

UMALUSI



Council for Quality Assurance in  
General and Further Education and Training

# Standardisation of External Examination Results

Dr Mafu Rakometsi  
CEO: Umalusi

# Presentation outline

- Legislative context
- Mandate of Umalusi
- Rationale for standardisation
- Qualifications and components standardised
- Who standardises results
- Standardisation principles
- What informs ASC decisions?
- Dealing with differences
- Conclusion

# The legislative context

- Umalusi is South Africa's Quality Council (QC) for General and Further Education and Training, and it derives its mandate from
  - The General and Further Education and Training Quality Assurance (GENFETQA) Act, Act No. 58 of 2001, as amended, and
  - The National Qualifications Framework Act, Act No. 67 of 2008, as amended.

# The mandate of Umalusi

- The GENFETQA Acts and NQF assign to Umalusi the mandate to develop and manage its sub-framework of qualifications (NQF Levels 1 – 4).
- Umalusi carries out the mandate by
  - ensuring the development of qualifications and associated curricula as required for the sector,
  - accrediting providers to offer such qualifications and quality assuring provision,
  - quality assuring assessment and issuing certificates for learner achievements, and
  - conducting research, which constitutes the basis for the advice provided to the relevant Minister of Education.

# Standardisation: Empowering section

- Section 17A(5) of the GENFETQA Act empowers Umalusi to standardise examination results:
  - (4) “The Council may adjust raw marks during the standardisation process.”
- Umalusi has done this since it started work in 2002 having taken over from SAFCERT.
- Umalusi standardises the final exam results of all the assessment bodies (DBE, DHET, IEB & SACAI) that examine subjects linked to the qualifications on the GFETQSF (NQF Levels 1-4).

# The basis for adjusting learner results

- Standardisation is a practice that is used all over the world and its value lies in the fact that:
  - it mitigates the impact of factors other than the learners' subject knowledge, abilities and aptitude on performance,
  - it addresses 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,
  - it ensures comparability and consistency in learner performance across the various subjects within a given year and across years.

# The results standardised

UMALUSI



Quality Council for General and Further Education and Training



basic education

Department:  
Basic Education  
REPUBLIC OF SOUTH AFRICA

- National Senior Certificate (NSC)
- Amended Senior Certificate (SC(a))



higher education & training

Department:  
Higher Education and Training  
REPUBLIC OF SOUTH AFRICA

- National Certificate Vocational (NC(V))
- General Education and Training Certificate (GETC)
- National Certificate 2-3 (N2-N3)



SOUTH AFRICAN COMPREHENSIVE ASSESSMENT INSTITUTE  
SUID-AFRIKAANSE KOMPREHENSIEWE ASSESSERINGSINSTITUUT

- National Senior Certificate (NSC)
- General Education and Training Certificate (GETC)



- National Senior Certificate (NSC)
- General Education and Training Certificate (GETC)



# The standardised components

- The qualifications on the GFETQSF have two prescribed components:
  - internal component: set and assessed at site level
  - external component: set and internally moderated by assessment bodies and externally moderated by Umalusi.

| Qualification              | Internal | External | Total |
|----------------------------|----------|----------|-------|
| NSC - Subjects without PAT | 25%      | 75%      | 100%  |
| NSC - Subjects with PAT    | 50%      | 50%      | 100%  |
| NC(V) - Fundamentals       | 25%      | 75%      | 100%  |
| NC(V) - Core Subjects      | 50%      | 50%      | 100%  |
| NATED 190/191              | 40%      | 60%      | 100%  |
| GETC                       | 50%      | 50%      | 100%  |



# Who standardises results?

- The role of standardisation of exam results is assigned to the Assessment Standards Committee (ASC).
- ASC members are not employees of Umalusi; they are drawn from various universities and research institutions and are some of the finest minds in our country. They
  - are independent experts in different subject fields such as education, mathematics, statistics, languages, etc
  - have years of experience working in South Africa's general and further education and training system (schools, colleges and adult education and training)
- In standardising exam results, the ASC relies on well-established principles and approaches, which are a matter of public knowledge.

# Standardisation principles

- 1) In general, adjustments should not exceed 10 percentage points or the historical average (norm). That is:
  - a) No adjusted mark should be beyond the norm or historical average.
  - b) No adjustment should exceed 10 percentage points.
  
- 2) In exceptional circumstances, adjustments in excess of 10% (10 percentage points) may be considered and recommended to EXCO of Council for approval. This principle should be read in conjunction with Principle 1(a) above.
  
- 3) In the case of the individual candidate, the adjustment effected should not exceed 50% of the raw mark obtained by the candidate. This principle should be read in conjunction with Principle 1 above.

# Standardisation principles

- 4) If the distribution of the raw marks is below the historical average (norm), the marks may be adjusted upwards, subject to the limitations above.
- 5) If the distribution of the raw marks is above the historical average (norm), the marks may be adjusted downwards, subject to the limitations above.
- 6) The computer adjusted mark is calculated based on the above principles.
- 7) For those subjects with a practical component of 50%, raw marks could be accepted, unless there is strong evidence for an adjustment.

# What is the norm?

- The “norm” is defined as
  - the average of the total raw marks of the immediate past 5 comparator examination sittings, excluding outliers, in all qualifications, except for the NATED programme in which case the immediate past 6 consecutive examination sittings are considered.
- In cases where there are fewer than the stipulated number of examination sittings, the norm should be based on a minimum of three examination sittings.

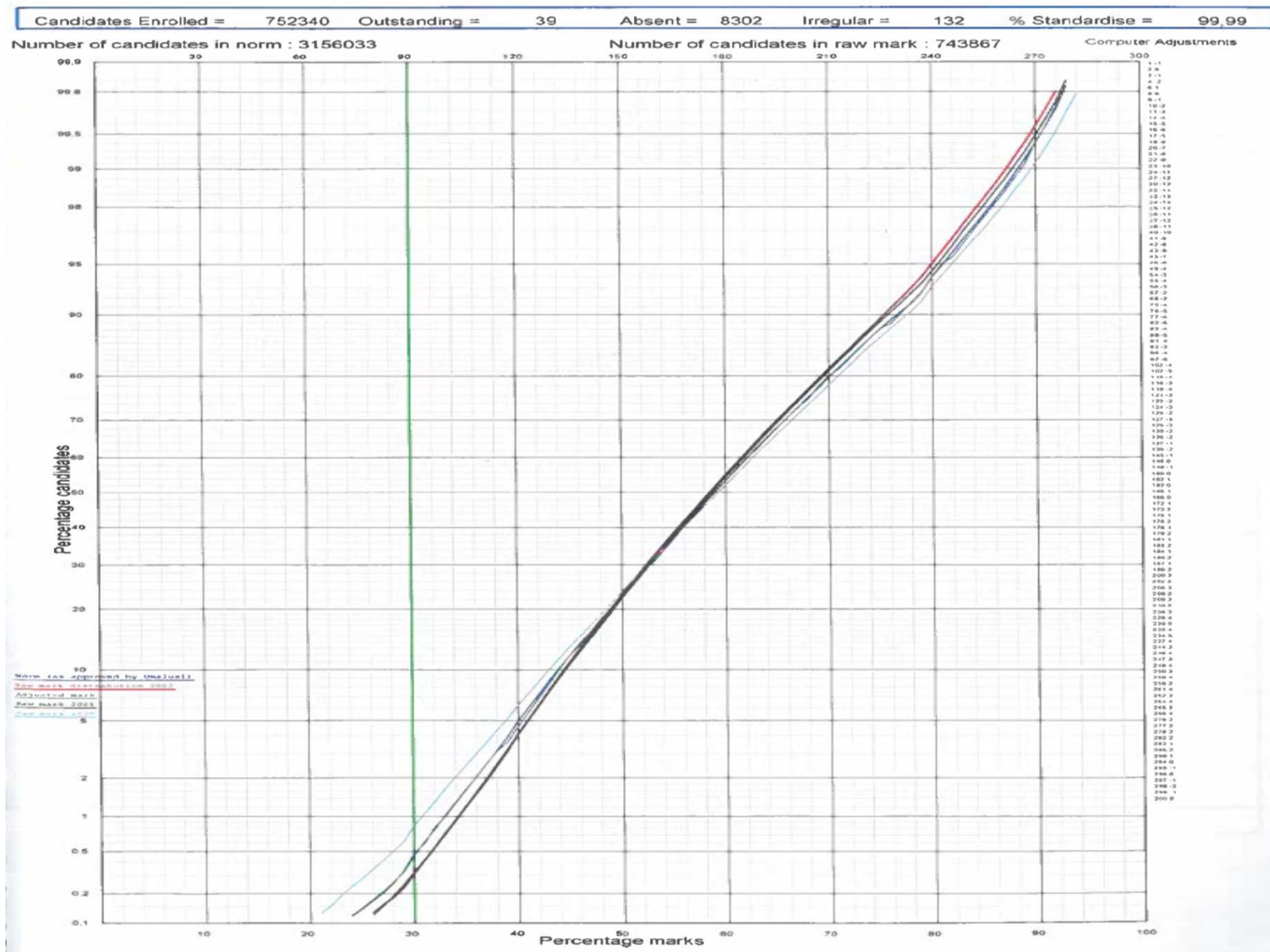
# What informs ASC decisions?

- The ASC spends considerable amount of time carefully analysing numerical and narrative reports to look for evidence to serve as the basis for its decisions.
- Amongst the reports considered are:
  - Evidence-Based Reports (EBR)
  - Statistical info (standardisation booklets)
  - Reports of internal moderators
  - Reports of external moderators
  - Reports of marking verifiers
  - Reports of chief markers
  - Reports from Post Examination Analyses - NSC
  - Any other relevant reports

# The questions of interest

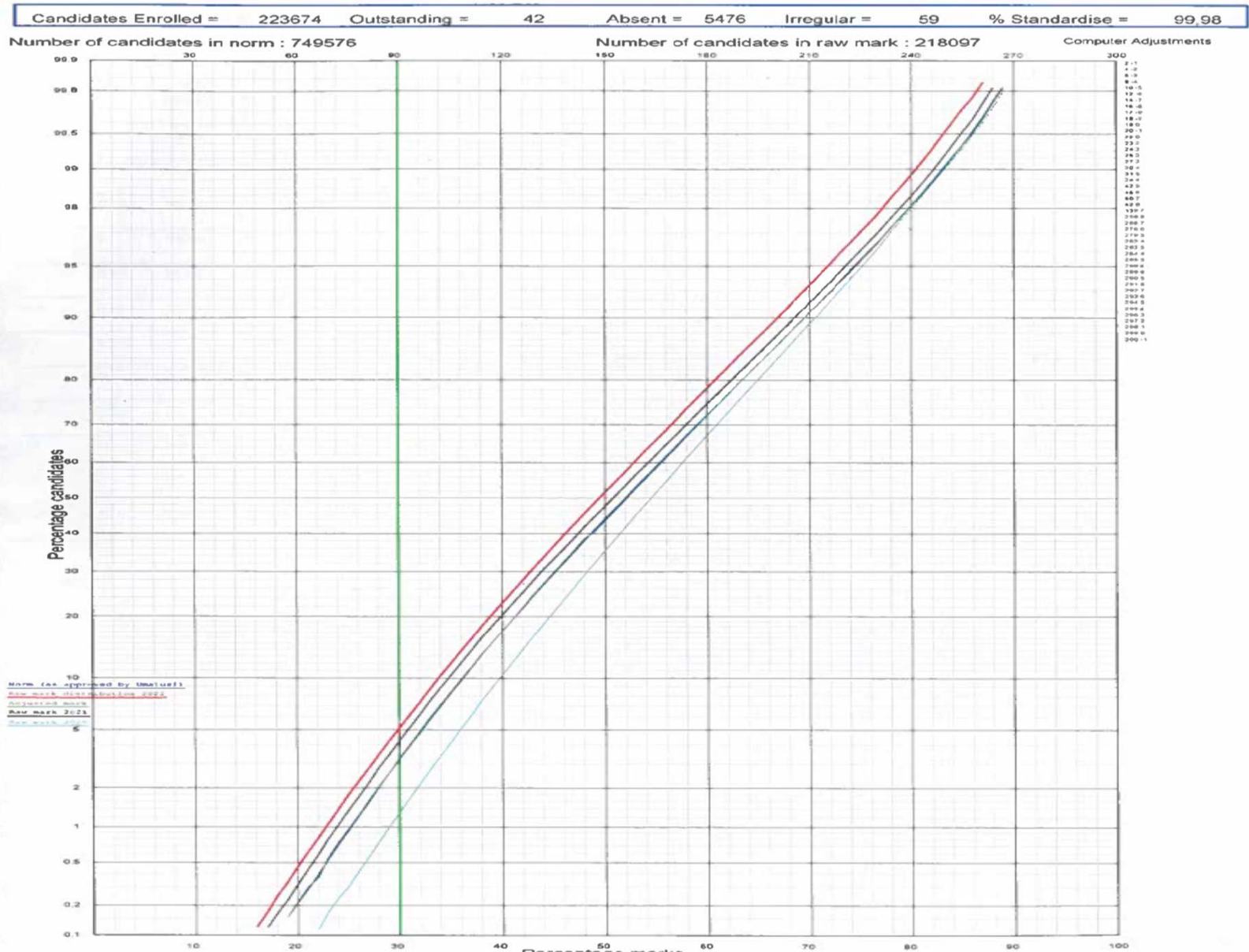
- The question of interest for the ASC is whether there has been any **significant, material** changes to the quality and standard of the examination in the current year relative to prior periods?
  - i. **Format and structure of the exam**
  - ii. **Content / topic specifications** (What is the overall effect of that on candidates' performance?)
  - iii. **Distribution of questions across cognitive demand** (Which cognitive demand / level is under - or over-represented- outside of the tolerable range? What is the overall effect of that on candidates' performance?)
  - iv. **Distribution of questions across difficulty levels** (Which level of difficulty is under- or over-represented - outside of the tolerable range? What is the overall effect of that on candidates' performance?)
  - v. **Overall standard and degree of comparability** of the current exam with previous ones.

# Accepting raw marks



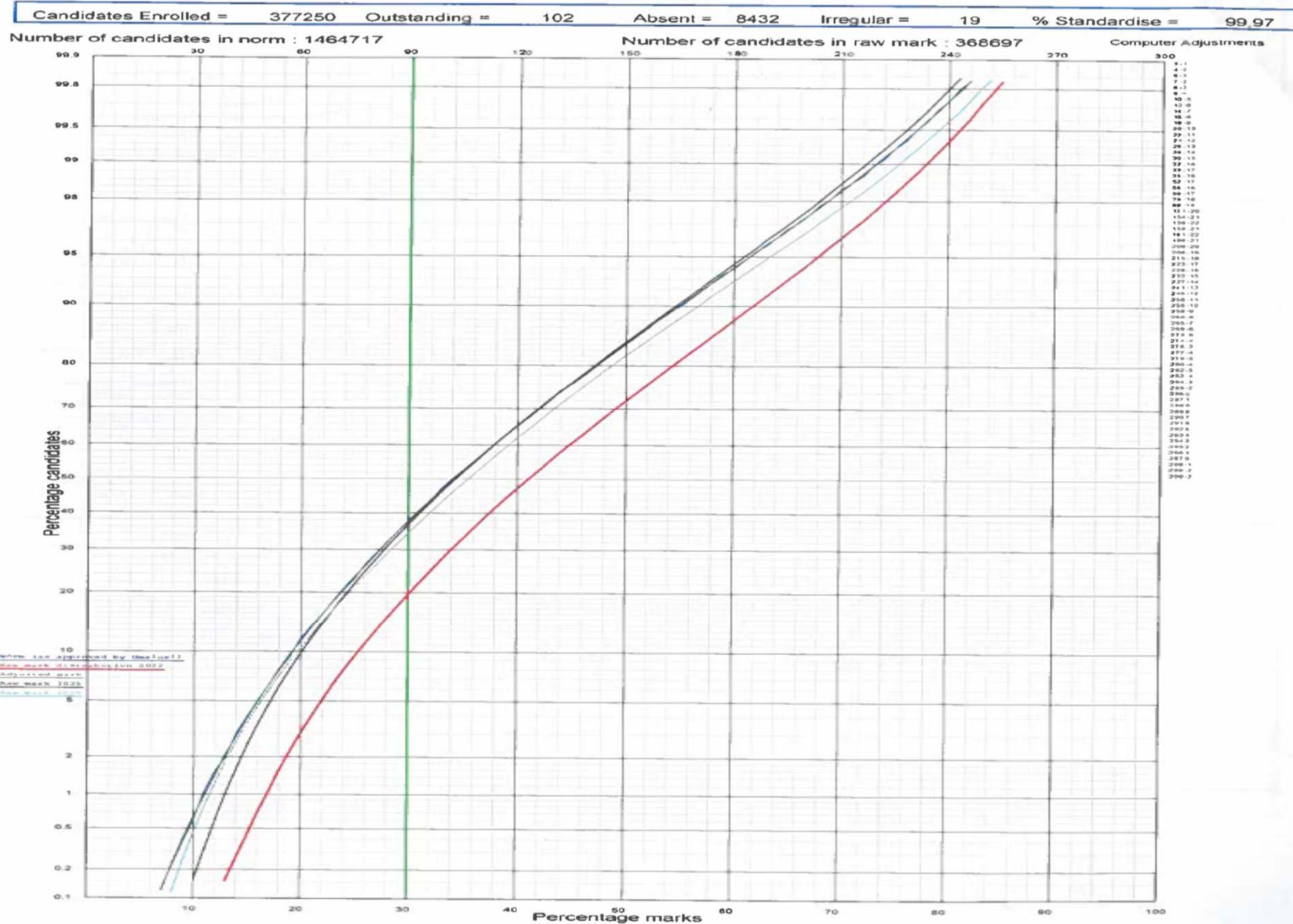


# Adjusting marks upwards





# Adjusting marks downwards



# Mechanism to deal with differences

- The standardisation process has built-in mechanisms for review and appeal to be used whenever an assessment body presents a proposal which differs from the decision of the ASC.
- The practice of “parking of subjects” is meant to allow an assessment body to gather new evidence and to strengthen the argument that it wishes to present to the ASC in motivation for an alternative proposal for standardisation.

# Demystifying the myths

- An improved pass rate is as a result of manipulation of figures by Umalusi's standardisation process.
  - Fact: It is not possible that Umalusi can gauge or foresee an increase or decrease in overall pass rates, or in pass categories because subjects are standardised individually, and the process is not iterative.
- The mainly upward or downward adjustment of marks involves the increase or decrease of learners' marks by the same mark from 0 – 300 or whatever the case may be.
  - Fact: Principle 3: "In the case of the individual candidate, the adjustment effected should not exceed 50% of the raw mark obtained by the candidate" – differing proportions
- Umalusi's task in standardising results is to implement decisions that are made elsewhere.
  - Fact: This is patently false. Umalusi performs its quality assurance duties free from any external interference.

# Defending the “currency”

- Based on the foregoing, it is clear that at the heart of Umalusi’s quality assurance mandate is the need to defend the currency of the certificates that it issues.
- It is for that reason that in adjusting marks Umalusi relies on consistently applied and defensible standardisation principles.
- This is because parents and learners rely on persistently applied educational principles to ascertain the reliability and validity of the results they receive.
- It is this awareness that gives such institutions and other stakeholders confidence in the results that appear on a learner’s certificate of educational achievement.

# Umalusi's 20<sup>th</sup> Anniversary Celebration

Umalusi Celebrated its 20<sup>th</sup>  
Anniversary During 2022  
Under the Theme:  
Two Decades of Education  
Guardianship. 2002-2022



Two Decades of Education Guardianship  
2002 – 2022