apply the four distance education tables in the HEQC audit document to judge institutional readiness to offer programmes using distance education/online learning methods
- The HEQC consider approaching NADEOSA to 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 should 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*.

Strategies for Developing and Sharing Quality Learning Resources

Introduction

As was noted in the policy review in section two above, national policy processes have accorded great importance to 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 as they evaluate, select, and design courses around the materials;
- 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, and, for learning to be effective, it needs to be rooted in the local context as well as being internationally comparable.

However, development of high quality learning resources is complex, time-consuming, and expensive, and needs an effective set of strategies. As was pointed out in the CHE case study research, one reason for the shortage of high quality local material is that institutions budget too little time and money for the 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 as well as collaborative materials development. At a two-day national workshop with academics who have a keen interest in learning resources development, these examples were discussed and possible strategies discussed.

The strategy that emerged as the most feasible is the one presented in this section: facilitation of a decentralized 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 the strategy is described in detail 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 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 change agents, organizational 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’ (Conffey in Moore and Lambert, 1993).
- 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 organized 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 engage in course design and learning resources/materials development 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 have been achieved and learning resources developed, the centre would cease 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 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 in 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 cooperate in development of 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 delivery of the National Professional Diploma in Education, in which certain providers developed some of their own materials, but 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 amortize 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 organization. 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 organizations.

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 contextualized 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 South African Development Community'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 development of differentiated learning resources that are suitable for their particular contexts.

⇒ *Guiding Principles for a Well-Functioning Centre of Innovation*

As seen above, the configuration of centres can be varied, but there are some basic guiding principles that will characterize 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

- Organization 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 web sites 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 available learning resources 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
 - 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, could play a quality assurance role, or could play a role in dissemination of 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

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 allocation of financial resources.

The question of funding is both one of 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 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 use of donor funding for 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 organizations 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 be usefully 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.

Conclusion

In the 1997 White Paper, the Ministry expressed its support for 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 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 cease. 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, 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:

- Identification of areas of national need where learning resources would be necessary, and provision of funds for materials development in these areas.
- Making available funding (possibly from the teaching development fund in the new funding framework) 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 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.

Cognizance 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. The CHE proposes that the Ministry of Education establish a specialist task team to further investigate the above proposals and strategy and support and review pilot initiatives prior to expanded implementation.

Issues Requiring Additional Investigation

Although not the focus of the CHE Task Team investigation, five specific issues arose on a number of occasions and are thus proposed for further investigation by the Ministry.

Student Finance for Distance Education

The 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. The only option available to distance education students at face-to-face institutions is to obtain a study loan from a commercial funding company. Such students often are required to pay these back with large interest charges, making studying very expensive. The question therefore of NSFAS support for distance education students registered at face-to-face institutions has to be raised.

Student Access to Computers and Email/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 the CHE Task Team investigation, it appears from research by the dedicated distance institutions that only between 35% to 40% of students have access to use of a computer. However, the reliability of these figures as far as actual usage is concerned has not been put to the test. Interviews with student focus groups as part of the CHE investigation and subsequent attempts to contact students enrolled on the programmes in the CHE case studies, 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 post-graduate programme that specifically targets practicing advocates and attorneys, show that 30% of the students on this programme do not have access to email. Recent research done by the University of Pretoria¹¹ shows that, of 1,900 students enrolled on one of three education programmes offered through distance education, only 0.4% of students had access to email.

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.

¹¹ 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 Organisation in South Africa (NADEOSA) conference in August 2003.

Learning Centres

This issue was specifically 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 through out South Africa including 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 cooperate in establishing shared, properly staffed, well-equipped, jointly financed Higher Education Learning Centres.

These Learning Centres should provide administrative and logistical support, serve as sites for the delivery of open and distance learning programmes with effective teacher-student interaction and access to on-line 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 cover 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 CHE 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. Ed. (Primary) programme, where tutoring and support is offered in 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 Other Parts of 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 begs the question of how best to coordinate and regulate such provision so that it is of high quality, responsible in nature and meets local needs. Self-regulation on the part of institutions through, say, an agreed upon code of conduct would be the ideal. However, in the absence of such self-regulation, other regulation could be necessary.

The General Agreement on Trade in Services (GATS), which extends World Trade Organisation-agreed rules and commitments to the service sector, including higher education, could also come into play in the export of distance education programmes.

Summary, Conclusions, and Recommendations

Introduction

In this section, key points are summarized, conclusions are drawn together, and recommendations are highlighted, with reference to earlier sections of this document as appropriate.

The Research Process

This *Policy Advice Report* was developed after an extensive investigation conducted under the auspices of a specially constructed CHE Task Team. The investigation was supervised by the Chief Executive Officer of the CHE and conducted by the South African Institute for Distance Education 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 investigation focussed on distance education in the public higher education sector, as most of the issues on which the Minister asked for advice related to this sector. However, where appropriate reference is made to private provision.

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 Characteristics of Distance Education

The following general characteristics can be discerned. **Distance education in the public higher education sector 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 more FTEs in distance education than in face-to-face education in 2001 in the field of Education, and growing numbers in Economics and Management Sciences; and**
- **Primarily at first qualification level.**

Very little emphasis is currently placed on Science, Engineering and Technology, which accounts for only 7% of university and 17% of technikon distance education in 2001.

Furthermore, **distance education students at public institutions are:**

- **Largely over 23 years of age (80% of headcount students), but include a substantial number of students (50,000 of headcount students) younger than 23;**
- **Predominantly African (57% compared to 49% in face-to-face university provision in 2001), with 55% of all African headcount enrolments in universities in 2001 being in distance education; and**
- **Mostly women at universities (61% compared to 53% for face-to-face provision), and men at technikons (57% compared to 50%).**

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 HSRC HRD Review (2003) analysed information from the DoE of 86 registered private providers in 2001 and concluded that there were only some 30,000 headcount enrolments for 'own certificates' (HSRC, 2003:421). CHE information¹² 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 sector is currently of limited significance.

¹² Email communication from Mr. Theo Bhengu of the HEQC on 2March 2004.

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 wrap-around 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 decentralized rural locations, one-on-one support in mother tongue, considerable work-based mentoring, and formative assessment strategies that include tracking of student progress through portfolios. Characteristics of the case studies are described in Section 3 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 points 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 at the dedicated distance education institutions 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 that 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. The continuum of education provision can be used to describe a range of educational practice, 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 students 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 face-to-face pole.

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 characterize 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 categorized 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 CHE therefore supports the Ministry in the notion that, within this continuum, there is a clear role for the dedicated distance education institution to *focus* on distance education provision.

In line with almost all the stakeholder submissions to the CHE Task Team, **the CHE does *not*, however, believe that a monopoly on distance education by the new dedicated distance education institution is either feasible or desirable.**

The CHE notes that distance education requires particular expertise and systems. However, it is evident that some predominantly face-to-face institutions have acquired such expertise and have developed systems to produce high quality materials and to organize extensive learner support in rural areas. Therefore, **the CHE supports the notion that, while provision by 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

As can be seen from the section on the ‘**Significance of Distance Education**’ above, distance education has a key role to play in increasing participation rates in higher education in South Africa. This role can be further described under three categories

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 either inappropriate or inaccessible.**

This reason is possibly the key motivating factor behind the use of distance education methods. This is illustrated by the CHE investigation, which shows that distance education is a major access mechanism for African students, women, older 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 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 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 2001 account for nearly 90% of course enrolments. .

3. **Shifting patterns of expenditure to achieve economies of scale by amortizing 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 maximizing 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 90% of course enrolments (see above), 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 section four of this document.

A Framework for Distance Education Provision

The CHE distance education investigation has underscored 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.

The CHE believes that the three mechanisms of funding arrangements, quality assurance and institutional planning are sufficient to steer distance education provision. Recommendations are thus grouped under each of these headings. Recommendations in respect of quality assurance and enhancement are for the consideration of the HEQC, which is statutorily responsible for this area of work.

Funding

The CHE notes there is merit in the argument 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.

The CHE therefore recommends 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.

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- 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, 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 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. This figure could be adjusted by the Ministry, depending on how it wishes to steer the system. 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.

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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 up front 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 on section five. Briefly:

- It does not propose to use policy to achieve any equalization 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. For example, the Ministry could promote the growth of distance education in the field of Science, Engineering and Technology in this way.
- **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. However, there are no clear policy levers currently for improving quality of delivery. 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 section 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 CHE proposes that the following **definition** be used initially for this purpose.

- **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, a programme must have a full-time equivalent enrolment of more than 50 students.**

Quality Assurance

Much of the publicity given to distance education over the past ten years has been negative. It is thus important to note that among the case studies conducted for this project, a number of very positive features were recorded. 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, that is learner centered, 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 decentralized 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, 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.

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- Includes collaboration with key stakeholders in design and delivery, thus ensuring congruency 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.

Policy documents, stakeholder comment and the CHE case study research also reflect that there are grave 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).

In the last 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 HEQC requires a set of strategies not only to describe quality and advocate it, but to ensure that providers embrace quality actively and, even if reluctant, are obliged to conform their practice to certain minimum standards. Furthermore, account must be taken of the likely tendency to offer more courses entirely or predominantly online as opposed to using computer technology to support face-to-face learning.

The CHE makes the following six recommendations for the consideration of the HEQC 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** in three different ways:
 - a) In the Audit Criteria, retain criteria of particular relevance to distance education provision possibly as a separate set of tables;
 - b) In the Accreditation Criteria, ensure that the phrasing of the criteria covers the concerns of distance education programmes adequately;
 - c) In accrediting providers to offer new programmes, use the distance education tables in the Audit Criteria to judge provider readiness to offer programmes using distance education/electronic learning methods.
- 2) **Programmes moving to distance education or to online delivery should continue to be viewed as new programmes by the HEQC, and would thus be subject to a truncated accreditation process, focusing only on mode of delivery.** This is of particular importance given that institutions are likely to make increasing use of technology in the future.
- 3) **The HEQC should consider asking the distance education community, possibly through the National Association of Distance Education Organizations of South Africa, NADEOSA, to prioritise quality** and to:
 - a) Finalize, adopt, and publish the revised *Criteria for Quality Distance Education in South Africa - 2003* as well as emerging *Minimum Targets* based on this document and use them for self-evaluation and setting up internal quality assurance systems;
 - b) Finalize, adopt, and publish the companion document *Provider Readiness to Offer Programmes using Distance Education and/or Electronic Learning Methods* and use it to guide establishment of the required systems for distance provision.
- 4) **The HEQC consider conducting reviews for distance education with financial support from the Ministry, that it 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.** By way of an example, by reviewing the 24 courses with enrolments of over 3000 in 2001 at UNISA, the HEQC could reach nearly one third of all UNISA's course enrolments. Similarly by reviewing at most 14 distance education teacher education programmes at predominantly face-to-face institutions, the HEQC could reach nearly 71% of distance education FTEs at such institutions.
- 5) **The HEQC consider requiring all distance education programmes, whether offered by dedicated distance education institutions or predominantly face-to-face providers, to meet a set of minimum targets, and undertaking periodic checks to ensure that this is happening.**
- 6) **The HEQC as well as student organisations consider a campaign to inform students of the quality of provision they should expect from a distance education programme from a teaching and learning perspective.** This could be part of a wider campaign to

assist students to ensure that programmes for which they enrol are properly accredited and to know to whom they have recourse, especially in public/private partnerships.

The CHE wishes to emphasise the importance of implementing all the above strategies. Relying solely on the current HEQC's routine audit and accreditation processes will not be sufficient as, first, the HEQC is only able to conduct an institutional audit once every six years (and this deals primarily with institutional systems) and, second, the HEQC is currently concentrating on the accreditation of **new** programmes. Particularly, given the extent of current distance education provision in South African higher education, it is imperative to institute quality assurance measures such as 4) 5) and 6) above to ensure that current poor practices are eliminated. **The CHE therefore urges the Ministry to provide the necessary funds particularly for proposals 4) and 5).**

The CHE wishes also to note that the above measures will assume added importance, should there be a growth in private provision of distance education, as has occurred elsewhere in Africa.

The CHE also recommends that institutions be asked to establish throughput rates for different distance education programmes and to interrogate the low success rates identified in section 2 above, in some sectors.

Institutional Planning: The Role of the Dedicated Distance Education Institution

The CHE is of the view that the newly created dedicated distance education institution is not under threat. In reaching this conclusion, the CHE has taken 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.¹³ In most cases these were not related to competition from the face-to-face institutions.
- The major competition for UNISA arose from 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.
- Although UNISA headcount enrolments dropped from 1996 to 2000 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 realization 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 definition¹⁴

¹³ Reasons include 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.

¹⁴ It might also be mentioned that participants in the consultation in Cambridge, England, highlighted how the entry of other institutions into distance education had had very positive effects on UK Open University.

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 CHE recommends that 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 and the SAUVCA Occasional Paper, *Learning Delivery Models in Higher Education in South Africa*, 2003), and deliberations with international distance education specialists, **the CHE recommends that the dedicated distance institution should:**

- **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 decentralized 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

The CHE also notes that currently distance education constitutes between 4% and 32% of FTEs at those traditionally face-to-face institutions offering distance education. Altogether 10,96% of FTEs at traditionally face-to-face universities are in distance education and 4.74% of FTEs at traditionally face-to-face technikons.

The CHE recommends that, in general, the predominantly face-to-face institutions should remain just that – predominantly face-to-face. This should, however, 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. Realization of such institutional goals would almost certainly involve substantial use of distance education methods.

According to the strategies to ensure 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.

The CHE thus proposes that the Ministry should not restrict the educational methods that institutions use to fulfil their missions and achieve their goals, as we believe that 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 three, four, and five above for ensuring quality will ensure that reasonable levels of quality are achieved.

Moreover, the CHE recommends 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 needs urgently 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. **The CHE recommends that this matter receives urgent attention**

Learning Resources

In the 1997 White Paper on higher education, the Ministry expressed its support for 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, **the CHE proposes that the Ministry establish an enabling environment in which a virtual network of centres of innovation in course design and development can be established.**

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 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 cease. Within such a needs-driven network, new centres would emerge on an ongoing basis

This decentralized 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. Set up and fund an information service.

This service could be located within an appropriate existing structure so as not to unnecessarily duplicate existing infrastructure. 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. 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:

- 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. Ensure the development of guidelines for the production of quality learning resources.

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.

The CHE 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 around the country currently in operation. 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 therefore is needed.

The CHE wishes to align itself with SAUVCA's proposals on a national network of learning centres, which is:

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).

The CHE agrees that a Task Team should be established which involves SAUVCA and CTP to investigate mechanisms and procedures for 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.

The CHE proposes, however, 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

In the introduction to this *Policy Advice Report*, the CHE reiterated the commitment of the 1997 White Paper 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 advancement of knowledge.

The CHE believes that the investigation conducted for this policy advice to the Minister of Education demonstrates the crucial contribution of distance education to such a system, especially with regard to affording lifelong learning opportunities to working and 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 concerns about quality 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.

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Regulation of Distance Education Provision (with a focus on international examples)

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