

# Designing and Delivering Distance Education:

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Quality Criteria and Case Studies  
from South Africa

EDITORS

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WITH

NADEOSA Quality Criteria Task Team



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# 1 | Section **ONE** context

## An Overview of Quality Assurance in Distance Education in South Africa

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### Introduction

Across the world, the quality of distance education varies enormously. On the one hand, we have an example of a distance education institution which in a particular country ranks amongst the leaders in all higher education for the quality of its teaching and learning. On the other hand, we have scurrilous distance education providers who take students' money, provide a miserable set of plagiarized notes, give no assignments, provide no learner support and, having wasted students' precious time, invite them to what is essentially a challenge examination. That there is such a wide range of practices in distance education is partly because distance education students find it so difficult to mobilize and complain, partly because the temptation to make money out of distance education programmes is great, and partly because the large numbers of students on many distance education programmes make it difficult to ensure that each student receives quality attention.

South Africa's recent history has shown both the potential and the difficulties of distance education. Robben Island became South Africa's first and arguably most successful learning centre during the long years in which many of South Africa's foremost leaders were

imprisoned there. But the success of that learning centre was not a result of a conscious institutional decision to provide support for its learners. The learners themselves took the initiative, supported not by tutors from the provider institution, but by volunteers who acted as messengers between institution, families and prisoners, to ensure that they progressed from course to course. As students during the eighties were wont to say: 'Under odds we will study, under odds, we will pass!'

In the ten years since our freedom, various efforts have been made to improve the quality of distance education – not in order to undermine the initiative of students, but to ensure that students do not have to spend so much time overcoming the extrinsic barriers to success (like not receiving their materials or assignment tasks in time) and can concentrate on the intrinsic challenges of learning (such as mastering the complexities of calculus, or understanding constructivist approaches to learning).

As will be seen, the National Association of Distance Education Organizations of South Africa (NADEOSA) has played, and continues to play, an important role both in the development of awareness of quality in the South African distance education community. It also engages with quality assurance bodies specifically appointed for the quality assurance of distance education, particularly higher education.

This overview will look at the following key questions for quality assurance of distance education that we have grappled with in the last ten years:

- What do we understand by quality in distance education?
- Should quality assurance be externally controlled or internally driven?
- Should quality assurance processes for distance education be integrated into quality assurance processes for all education?
- Can policy makers actively prevent bad practice while stimulating innovation and excellence?

## The importance of policy

Crucial to quality in distance education is a formal commitment to distance education by government. In South Africa we have been fortunate in this regard, especially as we moved into post apartheid South Africa.

The government-in-waiting's commitment to increasing access to education through the use of distance education methods was evident in the 1994 *Policy Framework for Education and Training* (ANC Education Department, Johannesburg):

The development of a well-designed and quality distance education system based on the principles of open learning is the only feasible approach to meeting the needs of the vast numbers of our people who were systematically deprived of educational opportunity in the past, while at the same time providing opportunities for the youth coming up through the educational system at present. It will allow people access to education and training and the ability to determine where, when, what and how they want to learn (ANC, 1994:78).

Even at this early stage, however, there was concern that in order to do this successfully, distance education provision had to meet certain criteria, such as:

well-designed courses, learner support, efficient administrative processes and appropriate organizational structures and evaluation procedures (ANC, 1994:77).

It was also clear that in order to ensure quality, which in turn would enable distance education methods to be used successfully for access, there had to be research into the state of distance education in the country. The ANC Education Department requested SAIDE to organize an International Commission to conduct a review and assessment of distance education in South Africa. In conducting its work, the International Commission, chaired by Prof. Gajaraj Dhanarajan, developed a set of criteria for what it termed ‘well-functioning distance education’. It then reviewed South African distance education against these criteria, as well as against the priorities for education and training, which were evolving for a liberated post 1994 South Africa. Thus a new impetus was given to a process for clarifying and refining what is meant by quality distance education in the South African context.

The new South Africa’s first White Paper on Education and Training of 1995 contributed to this refinement with an important distinction between open learning and distance education. Open learning, it was stated, was a set of principles that should apply to any educational programme:

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

As is reflected in this statement from the 1995 White Paper, the use of distance education methods can give ‘practical expression to open learning principles’. Thus a set of underlying principles for distance education was established.

The new government also commissioned an investigation of higher education, which intensified the emphasis on quality as success. In order to be successful, institutions not only had to increase access; they also needed to ensure that completion and throughput rates on programmes were high enough to merit the cost of mounting the programme. A distinction began to be drawn between ‘true’ distance education, which provided sufficient learner support for learners to succeed in their studies, and ‘correspondence education’ in which there was no face-to-face element in the course design at all. The policy research of the National Commission on Higher Education culminated in the policy statements in the White Paper on the transformation of higher education.

This White Paper, while noting its concern about ‘the efficiency, appropriateness and effectiveness of much current distance education provision’ (Department of Education,

1997:27), reiterated its commitment to distance education by endorsing the notion that:

distance education and on-campus resource-based learning have a crucial role to play in addressing the challenges of expanding access, diversifying the body of learners, being responsive to the needs of non-traditional students, for example, those already in employment or who need to earn in order to meet study costs, and enhancing quality within the context of limited resources (Department of Education, 1997:26).

The new South African government clearly anticipated that there would be, and indeed sought to encourage, massification of the higher education system. This, together with international trends towards lifelong learning, resulted in high expectations of the role of distance education in increasing access and cost-effectiveness.

Responding to its concerns about quality, it suggested:

that there is much work to do to re-focus institutional missions, modernize courseware, improve student support, and to undertake essential efficiency reforms and cost-effective planning so that quality of provision and performance is improved (ibid: 27).

## A framework for quality distance education

In 1996, the Department of Education, through its Directorate of Distance Education, Media, and Technological Services took the initiative in this ongoing work of improving the quality of distance education. The Department contracted a research team to assist with the development of a discussion document entitled *A Distance Education Quality Standards Framework for South Africa*.

The framework and approach to quality assurance contained in this document were based not only on an understanding of distance education provision in South Africa at the time but also on international experience. The mood of the progressive international literature at the time was best captured by the title of the quality assurance document of the Norwegian Association for Distance Education (NADE): *From External Control to Internal Quality Assurance* (Ljosa and Rekkedal, 1993). There were cautions about the role of standards – it was felt that they should encourage a process of continuous quality improvement, rather than merely prescribe a minimum. This could best be achieved through stimulating internal quality assurance processes in which institutions would evaluate themselves and set their own quality improvement agenda. Bureaucratic control according to set minimum standards, it was felt, would undermine the real goal, the internal drive to quality. In the South African document, this understanding was expressed as follows:

Standards for education should not (as legislation tends to do) merely prescribe a minimum, but give scope for continuous quality improvement (Department of Education, 1996:51).

The second point that was highlighted was the importance of stakeholder consultation – not only to ensure that the standards developed are accurate and sufficiently comprehensive, but also that those who are going to use the standards have ownership of them and, in the process of contributing to them, develop a shared understanding of how they should be



interpreted. As the relevant recommendation in the 1996 document states:

Guidelines/standards should be developed through a consultative process, so that they are both understood and accepted as valid by the people who will use them (Department of Education, 1996:51).

Taking the last point into consideration, a consultation process was arranged with members of the newly formed National Association of Distance Education Organizations of South Africa (NADEOSA). This consultation process culminated in a revised set of standards in a draft policy statement entitled *Criteria for Quality Distance Education in South Africa: Draft Policy* (1998).

The framework for the 1996 and 1998 documents was drawn from a range of international sources. The format for the standards/criteria was adapted from that used by the Scottish Vocational Educational Council (SCOTVEC). There are thirteen standards/criteria representing the main institutional elements for distance education provision:

- Policy and planning;
- Learners;
- Programme development;
- Course design;
- Course materials;
- Assessment;
- Learner support;
- Human resource strategy;
- Management and administration;
- Collaboration;
- Quality assurance;
- Marketing;
- Results.

Under each of the headings there is an overall standard/criterion, followed by numbered elements which tease out the implications of adherence to the broad standard. The thirteen standards/criteria provide an overview of what is meant by quality distance education, and, if further detail is required, the reader can engage with the specific elements.

The intention was originally to publish the 1998 *Quality Criteria* as a separate policy document for distance education. But many people at the time thought when they read the document that the criteria actually applied to all educational provision, rather than merely to distance education, and that the standards of excellence in distance education should inform standards required for all educational provision. So the policy document was not published.

## The impact of the 1996 Quality Standards Framework

However, both the 1996 *Quality Standards Framework* and the 1998 *Quality Criteria* policy document have had an impact. They have been used both inside South Africa and internationally. Namibia, for example, is developing its approach to quality assurance for distance education based on the 1998 Criteria. In 2001, the Asian Association of Open Universities in association with the Commonwealth of Learning brought out a document entitled, *A Framework for Creating a Quality Assurance Culture in a Dedicated Distance Education Institution*, in which it acknowledged extensive use of the South African Quality Standards Framework document. Within South Africa, a variety of institutions have taken up the challenge of internal self-evaluation using the 1998 *Quality Criteria*.

However, even though there has been a growth in understanding and practice of quality distance education by a number of providers, at the same time much that is of poor quality persists. What is more alarming is that it is usually in programmes with large numbers, or in institutions whose distance education provision is growing steadily, that this poor quality persists. The financial gains from large scale provision, and the complexity of providing adequate support to large numbers of students together conspire to make providers resist change.

Some examples of this bad practice in South Africa include:

- In 2003, in an undergraduate course at first year level with an enrolment of over 10 000 learners, the only formative assessment was an optional multiple choice assignment. Student support in the form of contact sessions reached less than 10% of the students. It is estimated that the course cost R181 per student. On a conservative estimate the course made profits of R10 million a year but this money was not used to improve the assessment and learner support of the students on the course.
- In 2003, in a teacher upgrading course with 705 enrolments where the provider was receiving bursaries of R5000 per teacher, less than three hours of learner support was provided per module (about 3% of the notional learning hours of the module), and often this support consisted merely of showing a video of a lecture to the students.

The existence of the *Quality Standards Framework* which sets out very explicit requirements for both learner support and assessment has obviously had no effect on these courses/programmes.

There are also, despite such forums as NADEOSA, widely differing understandings of what constitutes quality distance teaching and learning. Some providers have improved assessment and learner support, but when the course materials are evaluated, the teaching and learning method is clearly authoritarian transmission mode without any attempt to develop concepts step-by-step based on learners' experience.

There is a need for some measure of external regulation, and a stepped-up effort to achieve an understanding of what constitutes quality distance education that goes beyond acceptance of a common set of criteria. Under the South African Qualifications Authority and the

Council on Higher Education, external bodies have been created and are beginning to exert the required pressure for change. The remainder of this introduction explores the current thinking about how the quality of distance education can be controlled and improved. Although current thinking about strategies for quality assurance of distance education relates primarily to higher education, the criteria and minimum targets contained in this publication relate equally to general and further education.

## Current thinking on quality assurance of distance education in higher education in South Africa

### Should there be separate quality criteria for distance education?

An important question to ask about the quality assurance of distance education is whether or not it should be considered separately from the quality assurance of all education.

Current thinking on the question about whether or not to integrate quality assurance processes for distance education into those for all education is that, as far as possible, distance education concerns should be infused into criteria for the audit of all institutions and accreditation of all programmes. There is considerable overlap between criteria for quality distance education, and generic criteria for all educational programmes, and there is little point in proliferating criteria unnecessarily.

As a result, the Higher Education Quality Committee has consulted the distance education community and infused distance education concerns into both its *Criteria for Institutional Audit* (HEQC, 2004), and *Criteria for Programme Accreditation* (HEQC, 2004c).

For example, Criterion Eight of the *Criteria for Institutional Audit* (Higher Education Quality Committee, 2004:11) reads:

Clear and efficient systems and procedures are in place for the design and approval of new programmes, courses and modules. The requirements are consistently applied and regularly monitored.

Distance education additions are as follows (Higher Education Quality Committee, 2004: 12):

(ix) In the case of distance learning programmes, tested systems, technologies and support arrangements for materials development and delivery for distance learning.

In the case of the programme accreditation criteria, sometimes a minimum standard clearly appropriate particularly to distance education has been included in an obvious way. See Criterion 4 (vii) (Higher Education Quality Committee, 2004c:11):

For distance learning programmes, sufficient administrative and technical staff is employed to handle the specialized tasks of registry, dispatch, management of assignments, record-keeping, and other issues in relation to student needs.

In other cases, the infusion of distance education concerns is less obvious. For example, the following was added to one of the minimum standards in Criterion 3 (Higher Education Quality Committee, 2004c:10):

(ii) The majority of full-time academic staff has two or more years of teaching experience in a recognised higher education institution, and in areas pertinent to the programme. In the case of professional programmes, a sufficient number of academic staff members also have relevant professional experience. **Qualified and experienced academic staff design the learning programme, although junior or part-time tutors may act as facilitators of learning.** [our emphasis]

The last sentence of this minimum standard is important in the case of distance education programmes in which typically academics at the central institution design curriculum and materials, but employ part-time tutors to assist students in local learning centres close to where they live or work. Although critical for distance education, the standard is also relevant to tutoring arrangements at face-to-face institutions.

However, infusion of distance education concerns into criteria for the accreditation of all programmes does not imply that there is no distinction between distance and face-to-face education.

In the late 90s, the thinking was that it was counter-productive to deal with distance education separately from the rest of education. There was at the time a feeling that the distinction between face-to-face and distance education was blurring, and that there would, in due course, be a convergence. This opinion was strengthened by the fact that nearly all the criteria for distance provision could equally be applied to face-to-face provision. In addition, distance providers were concerned that for distance education to be dealt with separately would mean being regarded as inferior, and distance programmes should compete equally with all educational programmes.

However, it is clear from recent research (Council on Higher Education, 2004) that in South Africa at least, while the distinction may be blurring, distance and face-to-face education are not converging. There is still a distinct role for distance education and the requirements for successful delivery need to be spelt out so that distance education can fulfil this role properly. The NADEOSA Quality Criteria in Section Two of this book are an attempt to do this. For example, high quality learning materials are critical for successful distance delivery, because, in distance education it is the materials that are the main teacher – rather than the lecturer standing in front of a class or managing a tutorial. Hence the NADEOSA Quality Criteria contain 18 elements that describe what quality materials are. These 18 elements cover both print-based and web-based materials, and deal with issues as wide-ranging as accessibility, coherence and approach to teaching and learning (See Quality Criterion no 5, elements 5.5.1 to 5.5.11 and 5.6.1 to 5.6.7).

However, criteria only have life and power inasmuch as they are used and interpreted. In addition, quality is not fixed and static but develops with changes in educational thinking and practices as well as with advances in technology. The rapid expansion of electronic learning has been the most noticeable change in the last decade.

For these reasons, the development of criteria has to be an ongoing consultative process, in which those most affected engage and contribute. A consultative process was followed in the revision of the 1998 Criteria for Quality Distance Education in South Africa: the criteria already established for distance education were revised, as well as expanded to include criteria for the use of electronic learning, leading to the NADEOSA Quality Criteria for Distance Education in Section Two of this book. They are a description of what constitutes quality as understood by the distance education community in South Africa at this point in our history.

Although only the HEQC's criteria carry legal force, there is a role for 'additional benchmarks' that are used in institutional processes of self-evaluation. The HEQC position with regard to use of additional criteria is that<sup>1</sup> :

The HEQC will require providers of distance education programmes to conduct periodic self-evaluation exercises to evaluate their effectiveness against the HEQC's criteria **as well as additional benchmarks that they wish to employ**. This will constitute part of the evidence when institutions apply for self-accreditation [our emphasis].

## Provider readiness to offer programmes using distance education methods

In the last ten years there has been a large increase in the number of distance education programmes offered by predominantly face-to-face providers. This is for a variety of reasons. Sometimes the shift to distance is not deliberate. When providers use e-learning in contact programmes, they realize that students do not actually have to be with a lecturer to be learning, and gradually they extend their programme to more and more students who seldom if ever are on campus. In other cases, the decision to offer programmes using distance education is deliberate – providers realize that they can increase access to a more diverse group of students in cost-effective ways, and they shift to distance. Whether deliberate or not, often the provider either does not know or is not willing to develop the systems necessary to deliver distance education effectively. For example, in large scale distance programmes, management of assignments is a major task. It is not a question of lecturers taking in assignments when they see the students one week, and returning the assignments the next week when they see the students again. Simply opening assignments received by post is a time-consuming logistical operation, let alone arranging for them to be marked by a range of tutors, moderated, and returned to students before the next assignment is due.

Face-to-face providers often require assistance with delivering programmes using distance methods. There are therefore plans to prepare a guide on provider readiness to offer programmes using distance education methods and use this in workshops for traditionally face-to-face institutions that wish to offer programmes using distance education methods.

In addition, however, institutional auditors as well as programme evaluators need to be aware of what to look for when traditionally face-to-face institutions offer programmes

<sup>1</sup> A quotation from the comment on the first proofs of this book from the HEQC, 1 February 2005

using distance education methods. Distance education concerns are infused into the HEQC's *Criteria for Programme Accreditation*, which all higher education programmes, whether face-to-face or distance, are required to meet. But because they are infused, the particular needs of distance education are not immediately apparent. A summary of separate distance education issues may therefore be helpful in judging provider readiness to offer programmes using distance education methods. We suggest the following summary as a starting point.

**Table 1:** Issues to consider in judging provider readiness to offer distance education programmes

<p><b>Planning development and review</b></p> <p>The particular characteristics and needs of distance education are taken into account in the planning, development and review of such programmes.</p> <ul style="list-style-type: none"> <li>• Programme planning and budgeting are aligned, with potential income clearly identified, and appropriate levels of resources are set aside for course design and development, for administrative systems and for supporting learners.</li> <li>• The design of the programme ensures explicit and reasoned coherence between, on the one hand, the aims and intended learning outcomes, and, on the other, the strategies for teaching at a distance, the scope of the learning materials and the modes and criteria of assessment.</li> <li>• The design of the programme provides a learning opportunity which gives to students a fair and reasonable chance of achieving the exit level outcomes required for successful completion.</li> <li>• Existing programmes are monitored, reviewed and subject to re-approval regularly, in particular to ensure that the content of all learning materials remains current and relevant and that learning materials, teaching strategies and forms of assessment are enhanced in the light of findings from feedback.</li> </ul> <p><b>Staffing</b></p> <p>The particular demands of distance education are taken into account in the staffing arrangements of programmes.</p> <ul style="list-style-type: none"> <li>• Course/module designers and developers are suitably qualified (at least 2 levels above the course/module level) and trained or guided in materials development.</li> <li>• Determination of staff workload makes provision for all aspects of course/module development and delivery, especially for materials development and assessment.</li> <li>• Arrangements are in place for proper recruitment, training and monitoring of the necessary part-time and contract staff.</li> <li>• Arrangements are in place for academic and support staff to be trained to use any administrative systems and/or technologies used in the programme.</li> </ul> <p style="text-align: right;">continued page 15</p>
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### Programme implementation

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

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

### Assessment

Policies and procedures for assessment take into account the particular contexts of distance education students.

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

## National reviews of existing programmes

Provider readiness to offer distance education programmes is about new programmes – or existing face-to-face programmes that institutions want to offer using distance education methods. But there also needs to be a strategy for the quality assurance of existing programmes. However, it is not possible from a financial and human resources point of view to examine all existing distance programmes even within the next ten years. The Higher Education Quality Committee has therefore decided to undertake national reviews leading to re-accreditation in selected programme and qualification areas. The first such review was the MBA review in 2003/4 and the second is the National Review of Professional and Academic Programmes in Education planned for 2005 to 2007.

In the selection of such programme areas, the extent of large scale distance provision in that programme area needs to be taken into account for two reasons: the numbers of students affected, and the fact that in large scale distance education the temptation to maximize economies of scale at the expense of quality is great. The HEQC (Higher Education Quality Committee, 2004a: 4) notes that:

if it reviewed only 24 courses with enrolments of over 3000 in 2001, it could reach nearly one third of all UNISA's course enrolments. Similarly, by reviewing 14 distance education teacher education programmes at predominantly face-to-face institutions, the HEQC could reach nearly 71% of distance education full-time equivalent students at such institutions.

The national reviews will use the HEQC's programme accreditation criteria as the basis for developing subject-specific criteria for the particular field and programme to be reviewed. In the National Review of Professional and Academic Programmes in Education, there is also a task team led by UNISA which is developing a set of criteria particular to distance teacher education to be used together with the generic HEQC criteria.

## Conclusion

It is critically important to support all quality initiatives, both by advocacy and by capacity development for quality improvement. The intention is that, in partnership with the distance education community through such organizations as NADEOSA, the Higher Education Quality Committee will provide institutional capacity development through workshops on its criteria, guides for good practice and other relevant issues.

This publication is an element of this co-operative effort.

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