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Implementation Strategy for Open Learning in Post School Education and Training System

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Implementation Strategy for Open Learning in Post School Education and Training System

1. Introduction

One of the obligations of the Department of Higher Education and Training (DHET) is to increase access to educational opportunities for young people that are not in employment or education and training (NEET) and those who experience barriers to learning. Such barriers would include geographical isolation, discrimination on the basis of race, gender, age, or physical disability, financial abilities, the inability to take time off work for a course, lack of 'appropriate' qualifications, and the use of pedagogical approaches that restrict accessibility to learning.

The White Paper for Post-School Education and Training¹ noted the competing challenges to increase enrolment, throughput and curriculum relevance within a system and infrastructure that is already under strain. It also highlighted the need to cater for a very wide variety of potential student needs – including mature adult learners needing to learn and work at the same time, as well as younger people who may have dropped out of the schooling system due to financial, social, learning and other barriers to learning. It directs towards access not only to a wide range of alternative kinds of programmes, but also to more flexible modes of delivery, which do not require them to attend classes very regularly, at fixed times and at central venues.

Open learning offers the potential to address these competing needs and challenges. Open Learning lays emphasis on well-designed learning materials, and possible achievement of economies of scale. The White Paper emphasised the challenges of substantial up-front investment in curriculum design and materials development; access to these learning materials, structure and pacing, meaningful formative and summative assessment; accreditation; investment in decentralised student support and increasing use of educational technology.

¹ Department of Higher Education and Training, 2013: White Paper for Post-School Education and Training. Building an Expanded, Effective and Integrated Post-School System.

The DHET will implement open learning in an organised, articulated, structured and systematic manner to increase access to educational opportunities and will include free access to education and training opportunities for all and in specific free access to learning support, assessment (on success rates) and development of workplace skills for those who are the poorest of the population.

In 2013 the DHET developed a Concept Note for Open Learning² that:

- created a common definition of open learning for the post-school education and training (PSET) system;
- served as the basis and starting point for the development of an open learning policy for the PSET system;
- worked towards the development and implementation of a model of open learning services and activities for PSET students; and
- provided a starting point for cooperation and collaboration at all levels of government, non-governmental organisations, institutions and the private sector in providing coherent open learning opportunities in South Africa.

The concept note identified five programme areas for possible implementation of open learning (planning towards wide scale implementation). These are:

- Skills programmes in the implementation of the National Infrastructure Plan;
- The development of programmes for the National Senior Certificate for Adults (NASCA);
- Technical and Vocational Education and Training (TVET) College subjects that are not widely offered at TVET Colleges;
- University programmes to increase access to higher education; and
- Career Development Practitioners' programmes for out-of-school youth to assist in Career Development Centres/walk-in centres/high schools.

² Department of Higher Education and Training (2013): Concept Note: Open Learning in Post-School Education and Training.

2. 2013 Implementation Strategy for Open Learning

The concept note presented the first Open Learning Implementation Strategy and was approved by the Minister on 25 June 2013.

The Implementation Strategy focussed on the conceptualisation/development of open learning in the DHET and to initiate the development of an open learning system for post school education and training. The objective of this strategy was to create an enabling environment for the implementation of open learning approaches and to identify workable models of open learning, especially for the area of adult and youth, and the development technical and vocational skills using open learning. The outcome of this strategy was the development of an open learning conceptual framework, and user specifications of an open learning system as well as policy implications for government.

As part of the implementation this concept note was widely consulted with senior management, branches and with experts and stakeholders in the 5 programme areas above and served as the basis to develop the *Concept Framework for an Open Learning System in Post-School Education and Training in South Africa*³ that included user specifications and policy implications for government.

The concept framework:

- built an understanding of open learning, including the key characteristics of an open learning system;
- outlined key policy and other implications for the DHET in creating an enabling environment for open learning; and
- proposed open learning implementation initiatives.

3. Open Learning Developments 2014/5 – 2015/6

During this period, the DHET laid the foundation for the development of an Open Learning System for Post-School Education and Training. These include:

³ Department of Higher Education and Training (2013): Concept Framework for an Open Learning System in Post-School Education and Training in South Africa.

- the conceptualisation of a flexible model of learning delivery;
- the development of an implementation strategy;
- the development of a prototype of a learning management system for open learning;
and
- the identification of two programmes to be piloted from 2016/17 onwards.

4. 2016 Implementation Strategy for Open Learning in Post School Education and Training System

The Implementation Strategy consists of 10 outcomes, viz.:

1. Developing a policy framework for open learning in PSET;
2. Formulating and implementing an Open Learning Advocacy Strategy;
3. Developing an integrated information structure for open learning;
4. Developing the National Open Learning System (NOLS) for PSET;
5. Developing open learning courses/programmes;
6. Collecting case studies on the application of open learning in PSET that can be shared amongst countries;
7. Coordinating and researching the use of Open Education Resources (OER) in post school education and training;
8. Supporting an institutional network to take forward open learning;
9. Developing a model of distributed learning; and
10. Organising a network of technology enabled centres and providers.

The following paragraphs elaborated on the outcomes. In each section, planned timeframes are indicated.

4.1 Outcome 1: Developing a policy framework for open learning in post-school education and training

The White Paper (2013) lays the foundation for the development of a policy framework for open learning in PSET. Furthermore, the Minister of Higher Education and Training published the *'Policy for the provision of Distance Education in South African Universities in the context*

*of an Integrated Post-School System*⁴ in terms of section 3 of the Higher Education Act, 101 of 1997). The policy is part of a broader focus on building the capacity of the PSET system. As in the whole PSET system, the current infrastructure within the South African university sector cannot accommodate the needed expansion. Open learning, and in specific the use of distance education methodologies would make a significant contribution to the required growth in the sector. The Policy provides a statement for the provisioning and expansion of quality distance education at higher education institutions. It includes an overview of the policy context, describes the distinctiveness and purpose of distance higher education, and identifies mechanisms for steering distance education and for creating an enabling environment for quality distance provisioning.

Furthermore, the University Education Sector has a well-established management information system with disaggregated data on the provision of distance education in Universities.

Although distance education is not a synonym for open learning, this policy addresses the critical issues of open learning and how it can contribute to increased access and quality in higher education institutions.

This notably leaves the PSET system with a gap in the TVET and Community Education and Training (CET) colleges sector. Therefore this outcome, as well as the following outcome initiate the collection of data and the development of a policy framework for distance education in TVET and CET colleges.

The following activities are associated with outcome 1:

- 4.1.1 The DHET wants to determine the extent of the current open and distance education offerings in TVET colleges through a survey to outline the current status of open and distance education in TVET colleges and identify issues that DHET must address in order to institutionalise open and distance education in TVET colleges. By June 2016

⁴ Department of Higher Education and training (2014): Policy for the provision of Distance Education in South African Universities in the context of an Integrated Post-School System (Government Notice 535 of 2014) 7 July 2014.

a survey report will be published of distance education provision in TVET colleges in South Africa.

- 4.1.2 Because the CET College sector is relatively in its initial developmental phase, it will be assumed that open learning and distance education methodologies will be integrated in its development.
- 4.1.3 In 2018/9 the DHET, through extensive collaboration by all branches and in consultation with stakeholders, will publish a policy framework for open learning in PSET. This document will identify focus areas and develop a statement that describes the importance of the focus area and justifies why it should be included in the open learning system of the country, as well as formulate statements of recommendation that specifies the actions that need to be undertaken in order to ensure that the defined issue is adequately addressed. This process will include consultation with senior and broad management and an Open Learning Steering Committee.
- 4.1.4 Key to the success of this document, is the establishment of an Open Learning Steering Committee, comprising of the following:
- DHET Branches (VCET; University Education; Skills Development; and HRD, Planning and Monitoring Coordination)
 - The Department of Basic Education (DBE)
 - Department of Telecommunications and Postal Services (DTPS)
 - Department of Labour (DoL)
 - Department of Science and Technology (DST)
 - Universities South Africa
 - Sector Education and Training Authorities (SETAs)
 - National Artisan Moderation Body (NAMB)
 - Quality Assurance Bodies (Council of Higher Education (CHE); UMALUSI and Quality Council for Trades and Occupations (QCTO))
 - Universities active in open learning and open educational resources (OER)
 - South African Council for Higher Education (CHE)
 - South African Institute for Distance Learning (SAIDE)
 - Commonwealth of Learning (COL)
 - OER Africa

The purpose of the Steering Committee is to advise the DHET on possibilities and opportunities to expand the PSET system through open learning and to contribute and shape the strategic direction of open learning in South Africa. This group will be instrumental in:

- contextualising the concept of open learning and other related terms in the South African post schooling environment;
- identifying possible opportunities that open learning can play within the expansion of post schooling in South Africa with specific focus on universities, TVET and CET colleges and skills development;
- identifying drivers of open learning that will enable the implementation of open learning in post schooling in South Africa;
- considering challenges of implementation in relation to an open learning system; and
- advising on the content of the policy framework for open learning in post school education and training.

4.1.5 Following the directives emanating from the policy framework, relevant policy/policy directives will be developed that the Minister of Higher Education and Training will publish.

4.1.6 Furthermore, this process will also result in a detailed funding strategy for open learning in the PSET.

4.1.7 In specific, and in line with the White Paper (p54) the DHET will include open education resources (OER) in the policy framework. The use of high quality OER has the potential to increase the scale of provision, reduce costs and assist in assuring the quality of provision. DHET will consider an appropriate open licensing framework for use by all education stakeholders, within an overarching policy framework on intellectual property rights and copyright in the post schooling sector. In particular, the policy framework will seek to address the dissemination, adaptation and usage of education resources developed using public funds as OER. This will avoid a high level of duplication within the existing post schooling system, and enable learners to participate actively in their own learning, to access resources that

are suitable to their own context and to shift away from reliance only on paper-based resources.

4.2 *Outcome 2 – Formulating and implementing an Open Learning Advocacy Strategy*

The adoption of open learning principles will require educational policy makers and practitioners within the current PSET system to understand these principles and implications for their own work. For this to take place, DHET needs to champion open learning through the formulation and implementation of an Open Learning Advocacy Strategy which enables key players to understand the value of open learning, how it will strengthen the existing system and what is required for this shift to take place. Key players include education policy makers at national and institutional level, educators, librarians, and managers. This advocacy strategy should be led by DHET and needs to extend to cooperating with other education bodies such as SETAs, the QCTO, the CHE and Umalusi who are responsible for quality assurance, as well as the work of other departments such as the e-Skills Initiative of the Department of Telecommunications and Postal Services. It is suggested that DHET work with key role players to plan this advocacy strategy and develop an Action Plan to take this forward. This is vital as the importance of facilitating progression through the education system will have direct implications for their work, particularly in urgently formulating a clear, easily understood and accessible process for pursuing accreditation, RPL and credit transfer.

4.3 *Outcome 3 - Developing an integrated information structure for open learning*

Implementation of any initiative is dependent on accurate, valid, reliable and relevant data and information. Currently there is no quality data source available for open learning in the PSET system.

4.3.1 By 2017/8 the DHET will develop common indicators to measure progress in open learning in the PSET system. These indicators will be integrated in the DHET's *'Compendium of Indicators to Monitor the Performance of the Post-School Education and Training System'*.

4.3.2 While open learning indicators are necessary to identify critical factors to determine, a standardised process of collecting data and report on progress must be adopted.

The DHET, in consultation with institutions and stakeholders will develop a data standard for national strategic reports for open learning in the PSET system and publish it annually. The *'Regulations Governing Reporting of Higher Education Institutions'*, Higher Education Act No. 101 of 1997, section 41 read with section 69, as published in Government Gazette No. 37726 Notice No. 464 of June 2014 will enable the DHET to receive open learning reports from public universities. Currently universities are reporting annually to the DHET as prescribed by the regulations. Open Learning performance indicators will be included as part of the Governance indicator process.

The same process will apply in public TVET and CET colleges. TVET and CET colleges will follow a similar integrated reporting mechanism as universities to report annually on open learning.

- 4.3.3 By the end of 2018/9 the DHET will publish the first annual National Strategic Report for Open Learning in the PSET system.

4.4 Outcome 4 - Developing the National Open Learning System (NOLS) for post-school education and training

The White Paper emphasised the centrality of technology in the deployment of open learning. Although a plethora of open learning materials are available online both from international and national institutions, organisations, private sector and individuals, most of these materials are not contextualised for the South African student/qualifications and are, in most cases dependent on high bandwidth and modern devices. The DHET must commit to providing free access to relevant quality open learning materials.

Therefore the DHET will develop, in collaboration with the State information technology Agency (SITA) a NOLS that is flexible enough to accommodate low bandwidth and shared devices, to name only two of the challenges. It is foreseen that the following procedural and technical functionality will be available:

- Provide a platform for integrated open learning integrating theory, practice and work-integrated-learning (WIL);

- Provide a platform for hosting of high-quality, modular, self-directed learning materials (as open educational resources);
- Provide open and free learning opportunities;
- Provide access to qualifications and part-qualifications through open learning;
- Provide access to student support mechanisms;
- Provide assessment opportunities at the beginning and end of each module (summative), as well as formative assessment throughout the modules;
- Assist students and prospective students with open registering for access to learning opportunities;
- Assist students and prospective students in registering for formal assessment (closed);
- Administer and certify student achievement and progression;
- Store student achievements to be accumulated and recognised for formal qualifications;
- Provide a course developer interface where registered course developers can develop courses on NOLS, and
- Provide an assessment result interface where assessors can record the assessment results of practical work and work-integrated learning.

It is foreseen that the system will be developed in a phased approach, with access to open learning materials by the end of 2018/9 and will be in full operation by the end of 2019/20.

4.5 Outcome 5: Developing open learning courses/programmes

Based on the development of NOLS (outcome 4), the DHET will develop open learning programmes/courses in the programme areas identified through consultation. This outcome sees the implementation of a robust, contextualised (both for infrastructure and human needs and challenges) NOLS and the development of institutional capacity to develop and deliver courses in the proposed programme areas. Integral to this outcome is the development of high quality learning materials that will be published as Open Educational Resources (OER).

Four primary criteria has been/will be used to identify development priorities. These are:

- Development of materials should prioritise programmes/courses associated with an existing qualification/part-qualification;

- Existing materials (OER) should be available for adaptation;
- There must be providers who are already offering the qualification; and
- A baseline must be available or possible.

The following courses/programmes have been identified for the first phase development:

- Occupational Qualifications registered by the QCTO. The first development will be for the 'National Occupational Certificate for Electricians' followed by other priority trades ranked by the accelerated implementation of QCTO Qualifications. At least 2 programmes will be developed by 2018/9.
- 'Online Diagnostic Tests and Preparation Programme for South African TVET College Students'. This is not a qualification, but a part of the TVET college's priority programme for admission into TVET colleges. This will include the development of an Interest Questionnaire for prospective TVET colleges' students. This will be completed by 2016/7.
- Materials development in 4 subjects for the NASCA. This will be completed by 2019/20.
- Materials for the Occupational Certificate: Career Development Information Officer. This material will be completed by 2019/20.
- Materials for 2 courses for the development of TVET college lecturers through open learning. This will be completed by 2019/20.

As part of the development of the materials, capacity will be built for the development and delivery of open learning in institutions. The Directorate: Career Development and Open Learning will work with the relative branches in this continuous activity.

4.6 Outcome 6 - Collecting case studies on the application of open learning in post schooling that can be shared amongst countries

In the execution of the first five outcomes, case studies will be published in support of the implementation of open learning in PSET in South Africa. For the purpose of the outcome, research will also be commissioned. This will be a continuous activity. At least 2 case studies will be published per year from 2016/7.

These case studies will not only be shared nationally, but South Africa will also contribute to the international knowledge base of open learning (see reference in the White Paper p54).

It emphasises the international exchange of research, in particular, distance education across Southern African borders is strongly endorsed in the government-ratified SADC Protocol on Education and Training, and actively pursued by governments and providers within the region.

4.7 Outcome 7 - Coordinating and researching the use of Open Education Resources (OER) in post school education and training

Governments worldwide are progressively more requiring that educationally useful materials developed with public funds be made available under open licences. The following activities are associated with outcome 6:

- 4.7.1 Identify a range of critical issues/areas in the DHET that can be addressed through OER;
- 4.7.2 Develop and share models using OER in post school education and training;
- 4.7.3 Develop and share different business models for the procurement/development of learning materials;
- 4.7.4 Analyse the legislative and policy environment relating to OER;
- 4.7.5 Develop an advocacy and communication plan to:
 - Promote the use of OER in post school education and training;
 - Clarify licence frameworks in post school education and training;
- 4.7.6 Establish an OER Forum to promote the use of OER in post school education and training;
- 4.7.7 Collaborate with other government departments on the use of OER; and
- 4.7.8 Conduct an audit of publically funded materials in the Department of Higher Education and Training that can be made available as OER.

For the potential of OER to be realised, it is imperative that educators are able to find OER easily. DHET should play a role in facilitating this process, in the TVET college sector, through the proposed South African Institute for Vocational and Continuing Education and Training (SAIVCET), and at university level through a "reformatory" (rather than a repository), possibly through the existing pan African OER Africa Initiative.

Work should be undertaken to collect and compile all available OER in the post-school sector. This includes harnessing existing content within SETAs. The process of creating a referatory will facilitate access to a range of publicly funded materials. It is suggested that DHET negotiate with other government departments to make their learning materials available for use.

4.8 Outcome 8 - Supporting an institutional network to take forward open learning

Taking forward an open learning agenda will be uncharted territory which will require on-going dialogue around new opportunities and lessons learnt. Policy makers and practitioners will need to come together regularly to engage with each other and chart new roads. There already exists an association of open learning organisations – NADEOSA (the National Association of Distance Education and Open Learning in South Africa) – which would be highly suited to play this role. It is recommended that this institutional mechanism be supported to play this vital role of providing a platform for sharing and critically evaluating experiences in opening learning. The DHET also has to participate in national and international forums such as the Distance Education Association of Southern Africa (DEASA) and others.

4.9 Outcome 9 – Developing a model of distributed learning

It is crucial that some forms of providers, are tasked with managing distributed learning programmes. Such central bodies would have responsibilities for ensuring that:

- relevant teaching and learning materials, including a range of innovative learner activities, are developed, produced and disseminated;
- tutors are recruited, and trained: that their work is carefully supervised and monitored;
- appropriate assessment strategies are developed, probably through the development of a portfolio of activities;
- formative assessment tasks are received, moderated and managed so that learners receive useful feedback;
- the necessary logistics – such as distributing materials –are efficiently conducted;
- the implementation of initiatives are carefully, monitored; and

- data is collected and verified. This need exists whether or not a distributed programme uses face-to-face tutorials or online support.

The emphasis needs to be on establishing the functions of such providers. In particular, there will be a need for a central body to manage the roll-out of NASCA and the associated challenges of implementing a new, large scale and distributed programme. The requirement to complete site-based assessment tasks (practical tasks) and work integrated learning assessment for students who are enrolling in occupational qualifications and the National Senior Certificate must be an integral part of this model.

4.10 Outcome 10 – Organising a network of technology-enabled centres and providers

An important way to accelerate the provision of PSET opportunities is to re-conceptualise the nature of provision, away from reliance on large buildings often located far from prospective learners, and towards a decentralized network of providers and centres. For such a network to thrive, a functional technology infrastructure is essential. This includes learners having easy access to the necessary connectivity and devices so that they are able to participate fully in learning programmes and meet course requirements.

South Africa is now in the enviable position of having a number of under-sea fibre optic cables arrive at our coastline and the Tertiary Education Network (TENET) facilitating a South African Education and Research Network. Plans are in place for all university campuses to have access to high-speed internet. DHET should do whatever is required to extend this access to all TVET campuses, and evolving CET colleges, and to ensure that access to learning facilities is available to all students in the PSET. DHET should also join forces with all educational providers to ensure that devices become increasingly affordable.

Even with the appropriate infrastructure, issues around connectivity and availability of bandwidth can significantly constrain students from being able to participate in open learning programmes. For this reason, providers need to plan for and respond to the needs of students affected by these challenges.

As a first step, DHET should encourage institutions to share learning centres and to create Wi-Fi networks around those centres which can be accessed by registered students of any provider.

5. Funding Strategies

This Implementation Strategy activities are funded through European Union Sectoral Budget support programmes, viz.:

- Open Learning System for Post School Education and Training (R51 860 400); and
- Capacity Building of TVET College Lecturers through Open Learning (R30 000 000).

Further funding of R3 949 880 was made available through the National Skills Fund (NSF) Growth Fund.

The policy framework will include a detailed funding strategy for the implementation of the policy framework.

6. Monitoring and Evaluation

As this Implementation Strategy activities are funded through donor-funds, each project has a Project Steering Committee that monitors the outputs. Furthermore, there are mid-term and final qualitative evaluation processes in place to evaluate the implementation of open learning.

7. Way forward

The DHET will take forward the initiatives identified in this implementation strategy through the Open Learning Unit within the Directorate: Career Development and Open Learning.