

## UMALUSI CELEBRATES 10 YEARS OF ACHIEVEMENT

On 23 November 2011 Umalusi celebrated its 10th anniversary with an event attended by some 300 high profile guests, including Mr Bobby Soobrayan, Director-General in the Department of Basic Education.

Umalusi CEO Dr Mafu Rakometsi said he was delighted to welcome the guests to celebrate Umalusi's achievements of the past decade.

He reminded guests that 10 years ago in 2001, almost to the day, the General and Further Education and Training Quality Assurance Act (No 58 of 2001) was promulgated, which saw the founding of Umalusi. Dr Rakometsi quoted the late Professor Kader Asmal, then-minister of Education, who said in his keynote speech at the official launch of Umalusi: "But of course we also need, as the final stage in a total quality assurance cycle, an external and independent body to verify the credibility of our internal quality processes ... that is the reason for the creation of Umalusi ..."

Dr Rakometsi mentioned that such a celebration was important in that it presented an opportunity for Umalusi to reflect on both its past and its present, and also to focus on where Umalusi was going in the next 10 years.

He told the audience that Umalusi Council had weathered many changes since its inception, citing as an example that the Council had barely been established when the review of the National Qualifications Framework (NQF) commenced. The review of the NQF was finalised in 2007 and the NQF Act, promulgated with amendments to the GENFETQA Act, impacted substantially on the Council's mandate and work.

Dr Rakometsi also reminded the audience that the period 2001-2011 marked the terms of three Councils. In this period, there were four Ministers of Education – Professor Asmal was followed by Minister Naledi Pandor and, more recently and as a result of the split in the Education Ministry, with Minister Angie Motshekga overseeing the Department of Basic Education and Dr Blade Nzimande the Department of Higher Education and Training.

Dr Rakometsi said that it was during this time that Umalusi undertook the development of a sub-framework of qualifications, established its quality assurance processes and undertook the quality assurance of two new qualifications, the National Senior Certificate and the National Certificate Vocational, both of which serve substantial numbers of learners in the system. It had also developed and implemented accreditation approaches and systems for private providers of education and training, and assessment. He said certification systems were



**Standing(L-R): Prof Divya Singh (Deputy Chairperson: Umalusi Council); Dr Raymond Patel; Prof Daniel Kgwadi; Ms Lindeka Mlanjana; Mr Albert Mocke; Dr Zilungile Sosibo; Prof Timothy Dunne; Prof Relebohile Moletsane; Mr Sandile Ndaba; Mr Ahmed Essop; Prof Magdalene Fourie-Malherbe; Mr Samuel Isaacs; Ms Fathima Dada**  
**Front Row(L-R): Mr Bobby Soobrayan (DG: Department of Basic Education); Prof Sizwe Mabizela (Chairperson of Umalusi Council); Dr Mafu Rakometsi (Umalusi CEO)**

developed to support the qualifications for which Umalusi was responsible, and a robust research programme was initiated.

In closing, Dr Rakometsi said that notwithstanding the relatively short period, Umalusi had come a long way in achieving notable successes in its areas of responsibility.

Delivering his message, the chairperson of Umalusi Council, Professor Sizwe Mabizela, said in the past 10 years Umalusi had grown into one of the most important organisations in South Africa's education and training landscape. In that time Umalusi was proud it had built a reputation for efficiency, good governance and tightly researched positions on key issues and as the final word on fairness and quality in the sector for which it is responsible.

Professor Mabizela added that this success was supported and underpinned by good governance – there were few organisations in the private or public sectors able to claim that they had received unqualified audits for the entirety of their existence. He said he was honoured that Umalusi stands tall among these proud few.

In closing, Professor Mabizela said Umalusi believed that every institution can improve, and every process can be refined. Over the 10 years of its life, Umalusi had proved repeatedly that it is "an organisation at war with mediocrity".

"Having guarded the standards of schools, colleges, and

adult education these last 10 years, Umalusi is able to look back with pride on what it has been able to achieve so far. That is not to say we can allow ourselves to become satisfied or complacent, or judge our own performance uncritically. Indeed, as we begin the process of setting the standards for the General and Further Education and Training sector, we are actively seeking out criticism, and well-founded judgements, on what we could have done – and can still do – better".

Mr Soobrayan, representing the Minister of Basic Education, apologised on her behalf and extended the Minister's heartiest congratulations to the Chairperson and members of Council, the Chief Executive Officer and the staff of Umalusi, for attaining this significant milestone in Umalusi's young history. He said that the first 10 years of any organisation were the most critical and challenging and, therefore, Umalusi can be justly proud that it has sailed through relatively uncharted waters and established a strong presence in the South African education and training landscape.

The Presda Primary School choir entertained the guests as they arrived at the venue, while a band played when dinner and drinks were served. The event culminated in the cutting of a 10th birthday cake by Professor Mabizela, which was served to all the guests.

The Deputy Chairperson of Umalusi Council, Professor Divya Singh, officially closed the event. 🎉



# UMALUSI 2012 CONFERENCE IS JUST AROUND THE CORNER

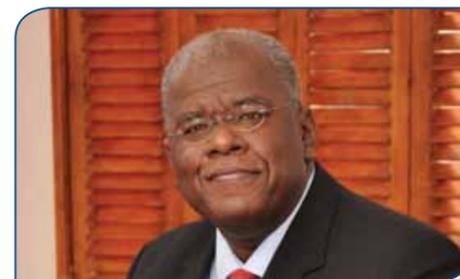
The Umalusi 2012 Conference is almost upon us and all of Umalusi is gearing up to welcome our national and international delegates to this prestigious event. From 10 - 12 May 2012, respected academics from around the world will converge at the Misty Hills Country Hotel to discuss the latest scholarship in the field of standard setting and quality assurance. Some of the leading lights of the academic world will be attending, among them our renowned keynote speakers Professor Jonathan Jansen, Professor Catherine Snow, and Professor Michael Young. Professor Jansen will deliver a keynote address focusing on the pathways into higher education and ways of increasing equity. Professor Snow will examine language, literacy and the needs of the multilingual child – a topic on which she is a world-renowned authority. Professor Young will explore a knowledge-based approach to vocational education.

It is not just the keynote speakers who are set to impress. We have speakers and delegates from Australia, India, the United States, Hawaii, and from across the African continent. This truly international event places Umalusi on the centre stage of

academic debate and cutting edge research in our sector. Preparations for this grand event have kicked into high gear at Umalusi, and many Umalusians are hard at work organising every aspect of this conference.

As the time of the conference draws near, Umalusi is looking forward to making new connections with academics in our sector from around the world, as well as renewing friendships with trusted colleagues. The conference programme is packed with more than 80 speakers, delivering the latest research on standards and standard setting, language and curriculum issues, assessment techniques, and a vast array of relevant topics. Umalusi is expecting in excess of 250 delegates at this event, and we recognise the great privilege we have been given in being able to organise such an occasion. 

Remember to register for the conference by visiting [www.umalusi.org.za](http://www.umalusi.org.za) before 31 March 2012  
For more information contact Frank Chinyamakobvu at  
Tel: 012 349 1510 or Email: [frank@umalusi.org.za](mailto:frank@umalusi.org.za)



**Professor Jonathan Jansen: Vice-Chancellor and Rector of the University of the Free State**



**Professor Catherine Snow: Henry Lee Shattuck Professor of Education - Harvard Graduate School of Education**

## STRENGTHENING HANDS AND THOUGHTS: UMALUSI/SETA WORKSHOP

Representatives from Umalusi and the Sector Education and Training Authorities (SETAs) enjoyed discussion time at a workshop hosted by the Qualifications Curriculum and Certification (QCC) unit. Besides strengthening relations with the SETAs, the purpose of the workshop was to increase awareness of Umalusi's alternative model for standard-setting in a large-scale, national context. Advocating the General & Further Education and Training (GENFET) qualifications framework and ensuring a clearer understanding of the mandate and associated responsibilities also received attention.

Ms Eugenie Rabe explained Umalusi's mandate in respect of colleges and adult learning as determined by the National Qualification Framework (NQF) Act 67 of 2008. She referred specifically to the responsibility to develop and manage a sub-framework of qualifications for general and further education and training and to make recommendations to the Minister. The discussion included remarks about the development and implementation of quality assurance policies for the framework. Ms Rabe mentioned that, as determined by the GENFETQA Act 58 of 2001 (amended 2008), Umalusi is mandated not only to maintain the sub-framework but also to assure quality assessments at exit points, certify learner achievements and quality provision by private providers of education and training. In addition it is mandated to accredit private assessment bodies.

Umalusi's senior managers had the opportunity to contextualise Umalusi's mandate by presenting an overview of the unit's responsibilities and workflow. The attendees were surprised to learn that all of Umalusi's views, positions and recommendations were research-based. They verbalised their astonishment at the sheer scale of quality assurance of large-scale assessment and the intriguing process of certification. They were grateful to learn about the verification role Umalusi is also fulfilling.

Ms Liz Burroughs explained Umalusi's **model for setting standards**, the importance of qualifications and the centrality of the

curriculum. Coming from a unit-standard environment, the discussion about the curriculum being central to determining standards brought new insight to Umalusi's approach, which requires an understanding of the intended examined curriculum. Understanding the enacted curriculum, though, has been a difficult area to be involved in, but it has become possible with the changes to the Act.

Dr Celia Booysse defined the nature of the General and Further Education and Training Framework and interpreted its function as one of the three sub-frameworks. Reference was also made to how permeability among the three sub-frameworks (GFET, Recognition of Prior Learning (RPL) and CAT) could be facilitated.

The role of the National Certificate Vocation (NC(V)) in the education and training system, Umalusi's approach to review, and the question of whether there is a place for the NC(V) and Nated (N-courses) in the FET colleges received prominent attention.

Ms Rabe consistently reminded the attendees that the NC(V) and N-courses function in different ways. She led the discussion specifically to keep in mind the different structures, delivery models and purposes of the qualifications. NC(V) is a full programme that leads to an end-of-school qualification (providing general vocational education), whereas N-courses are part qualifications that offer short-term, intensive opportunities to learn and 'face both ways' for partial credits. Based on research conducted, especially in the engineering field, Ms Helen Matshoba presented how the N-courses could best fit into the national qualifications picture. She also referred to a case study as part of the empirical work done in the research, and the need learners expressed during an interview to receive quality education in a flexible mode of delivery.

A lively discussion followed the presentation by Dr Booysse on the General Education and Training Certificate (GETC) for adults.

It was made clear that an understanding of adult education concepts is a prerequisite to describing adult learning, and the adult learner especially, because adults' orientation to learning is life-centred.

The attendees confirmed from experience that the following difficulties had been identified within the adult education system:

- poor learning environments;
- time constraints and an irrelevant/overloaded curriculum;
- incompetent or ill-equipped educators (teaching resources and professional development activities must be improved);
- the need for consciousness in education;
- time frames to complete the qualification;
- poor learner attainment and retention.

Members of the audience applauded recommendations to pursue efforts to ensure adult learning as a continuum, from initial enliteration through to providing access to work and/or further study. The audience appreciated the argument for the progression of qualifications and curricula not as isolated instances, but as a deliberate strategy to cater for the demands of adult lives and interests, which may include ways for the acquisition of learning to be formally recognised.

The attendees agreed that good national curricula for adult learning will:

- strengthen the quality of learning and assessment;
- provide a firm basis for the development of textbooks;
- underpin the professional development of adult educators.

Many of the attendees had further discussions in small groups outside the venue – evidence of the deepened interest in the topics and presentations. Requests for follow-up workshops confirmed the need for many more concepts to be clarified – an opportunity that QCC will certainly take advantage of in future. 

## LIFE ORIENTATION WORKSHOP

Umalusi is embarking on a project of evaluating the subject Life Orientation (LO) in the National Senior Certificate (NSC) and National Certificate Vocation (NC(V)) as Level 4 qualifications. The project envisages including an evaluation of the intended curriculum as well as its accompanying assessment.

**The evaluation will be structured in three parts, which are as follows:**

- NSC-NC(V) comparison – compare the different assessment structures of LO within the two qualifications and establish the comparability of the curricula for the purpose of credit transfer.
- The application of the LO curriculum and assessment across the various assessment bodies for the purpose of maintaining/setting standards.
- Curriculum and Assessment Policy Statements (CAPS) – quality assurance of the Life Orientation CAPS.

As a first phase of the project, the Qualification, Curriculum and Certification (QCC) and Quality Assurance of Assessment (QAA) units jointly hosted a Life Orientation workshop for the various stakeholders involved in offering LO as an NSC/NC(V) subject. The workshop was held on 7 September 2011 at the Council on Higher Education (CHE) auditorium.



**Umalusi staff and delegates attending the Life Orientation Workshop**

A national coordinator for LO NSC – Department of Basic Education (DBE), a national coordinator for LO NC(V) – Department of Higher Education and Training (DHET), provincial coordinators for both NSC and NC(V), moderators for both the NSC and NC(V), a senior DBE official, and representatives from Eksamenraad Vir Christelike Onderwys (ERCO) were among the attendees at this thought-provoking discussion. The eager responses from attendees confirmed renewed enthusiasm for engaging with even more passion in LO as a fundamental subject. 

# FOURTH ANNUAL ADULT AND VOCATIONAL EDUCATION AND TRAINING (AVET) PROVIDER CONFERENCE, BIRCHWOOD HOTEL (BOKSBURG)

As a quality council, established under the National Qualifications Framework Act, 2008 and the General and Further Education and Training Quality Assurance Act, 2001 (as amended), Umalusi is required to promote quality improvement among providers of qualifications pegged on levels 1-5 of the National Qualifications Framework. Annual Adult Vocational Education and Training (AVET) provider conferences are one of the vehicles through which Umalusi promotes quality improvement among providers. Accordingly, Umalusi hosted its fourth AVET provider conference.

About 180 delegates attended the conference, including two Council members, Mrs L Mlanjana and Dr ZC Sosibo. The theme of the conference was 'Rethinking the post-school sector: qualifications, delivery and work'.

The theme was influenced by Umalusi's vision for post-literacy, post-compulsory and post-school education and training. In terms of this vision, Umalusi is constantly seeking ways in which its work could respond appropriately to the needs of out-of-school youth and adults, both employed and unemployed, including learners in adult education and training, further education and training, and education after schooling. This is in light of worrying levels of poverty and unemployment in this country.

In his opening address, Dr Mafu Rakometsi, the Chief Executive Officer of Umalusi, challenged delegates to pause and reflect quite carefully on the post-school sector, from all possible perspectives, with a view to exploring viable intervention strategies or approaches that are likely to enable the AVET sectors to rise above the challenges confronting education, training and skills development in the post-apartheid South African system.

**... countries in the developing world have high expectations that the private sector will play a major role in VET reform.**

In her keynote address, Dr Muriel Dunbar, from Cambridge Education, explored what she referred to as the growing interest from various governments in Vocational Education and Training (VET). In this regard, she looked at similar policy reforms or initiatives in South Africa, Korea, Bangladesh, Turkey, Finland, China and India.

She also indicated that countries in the developing world have high expectations that the private sector will play a major role in VET reform. In her concluding remarks, she noted that VET continues to grow in importance as its contribution to economic growth and social stability becomes more evident.

She further indicated that this growth would mean another expansion in the private training sector as the state struggles to cope with demands for high-quality provision across a wide subject range.

She stressed that this growth must be accompanied by a government strategy to create systems that make sense for both public and private provision.

## Considerations for qualifications and curriculum

This sub-theme should be understood within the context of



**Dr Muriel Dunbar: Cambridge Education**

Umalusi's work in setting standards of provision in general and further education. The main organising fields for Umalusi's quality assurance approach are qualifications and their related curricula.

Speaking on this sub-theme of the conference, Professor J Muller, from the University of Cape Town, called for the need to close the gap between qualification types and variants that are pegged at different levels of the National Qualification Framework (NQF).

The gap was referred to by Professor V Wedekind (from the University of KwaZulu-Natal) as boundaries and borders or unintended stratification of the NQF. He argued that articulation should mean that learners are able to conveniently transfer from the vocational education path to the academic path; hence the need for an effective partnership between universities and Further Education and Training (FET) colleges. In making a related point,

**The National Senior Certificate represents one of the most important milestones in a learner's educational career.**

Professor Wedekind argued that universities, including those of technology, have not embraced the NQF, as they have not entered into discussions around unit standards, automatically creating difficulty for any form of progression from unit standard-based qualifications to higher education.

The envisaged partnership was further highlighted by Professor H Nel from the Nelson Mandela Metropolitan University, a comprehensive university offering qualifications

from certificates to post-graduate degrees and even PhDs. Her university started an FET/Higher Education (HE) interface initiative in 2010.

Dr Ronel Blom, from Higher Education South Africa, highlighted what she considered to be a sense of powerlessness, vulnerability and hopelessness in many Black households whose members are unemployed. She was particularly concerned about the over 1 million youth who need a second chance in life or alternative opportunities.

Further, it was her contention that Technical and Vocational Education and Training (TVET) institutions should be seen to be playing a critical role in addressing the problems. Mr Cosser, from the Human Sciences Research Council, proposed the extension of basic education to grade 11, and by extension, the issuing of a grade 11 exit certificate. Learners who are academically inclined will proceed to grade 12 and then to post grade 12 education.

## Considerations for the world of work

Under this sub-theme, Mr Shakeel Ori, from the Durban University of Technology, asserted that experiential learning is a strong basis for a solid relationship between industry, TVET and communities. He further argued that workplace learning is not just about hand skills but should also include thought processes, i.e. management skills and problem-solving. Mrs H Brown, from Mining and Engineering Sector Educational Training Authorities (MerSETA), presented her organisation's initiative, which she called the Accelerated Artisan Training Programme (AART). As part of the initiative, MerSETA forged a close relationship with employers, with a view to finding creative ways in which to accelerate the pace at which artisans are produced. In a related presentation, Dr Florus Prinsloo outlined how the National Assessment Moderating Body (NAMB), a functional unit within the Department of Higher Education (DHET), was established to enable the development and delivery of quality artisans to industry in a system of centralised control and decentralised delivery.

**... workplace learning is not just about hand skills but should also include thought processes, i.e. management skills and problem-solving.**

The primary function of the unit, he clarified, is to coordinate artisan development. In his closing remarks, Dr Rakometsi indicated that the pursuit of a seamless education, training and skills development system in this country could be enhanced through an effective partnership approach by government (through its departments), public and private providers, quality councils, and industry or workplaces.

In the main, the two-day AVET provider conference contributed meaningfully to an ongoing, important debate about feasible and effective approaches to challenges confronting the post-school education and training system in this country.

Perhaps the proposal (from delegates) of a 'broad-based' education, training and skills development indaba/ colloquium would advance the sought-after wisdom of Solomon, seemingly required for the nation to address its worrying levels of vulnerability, helplessness, poverty and unemployment. 🙏

# UMALUSI HOSTS A JOINT SEMINAR ON 'THREE YEARS OF THE NATIONAL SENIOR CERTIFICATE IN SOUTH AFRICA: IMPLICATIONS FOR UNIVERSITIES'

Umalusi, together with Higher Education South Africa (HESA) and the Higher Education Learning and teaching Association of Southern Africa (HELTASA), held a joint seminar at which the importance and high stakes of the National Senior Certificate (NSC) were discussed.

Professor Sizwe Mabizela welcomed delegates to this important seminar series, the theme of which was 'Three years of the National Senior Certificate in South Africa: implications for universities'. This focused on the experience gained from the past three years of the National Senior Certificate (NSC). The aim of the seminar was to review progress since the NSC was introduced in 2008, and to look at the implications and progress made by the learners at tertiary level.

In his opening remarks, Professor Mabizela said that this qualification represented one of the most important milestones in a learner's educational career, and that it was an essential tool in determining a learner's future educational or workplace opportunities. The introduction of the NSC also heralded, for the first time, all learners in South Africa being assessed using the same nationally set examination.

Professor Mabizela said that given the importance of this qualification, it should have come as no surprise that the NSC was the subject of intense scrutiny from all facets of society. He said that learners strove to pass the exams, while parents encouraged their children to put all their efforts into obtaining a good matric. He reminded the delegates that the media watched the qualification with intensity, while further and higher education institutions based their yearly intake on these exams.

He said that the NSC, given its relative recency and high stakes nature, required all education stakeholders to scrutinise it with great seriousness so that it might be properly used and interpreted, and so that decisions made on the basis of this qualification were well-informed.

Providing historical background, Professor Mabizela said

**... new structure had had far-reaching effects for the interpretation of learners' results, since all learners were now judged... on a single scale.**

that when the NSC replaced the Senior Certificate in 2008, it introduced radical changes to the structure of the matriculation examinations. Not least among these was the decision to do away with the stratification of the exams into higher grade and standard grade papers.

The NSC exams were constructed on the basis that all learners would write the same examination and the subsequent evaluation of their performance would be on the basis of the marks that they received, rather than on those mediated by a higher or standard grade pass. This new structure had had far-reaching effects for the interpretation of learners' results, since all learners were now judged on a single scale.

Just one implication of this, he said, was that the use of a single examination paper would necessarily mean that higher-performing learners wrote an examination with easier questions than they would have if they had written the previous Senior Certificate at higher grade. Conversely, lower-performing learners would unavoidably have been asked to answer more difficult questions. This, he said, meant that when interpreting the results of the NSC, the end-user of these results would have to make judgements based on a fundamentally different scale than had been applied previously. Professor Mabizela said that it was with

these challenges in mind that Umalusi had embarked on the 'Maintaining Standards Project' in 2008, to compare the standard of the NSC against the previous Senior Certificate, and to provide information on how the results of the NSC should be interpreted. While the reports of this project were initially aimed at Umalusi's Assessment Standards Committee to assist in the standardisation process of this new qualification for which no historical norms existed, it quickly became clear that the information provided had had a far wider application.

The 'Maintaining Standards Project' was thus followed by joint research, undertaken by Umalusi and HESA, to establish the status of the NSC in relation to international curricula such as the International Baccalaureate and the Cambridge International Examinations, among others.

While the NSC had compared favourably with international qualifications, it was clear to the researchers that one of the most pressing issues was accurate interpretation by receiving institutions of the NSC results.

In closing, Professor Mabizela said that it was in this context

**...one of the most pressing issues was accurate interpretation by receiving institutions of the NSC results...**

that Umalusi, HESA and HELTASA had come together to provide information on the NSC to improve the understanding by the university sector of this qualification. He believed that feedback from the universities about their experience with learners holding the NSC qualification was essential in evolving their concept of the South African matric. It was their belief that through collaboration and the free exchange of ideas, they would ultimately achieve the best results for the most important stakeholders in the education system: the learners.

Professor Mabizela urged delegates not to imagine that the NSC was seen only as a university entrance examination – far from it. Indeed, he said, the ambit of applications of the NSC was broad, and its use in determining entrance into university study was only one of the many functions this examination fulfilled. He said that as always time and available resources dictated that they tackle each of the interests in a progressive manner. This, he said, was the reason the focus was on the use of the NSC in the university

admissions and first-year arenas.

Questions that could be posed were:

What sorts of skills does the NSC require of learners who achieve an exemption?

Does the NSC curriculum articulate well with the first-year curricula of universities?

How could all stakeholders provide inputs that continue to streamline and improve this qualification?

Professor Mabizela said that he was hopeful that the two-day seminar series would go some way towards answering these questions.

In closing, Dr Mafu Rakometsi thanked delegates for participating, assuring them that the level of engagement at the seminar had been "exceptional". He believed the seminar had gone some way towards answering these questions. He also thanked the management of Unisa for providing the venue.

Finally, Dr Rakometsi thanked Professor Mabizela for setting the scene and mapping out the purpose of the seminar in his opening remarks and for urging all participants to use the seminar as an opportunity to critically reflect on the experiences gained by the system in respect of the NSC over the past three years.

In framing the seminar, he posed four questions, of which the following two stood out for him: (i) Does the NSC curriculum articulate well with the first-year curricula of the universities; and (ii) How could all stakeholders provide inputs that continue to streamline and improve this qualification.

Dr Rakometsi concluded by saying that all the contributions had inspired delegates to take up their country's educational challenges in the places where they could make a difference, whether these were in their own quality councils, institutions of higher learning, teaching enterprises, and so on.

He said he was also delighted that the seminar had not degenerated into a 'The boat is leaking on your side' type of syndrome, where universities would blame the schooling system and the schooling system would, in turn, blame universities for shortcomings.

He said that it was encouraging to note that they had taken collective responsibility for the challenges facing their country. 🇿🇦



Maintaining standards team leaders and Umalusi staff at the Umalusi/HESA/HELTASA seminar

# TOGETHER WE CAN DO MORE TO ERADICATE ILLITERACY

Adult education and training in South Africa has been plagued over the last decade by instability and a lack of vision. Civil society organisations concerned with Adult Basic Education and Training (ABET), have lost their voice amid the economic meltdown and the reduction in government and donor funding.

The voice of the most marginalised in the education sector in South Africa – those in Adult Basic Education and Training (ABET), out-of-school youths and adults, as well as those who wish to re-enter the education enterprise – has to a large extent been silenced. While the ABET Act of 2000 was promulgated 11 years ago, the sector has continued to operate as if in limbo. Many researchers have pointed out, with dismay, the deplorable state the sector is in.

Umalusi as a quality council has, through its interactions with government over the past 11 years in particular, managed to ensure that government improves on its delivery of the basic human right as enshrined in the Constitution: the right to basic education.

Ensuring quality adult education and training remains an ongoing debate and challenge.

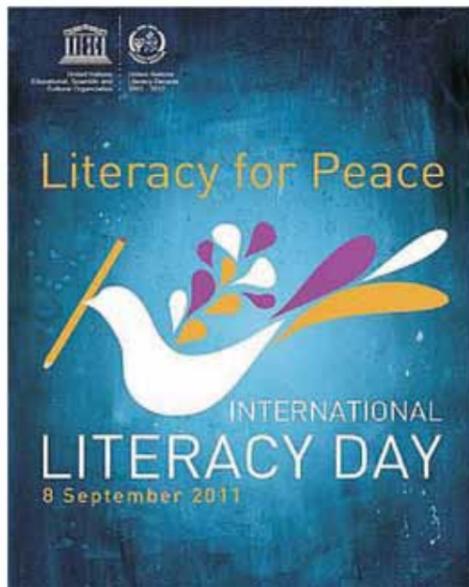
Under the auspices of the Department of Basic Education, the Kha Ri Gude Mass Literacy campaign has contributed to an increase in literacy rates among adults in this country. The Department of Higher Education and Training, responsible for the formal Adult Basic Education and Training (ABET) programme, also shares in this achievement. So, while one directly contributes to the reduction of adult literacy rates, the other indirectly ensures that the adult literacy rate is further sustained through offering a formal qualification.

South Africa has not done nearly enough to eradicate illiteracy in our country, but our efforts have not been in vain. Many, however, argue that we are just shifting the numbers, as can be seen in the increase in the number of functionally illiterate in the 2009 Education for All (EFA) Country Report: South Africa.

While many people around the globe celebrated the 20th anniversary of Adult Learner's Week from 1 – 8 September 2011, which culminated in the celebration on Thursday, 8 September 2011 of International Literacy Day, South Africa remained silent.

On this day each year United Nations Educational Scientific and Cultural Organisation (UNESCO) notes the global status of literacy – in 2011, some 800 million adults remained illiterate and 67.4 million children were not in school. The 2012 theme is Literacy for Peace, and a 'Writers for Literacy' campaign is promoting literacy through writers of international repute. SA's 1991 Nobel Prize winner for literature, Nadine Gordimer, contributed to The Alphabet of Hope anthology, with 'The Image and The Word'.

As we ponder on her argument that literacy is the basis of



all learning, we immediately have to face the reality of the effects of inadequate funding for achieving the Millennium Development Goals. South Africa, as well as the rest of the world, is constantly faced with the shortage of a skilled workforce that is not just literate, but also teachable.

While our economies are driven by manufacturing and the importing and exporting of goods and services, education has not been able to keep up with developments elsewhere. And while South Africa and the rest of Africa are still grappling with high levels of poverty and illiteracy, conflict and unrest, not to mention inequality, it remains to be seen whether we have the political will as a continent to drive out unnecessary evils. Whereas more funding would assist, it is not the solution.

We have to look within ourselves: those with the necessary skills, resources and time should stretch out their hands to help those who are in need of literacy and education.

Umalusi, through its vision for a post-school system, has conceptualised a sub-framework of qualifications for the general and further education and training sector.

It is hoped that this suite of qualifications will provide opportunities for further learning, not only to school-going learners but also to a large number of out-of-school youth and adults who are desperately seeking opportunities that might lead to higher learning or employment.

Umalusi is aware of the many challenges that beset the adult education and training sector in the country. However, Umalusi is resolute in its endeavours to ensure that our learners are given opportunities to improve and further their learning and, therefore, contribute

to the human resource development of our country and economy.

There is a collective responsibility placed on all stakeholders in adult education and training in the country to continually engage and support programmes and initiatives that have as their cornerstone the eradication of illiteracy in our country.

The overarching objective of Mandela Day is to inspire individuals to take action to help change the world for the better, and in doing so to build a global movement for good. Ultimately, it seeks to empower communities everywhere to "take action, inspire change, and make every day a Mandela Day".

In honouring the legacy of Tata Mandela, we are called to turn the illiterate population into a reading, learning one, by helping someone close to us: an illiterate grandparent, a trusted housekeeper or gardener, or a group of kids on the streets.

It is only when we put our differences aside that we are able to make a meaningful contribution in the lives of countless people desperately seeking a way out of illiteracy and poverty.

Let us celebrate the achievements made by many ABET learners, often under very trying conditions. Congratulations to all who celebrated Adult Learners' Week and International Literacy on 8 September 2011. To the unsung heroes and heroines, the ABET providers and Public Adult Learning Centres and facilitators of learning; those who continue to pursue issues of morality under difficult circumstances; those learners who have acquired learning area certificates and the full General Education and Training certificate against all odds: We salute you! 🙏



A learner concentrating on her studies

## UMALUSI PLAYS HOST TO A VISITING PAKISTANI DELEGATION

On 28 September 2011, Umalusi hosted 10 delegates from Pakistan who were on a fact-finding mission to learn about the critical role played by Umalusi as an organisation.

Dr Mafu Rakometsi welcomed the delegation of experts from Pakistani education, who came to explore the role Umalusi plays in the school education sector.

Dr Rakometsi delivered a presentation to the Pakistani delegation, outlining the organisational structure and the functions and mandate of Umalusi as a standards setter.

The Pakistani delegation thanked Dr Rakometsi for affording them the opportunity to benchmark and learn more about the practices and experience of Umalusi in setting standards in the South African education sphere. 🙏



Umalusi CEO (centre in red tie), and staff with the visiting Pakistani delegation

# UMALUSI “STANDARDISATION” PRESENTATIONS TO THE HIGHER EDUCATION INSTITUTIONS AND PROVINCIAL EDUCATION DEPARTMENTS

What started as a legal challenge turned into an opportunity for Umalusi to inform the public about the standardisation processes and decisions pertaining to the 2010 National Senior Certificate (NSC) examinations.

After Umalusi announced its approval of the NSC examinations in December 2010, the media and other bodies requested that Umalusi disclose which subject marks had been adjusted, and the quantum of these adjustments.

Umalusi turned down the request, arguing that the information was confidential.

The request to make the decisions public was made in terms of the Access to Information Act (PAIA).

This being unprecedented, and after consultation with external bodies, Umalusi disclosed the 2010 National Senior Certificate standardisation decisions, on 25 February 2011.

At the disclosure media briefing, it became clear that the public had limited understanding of how Umalusi standardises the NSC results.

This was the beginning of a road show by the CEO to visit Higher Education institutions and provincial Departments

of Education to present the standardisation decisions to universities and to school principals.

Senior managers, Mr Vijayen Naidoo, of Quality Assurance of Assessment unit (QAA), and Mr Emmanuel Sibanda, Statistical Information and Research Unit (SIR), have been instrumental in supporting Umalusi’s CEO in his presentations to the following higher education institutions: University of Cape Town, Wits University, Walter Sisulu University, University of Kwazulu-Natal, Central University of Technology, Cape Peninsula University of Technology and the University of the Western Cape. 🇿🇦



**Dr Mafu Rakometsi, Umalusi CEO**



**Mr Emmanuel Sibanda, Senior Manager Statistical Information and Research (SIR)**



**Mr Vijayen Naidoo, Senior Manager Quality Assurance of Assessment (QAA)**

## UMALUSI WELLNESS DAY

On 14 October 2011, Umalusi hosted a staff wellness day with the theme ‘Cancer can be Beaten’. Dr Mafu Rakometsi, Umalusi’s CEO, opened the event with a presentation, which was highly educational, highlighting the effects of cancer and how people can play a role by reducing the risk of acquiring this dread disease.

Speakers from CANSA gave presentations to the Umalusi staff on various topics related to skin, prostate and breast cancer. After an informative

session, the staff were offered body massages as well as BP, cholesterol, and glucose testing, by Medi-Clinic nurses.

Presentations were well received by all members of the staff, and they pledged to go for cancer tests in future. At the end of the day, activities were provided for all 85 employees, with some lucky contestants winning prizes, which sealed the day as a success and a great investment in the health of Umalusi staff. 🇿🇦



**(Seated): Ms Khensani Motsi, Mr Phillemon Letlape (Umalusi staff) checking blood pressure during Umalusi wellness day.**



**Sister Sylvia Teffo of Medi-Clinic taking blood samples from Mr Eardley Twigg - Manager: Standardisation Quality Assurance of Assessment Unit (QAA).**



**Ms Shakuntla Khatri - Umalusi’s Training and Development Practitioner, being examined by an Audiologist from Hearsence, Ms Nerisha Naidoo and her assistant during the wellness day**

# UNDERSTANDING STATISTICAL MODERATION

The purpose of this document is to explain Umalusi's quality assurance processes with a particular focus on the moderation of mark distributions in national examinations. This process is called 'standardisation'. This document provides the rationale for standardisation and explains how it is done. Sharing this information forms part of Umalusi's commitment to making its processes transparent to all who have an interest in the examinations Umalusi quality assures and certificates.

One of the responsibilities of Umalusi, as South Africa's Quality Council for General and Further Education and Training, is to ensure that assessments and examinations of the qualifications it is responsible for are of the appropriate standard and quality. The qualifications currently quality assured by Umalusi are the following:

- The National Senior Certificate (NSC)
- The National Certificate Vocational NC(V)
- The National Technical Certificate – N3
- The General Education and Training Certificate (GETC)
- The Senior Certificate (SC) (the last SC examination will be offered in 2014).

These qualifications have prescribed components of both a) external assessment, which is nationally set, and b) internal assessment, which is set and assessed at the site level i.e. national examinations set by an assessment body and site-based assessments / continuous assessments set at the schools, colleges and adult learning centres.

The provision of national examinations is the responsibility of an assessment body, which may be an accredited private assessment body or the Department of Education. Assessment bodies implement various mechanisms, including the internal moderation of the standard of question papers, the training of markers and invigilators, the administration of examinations, checking of the marked scripts and internal moderation of the standard of marking, to ensure that the candidates' performances are fairly assessed according to the appropriate standard.

Umalusi, as the certifying body, quality assures examinations through the following processes:

- External moderation of the standard of question papers, to ensure that these satisfy the requirements as laid out in the curriculum and assessment policy documents of the qualification.
- Monitoring of the entire examination process, including monitoring the state of readiness of assessment bodies to administer the examinations, the conduct of examinations and the marking of scripts.
- External moderation of samples of marked scripts to verify that marking is consistent with the marking memoranda, and that marking is consistent across the various marking centres.
- Moderation of examination and internal assessment marks to ensure consistency of standards.
- Monitoring the resulting processes of assessment bodies.

## What is standardisation and is it necessary?

Standardisation is the moderation process used to mitigate the effect of factors other than learners' knowledge and aptitude on their performance.

The standardisation of examination results is necessary to take care of any variation in the standard of the question papers, which may occur despite careful moderation processes, as well as variations in the standard of marking that may occur from year to year. Other sources of variability include undetected errors and learners'



interpretation of questions. Standardisation is thus necessary to achieve comparability and consistency of examinations across years.

## Is standardisation unique to South Africa?

Standardisation is an international practice, and all large-scale assessment systems use some form of standardisation. The method used by the Cambridge International Examinations involves comparing the mean and standard deviations of the current exams with those of previous years.

This data is then used to 'set' the grade boundaries i.e. an A could be 80% and above in one year and could be set at 75% the following year, depending on the data. This system is also used by a number of African countries whose educational systems are still closely aligned with the Cambridge system. The method used in South Africa is that of 'norm- referencing'. The following sections outline the methodology and the principles underlying the methodology.

## What are the principles and assumptions underlying standardisation?

One of the main assumptions underlying standardisation is that for sufficiently large populations (cohorts), the distribution of aptitude and intelligence does not change appreciably from year to year, i.e. one can expect the same performance levels from cohorts of roughly the same size across time.

The standardisation process is based on the principle that when the standards of examinations (from one year to the next, or from one subject to another) are equivalent, there are certain statistical mark distributions, which should correspond (or be the same, apart from chance statistical deviations).

Statistical moderation consists of comparisons between the mark distributions of the current examination and the corresponding average distributions of a number of past years, to determine the extent to which they correspond. If there is good correspondence, it can be accepted that the examinations were of an equivalent standard.

If there are significant differences, the reasons for those differences should be established.

On occasion, these differences may be due to factors such as a marked change in the composition of the group of candidates offering a particular subject, poor preparations for the examination because of some disruption in the school programme, or very good preparation because of special support from educators. In the absence of valid reasons for the differences, it should be accepted that the differences are due to deviations in the standards of the examination or of the marking, and the marks should be adjusted to compensate for these deviations.

Some examples of where mark distributions should correspond:

- a) For each subject with a large enough number of candidates, a desired or expected distribution of marks is determined, which is called 'the historical average'. This is normally based on the raw marks (i.e. the unadjusted examination marks) for the examinations of the preceding three to five years. The distribution of the raw marks for the current examination is compared with the historical average.
- b) The internal assessment (continuous or site-based assessment) marks of candidates should correspond with the adjusted examination marks obtained in the examination by the same candidates in the same centre.

For example, if the average internal assessment mark for English in school A is more than 10% of the average adjusted examination mark for English in school A, then there is no correspondence and the internal assessment mark will be adjusted.

- c) The average of the marks obtained by the candidates offering a particular subject should correspond to the average of the marks obtained by the same candidates in other comparable subjects.

## UNDERSTANDING STATISTICAL MODERATION CONTINUED . . .

It is expected that these two averages should be more or less the same if the examination is of the appropriate standard.

For example, for a common cohort of candidates, the average marks obtained in Mathematics should be close to the average marks obtained in Physical Science and / or other related subjects. If the difference in the averages is significant, it is an indication that the standards of the question papers probably differ.

### How is standardisation achieved?

Standardisation of results is achieved at a meeting between the assessment body and Umalusi.

The assessment body presents its results after completing an analyses of its examination results, with a view to identifying any unexpected results, idiosyncrasies and cases deserving special attention.

The results are also examined in light of interventions that have been implemented in the teaching and learning process, shifts in learner profiles, and so on. The assessment body makes sure that it has a thorough understanding

of which adjustments will be appropriate, and what they would like to propose in this regard at the standardisation meeting with Umalusi.

The standardisation process compares the statistical distribution of the raw examination marks of the current examination with the predetermined historical average distribution of the last 3-5 years, and considers the adjustments required to bring the distribution of raw marks in line with the expected distribution, taking into consideration the comparative subject analysis and moderation, and marking reports. Umalusi will only consider adjustments where there is compelling evidence that it is necessary to do so, in which case the following may occur:

- a) If the distribution of the raw marks is below the historical average, the marks may be adjusted upwards, subject to the limitation that no adjustment should exceed half of the actual raw mark, i.e. half of what the candidate got, or 10% of the maximum marks for the subject.
- b) If the distribution of the raw marks is above the historical average, the marks could be adjusted downwards,

subject to the limitation in a), above.

Although it is clear that the statistical adjustment of marks to an agreed standard is by no means a perfect solution to the problem of year-to-year variations in the standard of examinations, it is currently more appropriate than a simple acceptance of the raw marks.

Taken in conjunction with the rectification of cases where the deviations from the standard are excessive, it offers at least a partial guarantee of comparability between successive examination standards, thus giving candidates equal opportunity over the years, regardless of the standard of the question paper that the candidates wrote.

It must also be noted that currently examination test items are not pretested and calibrated. It is hoped that as the assessment systems start to use pretested items, the need for standardisation at the back-end of the examinations will be minimal.

Finally, it must be stressed that mark adjustment cannot compensate for the effects of poor teaching or learning; its only purpose is to ensure equivalent standards are maintained across years for the different assessment bodies. 

## BASIC EDUCATION CONFERENCE FOCUSES ON IMPROVING ACCESS TO QUALITY EDUCATION

Teachers, principals, practitioners, and researchers involved with basic education will convene at the Durban International Convention Centre (ICC) from 2 – 4 April 2012 for the South African Basic Education Conference where they will debate methods that can improve quality of teaching, learning and leadership in the education system.

Presentations will focus on:

- Teaching, learning and assessment;
- Management and leadership in schools and districts;

- Systemic approaches to policy and planning.

The programme includes approximately 150 peer-reviewed oral and poster presentations carefully selected from the more than 400 abstracts received from teachers, practitioners and researchers.

Conference co-chairperson Professor Mary Metcalfe says a sound education system depends on much more than teachers and facilities. "The involvement of entire school

communities comprising parents, businesses, and non-government organisations is the glue that keeps various role-players together. We are looking forward to welcoming representatives of these sectors at this conference."

Visit [www.education-conference.co.za](http://www.education-conference.co.za) for more information about speakers and their topics, or to register online.

Enquiries: 012 816 9125 or [registration@education-conference.co.za](mailto:registration@education-conference.co.za) 

## NEW APPOINTMENTS AND PROMOTIONS



**Ms Faith Ramothale**  
Manager: Schools  
Evaluation and Accreditation



**Ms Khensani Motsi**  
Assistant Manager: Schools  
Evaluation and Accreditation



**Ms Rachel Tladi**  
Administrative Assistant  
Quality Assurance of Assessment



**Ms Helen Matshoba**  
Manager: Curriculum  
Qualifications, Curriculum  
and Certification



**Mr Ebriem Fillis**  
Assistant Manager  
Supply Chain Management and Assets  
Corporate Services



**Ms Phumla Molusi:**  
Administrative Assistant: Schools  
Evaluation and Accreditation