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Volume 5 - Number 1

THE VIEWS EXPRESSED ARE NOT
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CONTENTS

Acronyms and Abbreviations

GENERAL

ABET	Adult Basic Education and Training
CEM	Council of Education Ministers
CHE	Council on Higher Education
COSATU	Congress of South African Trade Unions
DACST	Department of Arts, Culture, Science and Technology
DoE	Department of Education
DoL	Department of Labour
ECD	Early Childhood Development
FET	Further Education and Training
FETC	Further Education and Training Certificate
GETC	General Education and Training Certificate
GET	General Education and Training
HEDCOM	Heads of Education Departments Committee
HEQC	Higher Education Quality Committee of the CHE
HET	Higher Education and Training
HIV/AIDS	Human Immunodeficiency Virus/Acute Immunity Deficiency Syndrome
HRD	Human Resource Development
JIP	Joint Implementation Plan
NPDE	National Professional Diploma in Education
NSA	National Skills Authority
NSDS	National Skills Development Strategy
QC	Qualifications and Quality Assurance Council (proposed)
RPL	Recognition of Prior Learning
SETA	Sector Education and Training Authority
TOP QC	Trade, Occupational and Professional Qualifications and Quality Assurance Council (proposed)
Umalusi	Council for Quality Assurance in General and Further Education and Training

SAQA

ETQA	Educational and Training Quality Assurance Body
NLRD	National Learners' Records Database
NQF	National Qualifications Framework
NSB	National Standards Body
SAQA	South African Qualifications Authority
SGB	Standards Generating Body

EDITORIAL COMMENT

The South African Qualifications Authority (SAQA) publishes the *SAQA Bulletin* to formalise and represent coherently debates around the National Qualifications Framework (NQF) so that these debates are opened to the wider research community. Responses and comments are welcome, and if appropriate, will be included in the next edition of the *SAQA Bulletin.*

This edition of the *SAQA Bulletin* contains five papers focusing on a range of NQF-related issues.

The first paper entitled *Understanding systemic change in building a South African Education and Training System: lessons learnt in overseeing the NQF,* is based on a presentation in October 2003 by Samuel Isaacs at a local conference hosted by the Delta Foundation. It discusses the systemic change that the South African system is undergoing, and especially the role played by the NQF and SAQA. The paper gives a comprehensive description of the legislative framework in which the NQF is being implemented and relates the role of SAQA to other role players in education and training. The first part of the paper will be particularly valuable to someone who is not involved daily with the NQF. The second part of Isaacs' paper unpacks the deeper underlying systemic issues that have confronted SAQA during NQF implementation. Some of these include: the effect of a combination of high pressure and high support; the relationship between leadership, management and transformation; the threat of underlying power issues.

The Isaacs paper covers a broad range of NQF-related issues and sets the scene for the next two papers by Merlyn Mehl and Jonathan Jansen that evaluate the documents[1] that were recently released by the Departments of Education and Labour. In 2003, SAQA commissioned Mehl's paper *The National Qualifications Framework: Quo Vadis?* and Jansen's paper *Meta-evaluation Study: The Review of the South African Qualifications Framework and the National Qualifications Framework* with the brief to conduct a meta-evaluation study (an evaluation of an evaluation as explained by Jansen) of the recent reviews of SAQA and the NQF. Jansen and Mehl are both recognised academics and have been involved with the NQF since its conceptualisation in the early 1990s. The two papers represent their personal views and are not necessarily those of SAQA nor of the institutions with which they are associated.

A brief background to these two evaluations is useful. NQF stakeholders and partners were given the opportunity to submit comments on both documents.

[1] The *Report of the Study Team on the Implementation of the National Qualifications Framework* (April 2002) and *An Independant National Qualifications Framework System Consultative Document* (July 2003).

In 2002, the first round of public comments on the *Report of the Study Team on the Implementation of the NQF* resulted in the publication in 2003 of the *An Interdependant National Qualifications Framework System: Consultative Document* by the Departments of Education and Labour. The *Consultative Document* is significantly different from the *Report of the Study Team*, as the two responsible Ministers admitted in the foreword to the *Consultative Document:*

> It is with great pleasure that we are able to publish an initial joint response from the Departments of Education and Labour to the *Report of the Study Team on the Implementation of the National Qualifications Framework* (April 2002).
>
> We appreciate that this work has taken far longer than expected and that a number of people and process have been inconvenienced in the delay. So much is at stake and so many people will be affected by the outcomes that considerable care had to be exercised in its preparation.
>
> Given that some important proposals in this inter-departmental document differ substantially from those in the Study Team's Report it is only fair to give interested parties an opportunity to comment on them before final decisions are made (*Consultative Document*, 2003:ii).

By the time this edition of the *SAQA Bulletin* was published the public comment phase for the *Consultative Document* had been completed. Extensive comments (including those of SAQA) had been received by the joint departmental Task Team who was responsible for drawing up the *Consultative Document.* Except for the sense of urgency conveyed above by the Ministers, there seemed to be no clear indication of the way forward.

It is against this background that SAQA commissioned Jansen and Mehl to undertake evaluations of the *Consultative Document.* The two evaluations are interesting readings and although structured differently, convey a similar message. This is that the Task Team for the Consultative Document has moved 'well beyond' the narrow ambit of the terms of reference for the original Study Team whose only task was to speed up the implementation of the NQF by conducting a focused study:

> The Ministers explicitly stated that the study was not aimed at reversing the establishment and goals of the NQF (*Report of the Study Team*, 2002:3).

Jansen's paper is a meta-evaluation of the *Consultative Document*. Mehl uses a broader systemic approach, but nonetheless also addresses the main proposals contained in that document.

The last two papers go beyond the current NQF debates and focus on the architecture of qualifications within South Africa and the assessment and recognition of prior learning.

The paper by Nadina Coetzee[2], entitled *Education and Training in South Africa after a decade of democracy*, was presented in September 2003 at the 15th Annual Conference of the European Association for International Education held in Vienna. As was the case with Isaacs paper, Coetzee's paper gives a particularly useful overview of South Africa's transition from past education practices and includes a discussion on the establishment of the NQF. The detailed description of the current education and training structure complimented by an annexure providing a linear comparison between the previous fragmented structure and the NQF is particularly valuable for the informed reader.

The final paper by Ronel Heyns[3] is entitled *Developing models for the assessment and Recognition of Prior Learning.* The paper was presented in September 2003 at the Qualification Africa Conference held in Midrand. It is of a technical nature and will be of particular value to individuals and education and training providers who are faced with the challenges of implementing RPL. Heyns gives extensive examples of how credits can be obtained for qualifications and part qualifications in the context of the NQF. She describes 'equivalence of learning' and the identification of appropriate 'fit-for-purpose' assessment instruments. This paper builds on the work done in two other SAQA publications, *The Recognition of Prior Learning in the context of the South African National Qualifications Framework* and *Criteria and guidelines for the implementation of the Recognition of Prior Learning in the context of the South African NQF*[4]

Feedback

Readers are invited to contribute to the NQF-discourse by completing the enclosed feedback form. Comments and papers that contribute to the development of the NQF-discourse will be considered for inclusion in future publications.

THE STATUS OF ARTICLES IN THE *SAQA BULLETIN*

SAQA reasserts its statement in previous issues of the *SAQA Bulletin* that only those parts of the text clearly flagged as decisions or summaries of decisions taken by the Authority should be seen as reflecting SAQA policy.

[2] Nadina Coetzee heads up the Centre for the Evaluation of Educational Qualifications at SAQA, which is responsible for the evaluation of foreign qualifications.
[3] Ronel Heyns heads up the SAQA Research Unit and has been involved with various RPL-related initiatives.
[4] Both these publications are available at http://www.saqa.org.za

CHAIRPERSON'S FOREWORD

As we celebrate the tenth anniversary of our democracy it is crucial to also remember that the first act of parliament to be passed in 1995 was the South African Qualifications Authority (SAQA). Not only was the legislation symbolically important it also, through the National Qualifications Framework (NQF), laid a strong foundation for the transformation of education and training from a divided and unequal system to one that seeks to achieve systemic integration and world-class standards informed by the South African reality.

Between the passage of the legislation and today the journey has been, to put it mildly, daunting. For example, *de jure* segregation of education and training policies, practices and facilities has been abolished; the remaining *de facto* segregation hangs on a precarious thread that is threatened by a growing bevy of anti-discriminatory legislation. So the stubborn remains of the archaic mindset are destined to have a short lifespan.

But the resilience of retrograde modes of thought and practice cannot be underestimated and therefore must be tackled with great resolve. To be sure, there is an assortment of new challenges. Some of these have to do with the adjustments that hindsight happily offers; while others are imposed by external environmental imperatives. There is an old Chinese saying that counsels the need to be 'firm as a pine tree on strategy and, like a willow, to be flexible on tactics'. Likewise, it is important now to keep a steady hand on the vision of the NQF and be flexible on its implementation. However sometimes there can be excesses on either side as we are presently experiencing with reference to the willow-side of the metaphor.

This edition of the *SAQA Bulletin* coincides with a particularly turbulent time in the development and implementation of the NQF. The delayed finalisation of the ongoing NQF review process has resulted in policy and funding uncertainty for SAQA and the NQF. This is indeed troubling.

The NQF review started officially in August 2001 and culminated in the publication of the *Report of the Study Team on the Implementation of the National Qualifications Framework* in April 2002 and was followed by an extended period wherein public comments were received and a response from the Ministers of Education and Labour was eagerly awaited. Subsequently, in the light of the extensive comments received, the Education and Labour Ministers decided that a joint position had to be conveyed - this resulted in the appointment of an inter-departmental Task Team with the brief to 'prepare a draft joint statement on behalf of the Departments of Education and Labour'. The Departments of Education and Labour released their joint statement in July 2003 with the

publication of *The Interdependent National Qualifications Framework System – Consultative Document.* The public was, once again, given the opportunity to submit comments, which will, according to the *Consultative Document*, inform the subsequent formulation of a proposed new NQF Bill in 2004.

It is in the midst of all these developments that the South African Qualifications Authority remains committed to the national priorities of the alleviation of poverty, unemployment and poor health through delivering the NQF benefits to all South Africa's learners. These benefits include improved access to education and training, quality learning, redress, and development within an integrated national framework of qualifications. The publication of relevant and timeous papers in the *SAQA Bulletin* is one way in which such important NQF-debates can be opened to wider intellectual scrutiny. Our NQF will be stronger for such robust critical reflection.

Let us delay no more as that puts our achievements at great risk.

Dr Mokubung Nkomo
Chairperson
South African Qualifications Authority
April 2004

UNDERSTANDING SYSTEMIC CHANGE IN BUILDING A SOUTH AFRICAN EDUCATION AND TRAINING SYSTEM THAT IS WORLD CLASS [5]

Samuel BA Isaacs
South African Qualifications Authority

In this presentation I will endeavour to describe briefly the systemic change that our South African education and training system is undergoing, the crucial role played by the National Qualifications Framework (NQF) and the South African Qualifications Authority (SAQA) which is mandated to oversee the NQF's development and implementation, as well as the lessons learnt in implementing such large scale change.

Describing the systemic change

Professor Kader Asmal, our Minister of Education (2002) aptly stated the challenge for a transformed South African education and training system:

> The Department of Education faces one of the most complex and challenging tasks of our society, namely to build an education and training system for the 21st century. Our task is to ensure that all South Africans have access to lifelong education and training of high quality.

Similarly, on 27 March 2002 Mr M.M. Mdladlana, our Minister of Labour started recording the progress that had been achieved with regard to the national Human Resource Development (HRD) Strategy's learnership target that had been announced a year earlier:

> Last year, in April, my colleague, the Honourable Minister of Education, Professor Kader Asmal and I launched the country's first ever Human Resource Development Strategy, which has just been approved by Cabinet. At that launch a promise was made that by March 2002 there would be at least 3000 learners in learnerships. It is March 2002. I am pleased to announce that we have not only reached our target but also, surpassed it. There are 3203 learners in learnerships (Mdladlana, 2002).

In order to understand the systemic change environment for education and training one has to grasp the comprehensive legislative framework that has been established, SAQA's mandate, Vhutsila the National Skills Development Strategy (NSDS) led by the Department of Labour, Tirisano the Working Together strategic

[5] This paper was previously published in *Du Toit, P. & Westraad, S. (Eds.) 2003. Education and Training: Models for best practice. Port Elizabeth: Delta Foundation, pp.19-33.*

development plan of the Department of Education, and our national HRD Strategy. These are briefly described below.

The legislative framework

The following acts are essential to the understanding of the nature and scope of the systemic change being undertaken:

- SAQA Act (No. 58 of 1995)
- National Education Policy Act (No. 27 of 1996)
- South African Schools Act (No. 84 of 1996)
- Higher Education Act (No. 101 of 1997) with subsequent amendments
- Skills Development Act (No. 97 of 1998)
- Further Education and Training Act (No. 98 of 1998)
- Skills Development Levies Act (No. 99 of 1999)

The SAQA Mandate

SAQA's mandate is to oversee the development and implementation of the NQF. The objectives of the NQF referred to in the SAQA Act, (1995) are to:

- Create an integrated national framework for learning achievements
- Facilitate access to, and mobility and progressions within, education, training and career paths
- Enhance the quality of education and training
- Accelerate the redress of past unfair discrimination in education, training and employment opportunities and thereby
- Contribute to the full personal development of each learner and the social and economic development of the nation at large

SAQA ensures that our nation has:

- A standards setting system
- A quality assurance system
- A comprehensive management information system - the National Learners' Records Database (NLRD)

The recent advocacy campaign of SAQA summed up SAQA's role well with the pay-off line ‘SAQA - Ensuring Quality Qualifications’.

Vhutsila - The National Skills Development Strategy

Vhutsila has the following objectives:

- Developing a culture of high quality lifelong learning
- Fostering skills development in the formal economy for productivity and employability

- Stimulating and supporting skills development in small business
- Promoting skills development, employability and sustainable livelihoods through social development initiatives
- Assisting new entrants into employment

Tirisano - The working together strategic development plan of the Department of Education

The implementation plan for Tirisano, 2001-2002 has the following programmes:

- Programme 1: HIV/AIDS
- Programme 2: School Effectiveness and Educator Professionalism
- Programme 3: Literacy
- Programme 4: Further Education and Training
- Programme 5: Organisational Effectiveness of the National and Provincial Departments
- Programme 6: Values in Education

The national Human Resource Development (HRD) Strategy

The national HRD Strategy has the following five strategic objectives:

- Improving the foundations for human development
- Improving the supply of high-quality skills (particularly scarce skills) which are more responsive to societal and economic need
- Increasing employer participation in lifelong learning
- Supporting employment growth through industrial policies, innovation, research and development
- Ensuring that the four strategic objectives of the HRD Strategy are linked

“A nation at work for a better life for all” is a most appropriate one-liner for our national HRD Strategy.

SAQA and the NQF

The essential nature of the NQF is that of a social construct, in that we as social actors in society not only theorise about, construct and implement it, but we also enable, actively change or work against it.

The three necessary criteria that must be met for the NQF to be a successful social construct are:

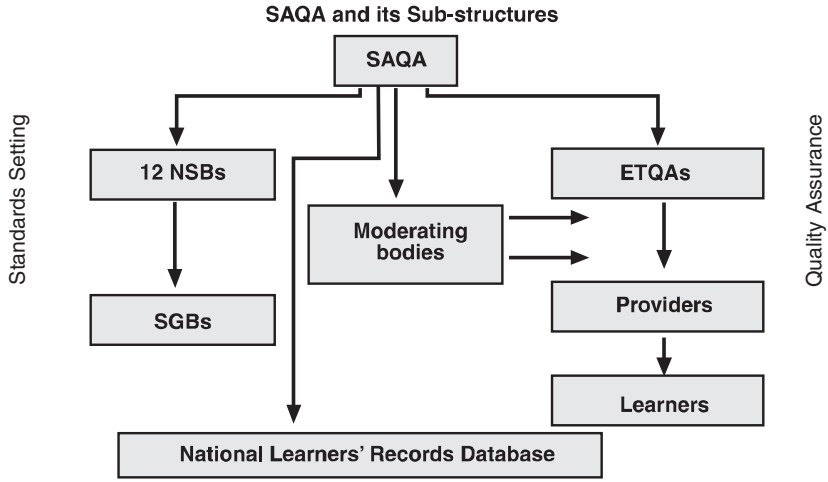
- Democratic participation of stakeholders: Legitimacy of the social construct is seriously undermined if this does not occur.

- Intellectual scrutiny: If the social construct cannot withstand intellectual scrutiny, its credibility weakens and therefore its legitimacy is undermined. For 'intellectual scrutiny', we can read academic scrutiny, international benchmarking, best practice, cutting-edge research and development and appropriate internal comparators.

- Adequate resourcing: Most social constructs falter and fail because of the failure to consider the issues of affordability and sustainability. Designing and building social constructs that we cannot afford to maintain, let alone build, condemns them to failure. However, with regard to the NQF it is not just how much money the state provides, but rather how we release, align and focus the multitude of resources - human, physical and financial - already allocated for education and training.
(Isaacs 2001:124)

SAQA takes all three of these requirements seriously and seeks to meet them through operationalising its functions via appropriate infrastructure, processes and procedures.

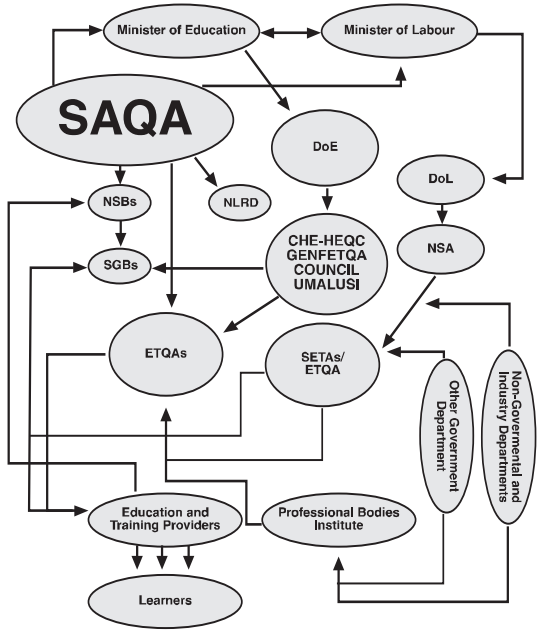
To operationalise standards setting, quality assurance and the National Learners' Records Database, SAQA has established the following sub-structures as illustrated in the diagram below:



Legend

NSB	National Standards Body
SGB	Standard Generating Body
ETQA	Education and Training Quality Assurance Body

These sub-structures relate to the various principal role players and stakeholders in the education and training system as illustrated in the diagram below:

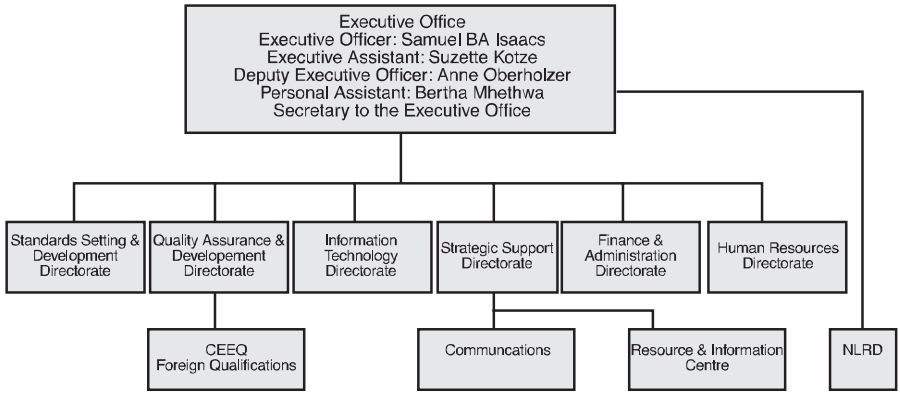


Legend

DoE	Department of Education
DoL	Department of Labour
CHE	Council on Higher Education
HEQC	Higher Education Quality Committee
NSA	National Skills Authority
SETAs	Sector Education and Training Authorities
GENFETQA council	General and Further Education and Training Quality Assurance Council (called UMALUSI)

(SAQA's Annual Report 2002)

In order to manage its functions SAQA has established six directorates reporting to an Executive Officer. SAQA's organogram is depicted below:



The design and establishment of adequate infrastructure and capacity to fulfil one's organisational and systemic mandate is essential for success. From our experience we have highlighted the following success factors:

- Systems are in place.
- Joint implementation plans.
- Tight project management.
- Open communication.
- Practices are embedded.
- Risk management.
- Results-based management.
- Understanding of systemic change.

The first and last factors have been the subject of the foregoing. With regard to open communication: Communication is seen as a critical strategic support function and this directorate is responsible for ensuring that SAQA implements its five-year communications strategy. Joint implementation plans and tight project management are commented on later in this section. The remaining success factors are discussed in the final section.

While discussing the infrastructure and capacity requirements for the kind of systemic change initiated by the NQF, one often forgets about why a country would want an NQF. In addition to those expressed as objectives of our NQF (namely integration, access, quality, redress and development) there are the following global imperatives that drive the formation of national qualifications frameworks:

- Promoting the development of a nation that is committed to lifelong learning.
- Ensuring quality education and training.
- Intellectual capital for a competitive edge.
- Rapid technological change.
- Change, change and more change.

Dave Ulrich (1998) describes a similar set of imperatives that drive strategic human resource management and at SAQA we agree that human resource management and development is a strategic function. For this reason we have a directorate dedicated to it.

In the same vein, it is insightful to view the critical cross-field education and training outcomes that form part of all qualifications that are registered on our NQF. These are:

- Identifying and solving problems in which responses display that responsible decisions using critical and creative thinking have been made.

- Working effectively with others as a member of a team, group, organisation, community.
- Organising and managing oneself and one's activities responsibly and effectively.
- Collecting, analysing, organising and critically evaluating information.
- Communicating effectively using visual, mathematical and/or language skills in the modes of oral and/or written persuasion.
- Using science and technology effectively and critically showing responsibility towards the environment and health of others.
- Demonstrating an understanding of the world as a set of related systems by recognising that problem-solving contexts do not exist in isolation.
- Contributing to the full personal development of each learner and the social context at large, by making it the underlying intention of any programme of learning to make an individual aware of the importance of:

  - Reflecting on and exploring a variety of strategies to learn more effectively.
  - Participating as responsible citizens in the life of local, national and global communities.
  - Being culturally and authentically sensitive across a range of social contexts.
  - Exploring education and career opportunities.
  - Developing entrepreneurial opportunities.

(NSB Regulations, 1998)

This list is similar to the core skills, essential outcomes, key learning abilities and generic competencies of other countries. Note that systems-thinking is specifically covered under 'demonstrating an understanding of the world as a set of related systems by recognising that problem-solving contexts do not exist in isolation.' In order to understand systemic change we all must master this critical learning outcome.

I will use Vhutsila, our National Skills Development Strategy (NSDS) to illustrate how SAQA supports such systemic strategies for the delivery of NQF benefits to learners. Learnerships (our new apprenticeships) and skills programmes are cornerstones of Vhutsila. These are underpinned and supported by:

- The qualifications and standards registered by SAQA on the NQF.
- The quality assurance processes of ETQAs.
- Learner data and achievements captured on the NLRD.

For each of the NSDS objectives SAQA contributes through its role in overseeing the NQF. The table below illustrates this:

NSDS Objective	SAQA's underpinning & support
1. Developing a culture of high quality lifelong learning	• 193 NQF-registered qualifications linked to 285 learnerships • NQF-registered standards linked to skills programmes • RPL policy • 25 SETAs accredited as ETQAs • NLRD ready to receive learner achievments data
2. Fostering skills development in the formal economy for productivity and employment growth	• Futher generation of standards and qualifications linked to learnerships and skills programmes joint implementation plans • Ongoing monitoring and auditing of ETQAs
3. Stimulating and supporting skills development in small businesses	• Numerous applicable business qualifications and associated unit standards already registered on the NQF • Further generation of small business qualifications and unit standards joint implementations plans
4. Promoting skills development for employability and sustainable livelihoods through social development initiatives	• Appropriate standards generated and registered on the NQF joint implementation plans • RPL • Quality assured education and training provision
5. Assisting new entrants into employment	• NQF-registered qualifications linked to learnerships • RPL for access to available qualifications employment and further learning • NLRD data for monitoring and future planning

Achieving the performance indicators of strategy objectives requires the ongoing monitoring of and intervening in the system by the principal roleplayers to ensure that the objectives are being advanced and will indeed be achieved over agreed timelines. What is often overlooked is that the achievement of objectives requires that the principal roleplayers and stakeholders must all play their part. Too often there is apportionment of blame when things go wrong and one party claiming all credit when there are significant achievements. At SAQA we have found that mutually agreed joint implementation plans (JIPs) between roleplayers are essential in systemic change processes to ensure that all the necessary roleplayers acknowledge and take responsibility for the specific action plans that they have to execute. JIPs can then be very effectively used in tight project management processes to hold all parties accountable in order to achieve the desired results. It is also easier in such circumstances to highlight potential problems, their causes and the remedial actions to be taken. As standards, qualifications and quality assurance is at the heart of the HRD Strategy, SAQA readily enters into JIPs with stakeholders and principal

roleplayers to ensure that it plays its rightful part in advancing the objectives of the NQF. It is therefore appropriate to record SAQA's achievements as at October 2002:

Our standards settings setting system is fully developed and implemented. Significant outputs are:

- 12 functioning National Standards Bodies.
- 235 new qualifications registered.
- 7200 existing qualifications interimly registered.
- 3796 Standards registered.
- 134 registered Standards Generating Bodies.
- 48 Standards Generating Bodies in formation.

Our quality assurance system is developed and implemented. Significant outputs are:

- 33 accredited Education and Training Quality Assurance Bodies (ETQAs).
- Ongoing monitoring in place.
- Audits being planned for execution during 2003.
- Evaluating foreign qualifications.

Our National Learners' Records Database is fully developed and installed.

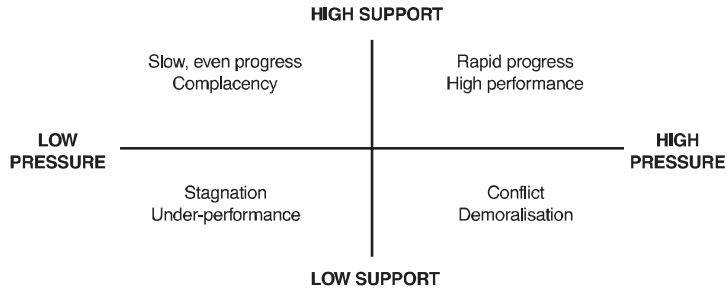
It has a capacity for thirty million individual learner records and is presently being populated. This electronic management information system will enable us to monitor our education and training system and inform policy decision-making. The NLRD is a world first and will enable us to do longitudinal and tracer studies on our learners with considerable ease and cost reduction. While outputs (results) are important, it is their impact that is most significant. To this end, the impact of SAQA's achievements are:

- The NQF is at the cutting edge, worldwide.
- There is wide participation in, and understanding of, education and training systemic change.
- Greater co-operation among stakeholders and sectors in a coherent approach is visible.
- There is improved quality and accountability.
- In overseeing the NQF, SAQA underpins the national HRD Strategy and supports the DoE's Tirisano Programme and the DoL's Vhutsila Skills Development Strategy.

- The assurance that the South African education and training system will be world class.
- The NLRD is assisting to monitor the education and training system and inform decision-making.

Lessons learnt in overseeing the NQF

Transformation of education and training systems are fraught with many difficulties. Just dealing with the democratic participation of stakeholders, intellectual scrutiny and adequate resourcing presents unique and interesting challenges. SAQA has utilised the following models in order to fulfil its role in overseeing the NQF:



High pressure - high support

Michael Barber and Vicki Phillips (2000:277-281) produced the model above. This model demonstrates that rapid progress and high performance occur when systems are put under pressure and given high support. Unfortunately the rhetoric is always 'you must do more with less' and given the low levels of support (including inadequate resourcing), this results in conflict and demoralisation. Persons exposed to this model can always clearly identify the state of their programme, organisation or system. In order to meet strategic objectives the accountability (high pressure) through appropriate monitoring and evaluation must be matched with high support (adequate resourcing, training, communication and other necessary support).

An example of how SAQA endeavours to provide high support to its stakeholders is the SAQA-Canadian International Development Agency Project's NQF Support Link which targets initially the Further Education and Training sector. The NQF Support Link is an end-to-end solution which can be delivered by

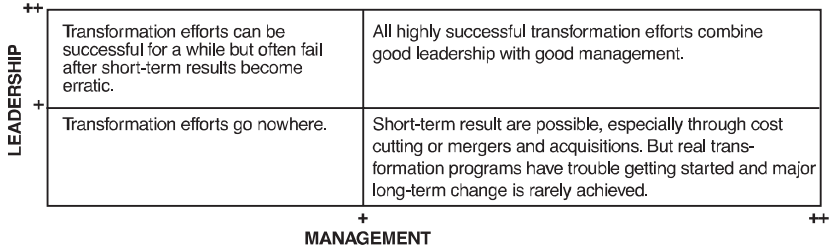
electronic, hard copy and face-to-face modalities.

It has the following six modules:

- Module 1: Implementing the NQF
- Module 2: Strategic Governance and the NQF
- Module 3: Learning Programmes and the NQF
- Module 4: Assessment and the NQF
- Module 5: Learnerships and the NQF
- Module 6: Information systems, the NRLD and the NQF

The relationship between leadership, management, short-term results and successful transformation

The model below by John Kotter (1996:129) in his book, 'Leading Change' is insightful:



Highly successful transformation efforts require high leadership and high management. Again, persons can quickly identify which quadrant their programme, organisation or system falls. SAQA has learnt that excellent leadership must be matched with excellent management. In the South African context the ongoing effective management of processes, programmes, organisations and systems poses a special challenge in respect of the backlogs and underdevelopment of the majority of South Africans under decades of Apartheid. Capacity, capability and financing all become critical.

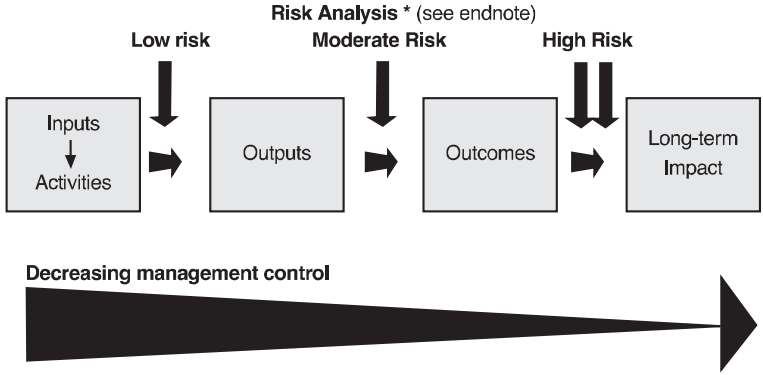
Results-based management

SAQA has adopted a results-based management approach in overseeing the NQF. Implicit in this approach is the balancing of the three R's: Results, Reach and Resources. Desired results in terms of outputs, outcomes and impact are

clearly articulated. The reach in terms of its effects on society and its social partners are monitored. Resources (human, physical, material and organisational) are utilised and channelled to achieve the desired results so that the reach in terms of the impact for beneficiaries in society is maximised. This management approach has allowed SAQA to provide the high levels of management required in terms of risk analysis and management. Needless to say, the issues around adequate resourcing and nationally agreed results and reach are clearly highlighted in a results-based management approach.

Risk analysis and management

It is critical to do a thorough risk analysis and develop the necessary strategies to address each risk as there is decreasing management control over the life of a project or implementation plan. The diagram below illustrates this:



Failure to do thorough risk analysis and management results in projects and implementation plans facing increasingly greater risks and the potential for failure and catastrophe is significantly enhanced.

Issues of power

While SAQA took all three of the requirements for democratic participation, intellectual scrutiny and resourcing seriously and sought to meet them, the underlying power issues were in a constant state of flux. The most critical threat to the successful implementation of the NQF was clearly recognised and documented in May, 1998 as the overt and covert agendas of NQF stakeholders. These stakeholders include SAQA members, SAQA staff, government departments, professional councils and bodies, consultants, providers, industrial training boards (now absorbed into sector education and training authorities) and other stakeholders

(Isaacs 2001: 138). These underlying power contestations are rooted in:

- the integrated approach to education and training.
- the lack of a 'NQF strategic partnership' between the Department of Education, the Department of Labour and SAQA.
- the lack of communities of trust, the vested interests, inconsistencies in legislation, incoherent policy development and implementation, and lack of leadership authority recognised both by office and competence.

The upshot of these power contestations led to difficulties in regard to adequate government funding for SAQA and to differing perceptions and expectations of the NQF's development and implementation. On 12 July 2001, the Ministers of Education and Labour established a Study Team whose brief was to 'examine how the NQF is developing and how we can focus, accelerate and strengthen its implementation'. The NQF Study Team Report was released on 6 May 2002 for public comment by 5 July 2002. SAQA submitted a detailed response by the due date. In it SAQA (2002) stated:

> Given that the NQF is a major vehicle for the transformation of education and training in South Africa and that it underpins and supports the national Human Resource Development Strategy, the Skills Development Strategy (Vhutsila) and Tirisano, it is untenable that its development and implementation is retarded by policy uncertainty, lack of adequate resourcing and strategic systemic leadership. The Report addresses these issues and SAQA broadly supports the relevant recommendations with a few concerns that need to be considered…

and

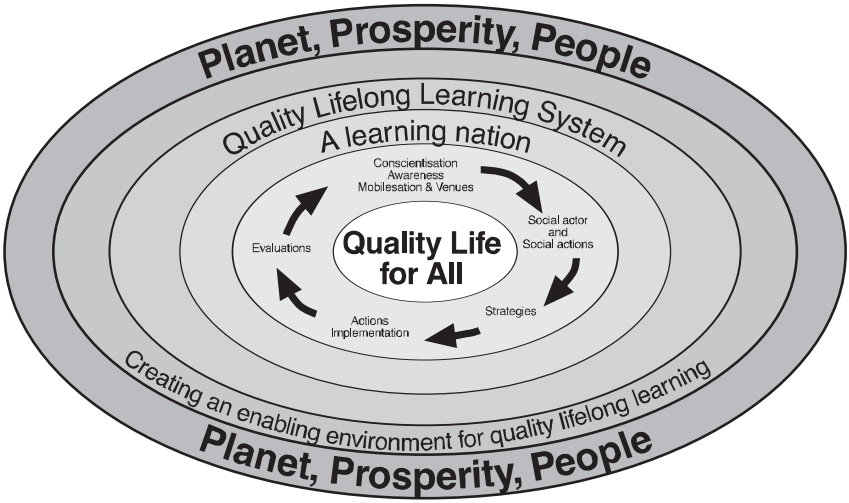
> …SAQA thanks the Ministers of Education and Labour for creating this significant opportunity to move the NQF to a higher level of development and implementation. We trust that the political decisions around the recommendations and the responses to them will be speedily taken, so that we can move away from the de-stabilisation of policy uncertainty to rapid delivery of the benefits of the NQF to the millions of learners as envisaged in the national HRD Strategy, Vhutsila and Tirisano.

At the time of writing (28 October 2002), Ministerial finality on the recommendations of this report had not been achieved. Given the well documented commitment of the Ministers of Education and Labour to the NQF, the policy uncertainty which has ensued is indicative of the complexity around large scale education and training

transformation. Michael Fullan (1999) rightly concludes that moral purpose, ideas and power are necessary for education change and that 'moral purpose and ideas without power means that the train never leaves the station'. Successful systemic change like that enabled by the NQF requires that one ensures and maintains the necessary power to develop and implement it. The power flux experienced by SAQA directly affects its ability to exercise leadership in its role of overseeing the development and implementation of the NQF.

Conclusion

At the World Summit on Sustainable Development on 27 August 2002 we showcased SAQA, which has been a significant beneficiary of European Union funding since 1999, on the European Union stand at the Ubuntu Village. We used the following diagram to illustrate how SAQA and its partners in the NQF were located within the 'Planet, Prosperity, People' of the World Summit on Sustainable Development and the 'Quality Life for All' of our national HRD Strategy:



This diagram summarises the systemic change SAQA and our country is engaged in. I trust that in this presentation I have demonstrated that 'we are making the NQF road by walking reflectively, accountably and boldly' as well as highlighting important features of models of best practice in education and training transformation.

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Endnote

Risk Analysis and the diagram of decreasing management control of risk over the life of a project came out of a management seminar. Unfortunately the original source could not be traced in time for this publication.

THE NATIONAL QUALIFICATIONS FRAMEWORK: QUO VADIS?

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Introduction

Eight years ago the National Qualifications Framework (NQF) was introduced in South Africa and started permeating the consciousness of education and training. In 1995, it was enshrined in the South African Qualifications Authority Act and the newly established body, the South African Qualifications Authority (SAQA) was charged with its implementation.

To give effect to the NQF, and closely allied to its introduction, two very substantial logistical operations were mounted in South Africa society. These were the following:

- The establishment of SAQA itself.
- The setting up of 25 Sector Education and Training Authorities (SETAs) to implement the Skills Development Act (1999) and the Skills Development Levies Act of 1999.

New concepts and new entities cannot be introduced into complex adaptive systems such as education and training structures without the system realigning its components, regrouping existing structures and protecting transitional and existing interests. It is often thought that changes introduced into a system will be seamlessly incorporated for the greater good, particularly if, as was the case with the NQF in 1995, they enjoy national and ideological acclaim. Changes seldom work that way and in 2003 the NQF is no exception.

The educational sector of South Africa now has before it two reports based on investigations of SAQA's activity during the past seven years. These are the following:

1. South Africa. Department of Education and Department of Labour. (2002). *Report of the Study Team on the Implementation of the National Qualifications Framework.* Pretoria.

2. South Africa. Department of Education and Department of Labour. (2003). *An Interdependent National Qualifications Framework System. Consultative document.* Pretoria.

While both reports explicitly state that there is still support for the NQF from all sectors of society, it is important to examine whether the recommendations that are made fully mirror this stated position. Or have elements of the education and training environment realigned themselves to support certain aspects of the NQF, while sidelining, or ignoring, others?

As far as South African society in the broad sense is concerned the question is: the NQF – Quo Vadis?

The great integrating vision of the NQF

It is important to remember that, particularly in the period 1990-1994; one of the main proponents of the NQF in South Africa was organised labour. This is noteworthy because it underscores the fact that while the NQF deals with the outcomes of education and training, namely, qualifications, it is an important social contract. Indeed, it goes to the very heart of how society recognises learning achievements in its midst.

Significantly the SAQA Act of 1995 was the first Act promulgated by the Department of Education of South Africa's first democratic government. The fact that SAQA would be jointly accountable to the Ministers of Education and Labour in the implementation of the NQF was both groundbreaking and visionary. It underscored the joint commitment of the two Ministries to implement a policy in education and training that would satisfy both its constituencies. It signalled the beginning of a truly integrated education and training system that would be expressed in the NQF.

Put another way, democratic government was highlighting its intent to try to achieve something deemed well nigh impossible in many education and training systems in the world. Why was such a bold, innovative and visionary approach applied to an area such as education and training that is generally regarded as extremely difficult to shift, let alone change?

It stemmed from the recognition that if there is no change in the way in which qualifications are awarded in society, then little else will change easily. The way in which society recognises, rewards and measures learning achievement is through qualifications. It is society that provides the ultimate validation of qualifications and accords respect to the bearer. Society awards status and also opportunity and privilege.

The apartheid legacy of South Africa completely skewed these customary societal norms. It produced, as State policy, a situation characterised by some of the most pernicious inequalities in the world in terms of human resource

development. This is easily seen in the way that education and training qualifications are distributed through South African society. This situation arose because of lack of opportunity for the majority of the population and the calculated mediocrity of the schooling for most South Africans.

Despite these adverse conditions, countless black South Africans took every opportunity they could to learn. Over many years, for many individuals, much of this learning happened in workplaces and other areas of social endeavour. Unfortunately, in contrast to the discipline and institution-based qualifications that characterised much of South African society before 1995, this type of learning is badly codified, unstructured and has not readily led to formal qualifications.

The NQF was introduced into this environment and its objectives as outlined in the SAQA Act are to:

- create an integrated national framework for learning achievements; facilitate access to, and mobility and progression within education, training and career paths;
- enhance the quality of education and training;
- accelerate the redress of past unfair discrimination in education, training and employment opportunities; and thereby
- contribute to the full personal development of each learner and the social and economic development of the nation at large.

Based on the numbers of people involved, it is apparent that to achieve these aims requires a complete societal restructuring of how and where learning is recognised, structured and rewarded. The last census indicates that a mere eight percent of the population have tertiary degrees. Of the 850 000 people working in the Wholesale & Retail Sector, two percent have degrees. The 833 000 persons with, at best, school based qualifications, exceed the total numbers of learners at all universities and technikons in the country.

Clearly, a dynamic and different approach is required. The NQF is that approach. To what extent do we as a nation continue to push for its full implementation?

Conceptual developments around the NQF

There is a growing, emerging literature on NQFs around the world. This is hardly surprising given the improved understanding that has developed about the ways in which knowledge is produced in society particularly with the advent of the ‘knowledge economy’.

Countries around the world have responded to the learning challenges faced by their societies by establishing national qualifications frameworks. Chapter 4 of the *Report of the Study Team on the Implementation of the National Qualifications Framework* (2002:36) entitled 'International Developments' provides a comprehensive summary of the development of NQFs around the world. This chapter represents an important resource for appreciating the scope, range and reach of NQFs worldwide:

> The NQF concept has spread to all continents and is still gathering strength. It might be too soon to decide that qualification frameworks in some form will permanently change the way in which all education and training systems work, but the concept has recently attracted impressive endorsements from the world education and training community (Study Team, 2002:36).

SAQA has contributed in no small measure to this literature with comprehensive publications outlining both the need and function of the NQF. It has enabled the NQF focus to be refined and expanded. The publication *The National Qualifications Framework: An Overview* (SAQA, 2000:7) says:

> If South Africa is to take up its position in the global village, it needs to embrace the new vocabulary of which Barnett speaks: competence and outcomes. Countries in Europe, the Pacific Rim, Australasia, and North America have either adopted or moved in the direction of a national qualifications framework, underwritten by a commitment to outcomes-based education. South Africa cannot afford to ignore these developments. The South African NQF with its emphasis on the notion of applied competence — the ability to put into practice in the relevant context the learning outcomes acquired in obtaining a qualification — is already contributing to these debates and developments.
>
> Associated with the recognition that knowledge needs redefinition is the recognition that sites of learning are many and varied. The traditional definitions of knowledge have implicitly designated formal institutions of learning as the primary site of learning. This perception has been reinforced by the fact that in most instances, a qualification is awarded by an institution, before any further learning in a practical environment is obtained by the learner. In other words, the sub-text is that once the qualification has been awarded, learning is over — and unless a learner registers for a new, formal qualification, learning for life is over! This bias towards qualification-as-destination is at odds with reality and also with what the White Paper on Education and Training (1995:15) identifies as the education and training requirement of a successful economy and society:

> Successful modern economies and societies require the elimination of artificial hierarchies, in social organisation, in the organisation and management of work, and in the way in which learning is organised and certified. They require citizens with a strong foundation of general education, the desire and ability to continue to learn, to adapt to and develop new knowledge, skills and technologies, to move flexibly between occupations, to take responsibility for personal performance, to set and achieve high standards, and to work co-operatively.

If one accepts that there is more than one dimension to knowledge and hence that learning continues both before and after a qualification has been awarded in a variety of sites of learning, then in order to achieve integration and coherence within the system so that access and portability can become a reality, it is necessary to clearly articulate the outcomes of learning achievements.

It is important to highlight the following central considerations in the area of knowledge-production in society that have become clearer as the implementation of the NQF has evolved:

1) Varied areas of knowledge-production

It is worth reminding ourselves of one of the seminal statements made in 1996 with respect to the NQF. This appeared in the Department of Arts, Culture, Science and Technology White Paper on Science and Technology: *Preparing for the twenty-first century* and introduced the idea of setting up a National System of Innovation. It elaborated extensively on the phenomenon of new forms and areas of knowledge production:

> Traditional ways of producing knowledge within single disciplines and institutions are being supplemented by knowledge generated within various applied contexts. This is knowledge that is collaboratively created within multi-disciplinary and trans-disciplinary research programmes directed to specific problems identified within social and economic systems. Setting up a national system of innovation in South Africa that will stimulate such collaborative, multi-disciplinary, applications-based research will require new policy (DACST, 1996:6).

The White Paper calls this ‘problem-solving knowledge’.

It is important to recognise that there is clear acknowledgement of the fact that there are numerous ‘knowledge-generating’ environments in our society. This

knowledge is generally 'multi-disciplinary and trans-disciplinary' in nature. For South Africa with its strict discipline-based education and associated qualifications structure, this recognition represents an important shift from the past.

Some illustrative categorisations of these knowledge-production environments are illuminating. These include the following:

2) Discipline-based knowledge-production

These are the best recognised areas and are usually given as prime examples of human intellectual achievement. Thus, for example, Einstein's General Theory of Relativity is widely regarded as one of the greatest feats of intellectual endeavour in a purely theoretical environment, requiring years before it could be subjected to vigorous practical proof. This is knowledge-production requiring years of the study of a discipline. The history of mankind is replete with similar examples both theoretical and practical.

Much of university and latterly, technikon endeavour is focused on this high level, discipline-based knowledge-production. Students at the lower levels are prepared for this by being exposed to the codified knowledge that has developed over centuries. Lower degrees are often simply stepping stones to enter this high level knowledge-production environment.

This is the environment with which all learners at tertiary level are acquainted from school onward. Historically, it is also the one area of society within which qualifications have been defined. As such it establishes the benchmark for all qualifications that are developed. And because of the value that society attaches to qualifications, any qualifications that are generated in different knowledge-production areas will be judged against these.

One of the main purposes of the NQF is to establish a 'parity of esteem' among the various sites of knowledge-production. However, given the long history of discipline-based knowledge-production and the associated qualifications structures underpinned by established and esteemed structures such as universities, this will be extremely difficult to achieve.

It will take years of qualification establishment in other knowledge-production environments and assessment of equivalence, before any 'parity of esteem' will be established. Society's acceptance of these 'alternative qualifications' will not be achieved automatically.

3) High level inter-disciplinary knowledge-production environments

Closely associated with the above areas, are the areas of application in various problem-solving situations. Consider, for example, how an institution such as the National Aeronautics and Space Administration of the United States of America solved the problem of placing persons on the moon. It was an inter-disciplinary endeavour involving physicists, chemists, mathematicians, engineers, et cetera. When the problem was solved by successfully placing people on the moon, the knowledge-production in the process belonged to all, and not specifically to any one discipline. This example is repeated in many different problem-solving environments in society.

For the purpose of this discussion it is important to recognise that despite this high level of knowledge-production and its close association with the discipline-bases, qualifications have not traditionally been generated from this inter-disciplinary knowledge-base.

4) Knowledge-production in economic sectors

With the growth in the 'knowledge economy', the importance of knowledge-production in various sectors has become more and more apparent. Indeed, in many sectors, the speed with which new knowledge can be generated is regarded as contributing to significant competitive advantage for the holders of that knowledge.

Out of this has come the concept of the intellectual capital of organisations. It is variously defined as follows: 'Intellectual Capital is intellectual material — knowledge, information, intellectual property, experience — that can be put to use to create wealth'.

Companies are beginning to value these intangible assets in the same way that they value the assets on their balance sheets. From this has arisen the field of Knowledge Management within companies.

Clearly, if there is so much actual value that can be attached to the 'knowledge assets' of organisations, then it must follow that people in workplaces, by absorbing this knowledge, that is, by learning, can but develop. Workplace learning deepens and broadens this knowledge-base.

Notice how the book *Understanding learning at work* (Bound & Garrick, 1999) begins:

> Learning at work has become one of the most exciting areas of development in the dual fields of management and education. It has moved to become a central concern of corporations and universities; it is no longer the pre-occupation of a small band of vocational training specialists.
>
> Today we see employees extending their educational capabilities in learning through their work. At the same time, opportunities and problems within work are creating the need for new knowledge and understanding.

It has become apparent that the notion of workplaces as focused users of narrow skills with very limited portability to other economic sectors is completely outdated. Within what is now called the 'knowledge economy', workplaces are recognised as multi-faceted, inter-disciplinary knowledge environments not at all limited to a narrow technical skills-base. The emphasis in today's workplaces on values, life skills, communication, management as well as a diversity of sector-specific knowledge-areas, redefines it as a developer of specific, general and highly portable competencies.

In defining 25 Sector Education and Training Authorities (SETAs) the Department of Labour (DoL) has begun an important process of codifying these knowledge-production environments. Given the amount of overlap between these sectors it can be seen that these areas are not cast in stone. It is only in the process of implementation that overlaps and repetitions will be eliminated.

This will be achieved only by establishing the appropriate sectoral qualifications frameworks and the associated qualification-sets that define these areas. In this way only is there any hope of establishing a 'parity of esteem' with discipline-based qualifications.

5) Poorly defined areas of knowledge-production

Within the areas of *high level inter-disciplinary knowledge-production environments and knowledge production in economic sectors* defined above, certain areas demonstrate better knowledge-codification than others. Thus in the past, certain areas were defined in terms of apprenticeships. Much of this definition took place in the manufacturing and associated areas. However, other areas are completely ill-defined. A few examples are given below to illustrate this.

i) The Wholesale & Retail Sector

Despite the large number of people it employs and its long history, few formal qualifications exist in institutions or elsewhere in the sector. It can be said with certainty that nothing exists that reflects the variety of work and knowledge of the sector. In defining the sector it is necessary to establish the following:

- A functional taxonomy of the functions that delineate the sector.
- A knowledge taxonomy that outlines the knowledge that underpins the functions.

An analysis of the knowledge required to define the sector demonstrates the richness of the learning that is embedded in it.

ii) The Information Technology Sector

This sector is characterised by a plethora of short-courses with few qualifications that are not vendor-driven. A major problem is that the formal institutional sector does not have the agility to define qualifications in an area that changes so rapidly.

The only means of achieving a definition of qualifications is to establish a dynamic qualifications framework that is based on functional and knowledge taxonomy of the area. Unit standards are a convenient way of capturing this. As the sector changes, the qualifications framework can be added to or unnecessary parts can be eliminated.

iii) The Service Sector

Because of the range of areas that fall in this sector, there is no one-size-fits-all approach to establishing qualifications frameworks in the various areas. For example, for domestic workers a unique, new framework had to be established. In the labour relations area, new qualifications have to be defined despite the fact that significant learning has always characterised those working in the area. In the public relations arena on the other hand, technikons in particular have well-defined qualifications but are significantly lacking in actual workplace experience.

6) The Spectrum of Knowing and Doing

Another means of characterising the various areas of knowledge-production is to recognise the importance of 'doing' as part of learning. For example, it is not possible to get a driver's licence without considerable actual experience of driving. Similarly, the country's medical training recognises the crucial importance of mixing theory and practice. The quality of the hospital practice in this country contributes significantly to producing the competent doctors we have.

What has become very apparent is that 'experience' has significant amounts of knowledge wrapped up in it. The problem is that it has never been adequately codified and made explicit. And it certainly has no qualifications that recognise it.

7) General considerations

If the NQF is to be successfully implemented then it is crucial that we recognise the variety of knowledge-production arenas in society. With this as point of departure the immense NQF task can follow a defined developmental path. This recognition at least delineates the task that is at hand if the objectives outlined in the SAQA Act are to be realised.

Note the following from *The National Qualifications Framework: An Overview* (SAQA, 2000:6):

> Ronald Barnett's discussion of competence in higher education epitomises the kinds of transition that are taking place in education and training systems the world over:
>
> > The new vocabulary in higher education is a sign that modern society is reaching for other definitions of knowledge and reasoning. Notions of skill, vocationalism, transferability, competence, outcomes, experiential learning capability and enterprise, when together, are indications that traditional definitions of knowledge are found to be inadequate for meeting the systems-wide problems faced by contemporary society. Whereas those traditional definitions of knowledge have emphasised language, especially through writing, an open process of communication, and formal discipline-bound conventions, the new terminology urges higher education to allow the term knowledge to embrace knowledge-through-action, particular outcomes of a learning transaction, and trans-disciplinary forms of skill.

At present, SAQA is confronted with the following three ways of categorising the knowledge that exists in our society:

1. The 12 Organising Fields[6] established at the outset of the NQF process. Each of these has roughly five sub fields defined by each National Standards Body (NSB) and approximately 60 knowledge areas.
2. The 25 SETAs established to oversee/define the education and training in their particular sector. Each SETA has roughly the equivalent of six chambers thus defining some 150 knowledge domains.
3. The normal discipline divisions that characterise formal Education and Training.

[6] For the 12 NQF Organising Fields refer to Endnote on page 46.

If the NQF is to be developed coherently, it is necessary to determine a means of reconciling the articulation of the various areas of knowledge-production. In addition, the relative intellectual value of the various sites and the way in which qualifications are structured within and across them becomes a very necessary endeavour.

It may help to recognise that the distinction that is normally drawn between 'academic' learning as the means of developing the individual, expanding the mind, et cetera, and workplace learning as narrow, focused and providing only technical competency, is under review in the modern knowledge-driven economies around the world.

What enhances the challenge of standards setting in these various areas is the fact that workplace learning is often highly contextual as well as being inter-disciplinary. Since 'inter-disciplinary' is, by definition, a combination of a number of disciplines, the problems translate into understanding the 'what' of the discipline that is required and 'how' articulation is achieved between disciplines. Contextual issues, seen in this light, become a matter of codifying knowledge appropriately and integrating it across disciplines. All these seemingly intractable issues are precisely what the NQF is designed to address.

One of the major challenges is not to perpetuate the past but to embrace the tremendous opportunities implicit in our definition as a society of 25 knowledge-production sectors each represented by a SETA. The SETA is the designated authority to define, describe and codify the knowledge of the sector and to deliver appropriate education and training within that sector on the back of newly defined qualifications — the learnerships. The opportunities for creative and different approaches are unparalleled in the history of South Africa.

Practical developments within the NQF over seven years

The establishment of SAQA as the vehicle to implement the NQF provides us with a convenient means of determining how the existing institutions have adapted to the implementation. It also makes it possible to analyse whether the existing institutions (particularly those tasked with NQF implementation) and society as a whole are meeting the original objectives.

The *Report of the Study Team on the Implementation of the National Qualifications Framework* (2002) tasked to look into the development of the NQF and particularly the SAQA role, contains numerous submissions from stakeholders. A central finding is the fact that there is wide support for the NQF by all stakeholders, although there is significant divergence on how its objectives are to be achieved. However, there are substantive differences

between the Department of Education (DoE) and the Department of Labour (DoL).

When SAQA was established in 1996/1997, very little was understood in the country about the NQF, outcomes-based education (OBE), unit standards, et cetera, except only in theory. Over the past six years, SAQA has created an entire intellectual infrastructure as well as a considerable human support system to implement the NQF. Initially SAQA occupied centre-stage with regard to the development of the new outcomes-based system, but particularly over the past two years, this position has receded.

Since the education and training structure is a complex adaptive system composed of many sectors, interests and emphases, it is not at all surprising that there is now considerable realignment of interests. It is probably fair to say that initially, as everybody was coming to terms with the NQF and OBE there was a high degree of involvement. Over time, however, the great central vision that is the NQF has been replaced by various sectors adapting to aspects of it within the boundaries of their own existing operations. While all still espouse the idea of the NQF this happens within the confines of each sector's own interpretation of what it means. In each case this is best assessed by determining to what extent present practice is significantly different from what it was prior to 1995.

The fact that there are now significant differences within the training and education environment with regard to SAQA and the NQF should have been anticipated. The main reason is that the establishment of an authority for all qualifications in the country, tasked with implementing a new construct, the NQF, would obviously impact differently on the various segments of the education and training landscape. Those having existing qualifications (such as the DoE and the Council of Higher Education [CHE]) would have one view. Whereas those (such as the DoL and the SETAs) needing to generate qualifications would have an entirely different view. Understandably SAQA attempted to create a *uniform framework* but in passing it should be mentioned that this is not necessarily the same as an *integrating framework*. It is easy to say this in retrospect. No such clarity existed in 1996.

It is important to determine the state of NQF implementation in the three main areas of the education and training landscape.

1) Department of Education: Pull back from SAQA processes and unit standard development

Initially, the DoE had a tentative involvement in SAQA standards setting processes in support of Curriculum 2005. When Curriculum 2005 was

reviewed, the Department undertook its own implementation without involvement in the SAQA process.

The following are important features of the new DoE approach:

- A stated intention to support NQF implementation.
- A commitment to ensure OBE.
- Development of curriculum statements, which in essence contain the elements of unit standards, albeit on a more macro-level.

It is interesting to note that in a recent statement on the new direction of the DoE, the Minister used the SAQA-developed critical outcomes as the basis for the new approach.

The major problem is the fact that while the new developments reflect an OBE bias, they serve to define very narrowly (especially at Further Education and Training (FET) level) the qualifications from the DoE. Articulation and integration will still be difficult. At the same time, the nature and focus of the FET Colleges which currently still fall under the DoE remain unclear.

It is in this arena that a construct such as the NQF is particularly applicable. In fact, unit standards that are designed to combine what the learner needs to do (outcomes) with what he/she needs to know in order to do it (assessment criterion and embedded knowledge) are particularly suited to both the FET environment in general and for vocationally-based FET Colleges in particular. Yet no such development is taking place.

It is also very difficult to see how curriculum statements, given their structure and credits, will readily articulate with the developments described below in the SETAs, or with the demands received by various NSBs within SAQA for specific discipline unit standards at NQF levels 2 to 4. Clearly, the great mobility of learning envisaged by the NQF is nowhere visible in the developments within the DoE. Essentially education to NQF level 4 via the DoE remains a fairly impermeable and impenetrable structure with limited articulation and integration with other developing parts of the education and training environment.

2) The Higher Education and Training Sector

From the outset, individuals from universities and technikons have been involved in SAQA at all levels. The technikons, in particular, have been very committed to restructuring their programmes. However, there has been strong resistance to unit standard development.

Early in the SAQA development process, the universities ensured the acceptance of the dual nature of qualification structuring, namely, unit standard based qualifications and qualifications based on exit level outcomes. They undertook to ensure that qualifications based on exit level outcomes reflected the outcomes-based thrust and incorporated the critical outcomes.

Essentially this meant that the old qualifications-structure remained unchanged. No attempt at integration of learning areas outside of the established, traditional models has even been contemplated. The implication of this is that university and technikon qualifications serve the purpose for which they were traditionally designed. The interim registration of qualifications by SAQA reflects this. These qualifications have now been designated as 'provider-driven' qualifications — essentially entrenching existing practice. Even the most cursory comparison between university and technikon offerings today and those prior to 1995 will reveal little that has changed fundamentally. Learners still achieve qualifications that frequently articulate poorly with workplace requirements and badly prepare people for work in the world outside the institution.

In recent times, with the emergence of the SETAs, CHE proposed that it be responsible for all qualifications based on exit level outcomes in the Higher Education and Training (HET) band. In this model, the SETAs, would only carry responsibility for unit standard based qualifications, and only to NQF level 5.

Not surprisingly, the CHE, like the DoE (as described above) wishes to retain control over its traditional area of operation, namely the tertiary level. While this is entirely understandable, it raises a number of important questions, such as the following:

- Is such a position really in the interest of the development of all peoples in South Africa?
- Does an approach of this nature square with international development in this area?
- Is such an approach supportive of an integrated NQF?
- Will such an approach enhance the national Human Resources Development (HRD) strategy?

It is worth noting that nothing in the above implies malicious intent. It is merely the way a sub-system protects its own interests and resists imposed change. However, for the purposes of this discussion it is important to reflect on whether the overall system could/should deal with its own sub-system.

3) The Department of Labour and the Sector Education and Training Authorities

In contrast to DoE and HET Sector, DoL and the SETAs are far more clearly aligned conceptually to the SAQA processes. This is illustrated by the fact that the SETAs, particularly, are placing very significant resources into learnership and unit standard development, and (recently) into qualifications frameworking efforts for their own specific sectors.

This is not surprising. NQFs worldwide have developed particularly because of the mismatch between the products of formal educational institutions and the requirements of the modern workplace. Indeed, the trade unions were among the major protagonists of SAQA and the NQF.

A cause for concern, however, must be the unequal development of the SETAs and their involvement in giving effect to the HRD strategy. It is apparent that there is little co-ordination of effort across SETAs and, in particular, poor common conceptualisation and intellectual development of the mammoth task that confronts them. While many of the SETAs and, indeed, the National Skills Fund (NSF) are not short of funds, they enjoy only a small measure of intellectual legitimacy, particularly from the side of the universities and technikons. They are seen more as rich sources of potential revenue, without a clearly defined idea of what they need to do.

This is partly due to the fact that because the highly integrated nature of the HRD strategy is poorly understood by all parts of the education and training environment. The huge potential for the country of an entirely new range of recognised qualifications - the learnerships - with all the implications for addressing the enormous backlogs in our society, remains a matter of paltry intellectual engagement by the existing qualifying structures.

It is left to the SETAs and the DoL, neither of whom have much experience in qualification design and structure, or the codification of the enormous amorphous mass of workplace knowledge that exists in the 25 defined sectors, to give shape and form to this entirely new construct. It is fair to say that at the present time the SETAs and DoL are potentially tremendous change agencies in our society.

The SETA development of qualifications and the associated learnerships and skills programmes have suffered conceptually from the undue emphasis initially placed on the writing of unit standards. This occurred at the expense of the extensive scoping of areas of knowledge-application required to determine the range of functions and supporting knowledge, which comprehensively define the knowledge-production areas of other sectors or sub-sectors. Instead of first

establishing the necessary sectoral or sub-sectoral qualifications frameworks underpinned by defining qualification-sets before writing necessary unit standards, the development process happened in reverse. The result was learnerships and qualifications in the various sectors that do not articulate readily and which are not part of an integrated sectoral qualifications framework. This will not facilitate the development of the NQF unless remedial action is taken.

To sum up, the current position is that the national discourse around education seems to recognise the following three areas of engagement:

- Academic learning
- Vocational learning
- Workplace learning

There has been a significant departure from the original integrating vision of the NQF. Ironically this comes at a time when SAQA itself has developed a far clearer understanding of the task at hand. This can be seen by its recent development of the following:

- A contextual model for qualifications design.
- An inter-disciplinary approach to standards setting and qualifications design.

However, if any type of integration and parity amongst various areas of knowledge-production are to be achieved, then far more extensive qualification-sets will need to be designed to capture sector knowledge-bases. It is only with practical examples that any possibility of intellectual parity between various qualifications can be analysed meaningfully.

It must be acknowledged that while the country still pays lip service to the idea of the NQF, the two major elements of the existing educational structure are working less than efficiently toward its realisation.

Is the NQF equal to the task?

Undoubtedly South Africa has undertaken a mammoth task in the democratic arena. The government cannot be accused of a lack of vision! But the implementation of any vision remains a challenge because that is the point where lives are touched and established structures and mindsets need realigning.

As pointed out above, it should not be assumed that the integrating vision of the NQF is fully accepted. Recently attacks have been made against the NQF

itself by the private sector and academics. These attacks have revolved around the issues of education versus training as well as the relevance of level descriptors. Therefore, the question whether the NQF is equal to the task confronting South African society is not an idle one.

In addressing the question, it is important to note that there is no such thing as 'The NQF'. The NQF itself is a work in progress, not a completed construct that we as a country must attempt to reach. As has frequently been said, the NQF must be created and constructed by South Africans, not adopted from somewhere else. It is crucial that we continue to reflect on the conceptual base of the NQF and ensure that it remains relevant and appropriate to our growing understanding of learning and its associated recognition in our society as a whole.

The HRD strategy in its entirety rests on the following two fundamental supporting pillars:

- Knowledge is produced in society in numerous areas of social and economic endeavours and is not confined exclusively to the normal, well-defined disciplines of the formal education and training system. This knowledge also makes high intellectual demands and needs to be codified and structured into nationally recognised and internationally bench marked qualifications and standards.
- The entire nation needs to be set on the path of lifelong learning if we are to realise the full potential of our population. This requires the crafting of a learning system where learners are truly at the centre of the learning process and can choose learning pathways that suit particular individuals.

Careful reflection on these pillars and the supporting legislation outlined above will easily show that this represents a complete departure from the supply-driven, teacher-centred, discipline-specific models of the past. Clearly, to move from the past to the future requires an enabling mechanism and a framework within which what is desired can occur.
As has been discussed above, the NQF provides that mechanism, but in a dynamic, changing world it is not cast in stone. Its very flexibility makes it the appropriate vehicle. The following issues have arisen recently around particular aspects of the NQF:

1) The NQF and business priorities

The business sector often argues that there is a fundamental difference between 'education' and 'training'. This view holds that the 'purpose' and the 'outcomes-based methodologies' of education and training are different,

and that unit standards 'confuse behavioural processes with outcomes' and are 'not attuned to requisite business goals'.

The central premise of this argument is that there are fundamental differences between 'education' and 'training' and that the differences cannot be reconciled within a single NQF. This is the old debate of the 1980's resurfacing cloaked in the language of the NQF, particularly 'outcomes' and 'outputs'.

What such positions fail to appreciate is that the NQF provides for a new system of 'learning'. It does so by recognising the many and varied areas of knowledge-production in society. It provides the means of codification of this knowledge and defines the framework within which qualifications can be defined. An analysis of any workplace at each of the different NQF levels, demonstrates graphically the wide range of knowledge areas, disciplinary, functional, social, cognitive, organisational and personal that are involved. To reduce all of this to simple 'training' programmes is to do the learner a grave disservice.

Recent developments among a number of the SETAs demonstrate the fallacy of this position. There is now a concerted move to establish qualifications frameworks that begin to define the extensive knowledge-base, both theory and practice, that is wrapped up in the various sectors delineated for convenience by the 25 SETAs. In achieving this it is necessary to engage in a very extensive scoping of the sector in terms of what incumbents do in various positions and what they need to know to do it competently. In the process the following are established:

i) The functional taxonomy of a sector

The first step is to divide the sector into the broad functions that define it and that cover the areas in which real jobs are done. The functions are not job descriptions, which rather define the levels at which various functions are performed. Experience has demonstrated that usually between 8 and 12 broad functional areas define a sector.

Each function in its turn is divided into a number of sub-functions, sub-sub-functions, et cetera. Here again, it has been demonstrated that usually three layers (to sub-sub-function) are sufficient to give a very detailed analysis of the sector usually with two levels sufficing. Going beyond this number starts to define the specific learning outcomes in a unit standard.

ii) The knowledge taxonomy of a sector

The knowledge taxonomy is constructed after the functional taxonomy. The knowledge taxonomy is made up of all the knowledge areas that underpin the various functions that define the sector. For convenience the knowledge taxonomy has been divided into eight Knowledge Areas. These are the following:

- Functional Knowledge: This is the knowledge that enables the individual to perform the function.
- Social Knowledge: This enables the learner to work constructively with others.
- Communication: This is placed as a separate category because of its cross-cutting importance.
- Disciplinary Knowledge: These are the normal well-known disciplines.
- Personal Mastery: These are the developmental aspects for individuals themselves.
- Organisational Knowledge: This is required as part of working in an organisation.
- Cognitive Processes: These are the processes of mind that can be developed and for which a vast literature exists.
- Business Knowledge: This is about business in general and the learner's workplace in particular.

It is in merging the functional taxonomy and the knowledge taxonomy that the Titles Matrices for qualifications begin to emerge.

iii) Determine the qualification-set for the sector

In juxtaposing the function taxonomy and knowledge taxonomy of the sector in as much detail as necessary, it is now possible to determine the qualification-set that will adequately define the learning needs and pathways in the sector.

At the same time, since the extensive learning outcomes that are defined as part of any unit standard are closely related to what individuals are able 'to do', there must be a very close relationship between competent activity and business priorities.

Thus the qualifications and then learnerships that emerge from this process are completely aligned with the requirements of competence development in any business situation. At the same time, however, it also encompasses the central requirement of the NQF — the holistic development of the individual.

At its heart the NQF recognises that learner development is far broader than simply training an individual to do a job better.

2) The NQF and level descriptors

In a recent article Blackmur (2003) challenges in particular, the value of level descriptors as a mechanism for determining the relative value of qualifications. He says:

> This paper argues that the conceptual and operational dimensions of a NQF classification system are such that it cannot serve the purposes for which it was designed … a structured, levelled NQF distorts information about qualifications to such an extent that serious consideration needs to be given to abandoning the NQF classification system as a viable instrument of public policy (Blackmur, 2003:2).

Not even the most fervent protagonists of the NQF regard it as a scientifically exact structure with the attendant body of theory and practice that can produce the intellectual rigour of (say) quantum mechanics. Any attempt to make the NQF academically perfect would fail. It is not and it is inconceivable that it will become such, until we know a lot more about learning in its totality than we do at present. The NQF is designed to introduce some degree of parity and equivalence between the many qualifications that are beginning to emerge from areas of knowledge-production with qualifications that already exist in the well-defined discipline arenas.

It is interesting to note that most of Blackmur's arguments centre on the present academic qualifications in society. He makes the point repeatedly that there is little perceived parity between different academic degrees at the same level. As a result, he argues that the labour market can get no reliable information with respect to possible appointments. But even this view suffers from the same lack of rigorous intellectual scrutiny that it accuses the NQF classification system of not having. For example, in the late 1980's, IBM recruited philosophy graduates for its burgeoning information technology systems development areas because these people demonstrated the appropriate cognitive capacities they were seeking. The issue of transferability of learning, cognitive processing and functioning across different knowledge areas has always been an extremely vexing question to both educators and learners. To expect NQFs to solve these questions in a few short years is to want the impossible. Perhaps it is a valid point that NQF developers should tone down the claims and expectations of what the NQF can achieve in this regard.

There are much broader political and social issues at stake here, particularly in a society with the historical inequalities of South Africa. As a society we need to bring into the parity loop all those millions who have no recognition at all for what

they have learned over many years in different environments, usually outside of formal institutions. Thousands of new qualifications in occupationally-based areas need to be established. This will have the effect of bringing millions of new 'graduates' into the frame. Establishing parity between these and the accepted academic qualifications will undoubtedly prove to be a tremendous intellectual challenge. But if the various areas of learning in our society need to be brought into balance, then it is imperative that it be done. For South Africa this is one of the prime reasons for establishing, expanding and refining the NQF.

Specifically, with respect to level descriptors, while it is blindingly obvious it is nevertheless worth saying: level descriptor definition is not an exact science. And thus, while it is possible to define a level with as many outcomes as you like it will never be sufficient. It is therefore probably better to err on the side of brevity.

Does this imply that level descriptors are unimportant? On the contrary, any system of learning must include progression paths. However, to try to make it as definitive as a set of concrete steps are not possible. Most disciplines have developed an innate logic over many years of what constitutes level progression. And these have to be updated regularly, since obviously a BSc in physics in the year 2003 would look very different from one in the year 1900, prior to Einstein, Bohr, Heisenberg, et cetera.

Even today the equivalence debate between a BSc with Mathematics and Physics and a BA with Philosophy and English is not one that can be definitively decided. Level descriptors have as much a feel about them, defined by able practitioners, as they are open to rigorous definition.

Now that occupationally-based qualifications are being added to the NQF bouquet, this will serve to add to the many dilemmas that already exist around level descriptors. A possible route in this regard is to match common sense and experientially-based approaches. For example, academic levels on the NQF have resulted as much from experience as from hard fact, as outlined above. Occupationally-based levels on the other hand, are readily defined in terms of levels of responsibility. For example, clearly the responsibility carried by the Chief Executive Officer (CEO) in an organisation is higher than that of a clerk. The greater responsibility as one moves up the company-tree often plays out in terms of strategic and operational areas. Matching NQF levels and responsibility levels could prove fruitful in developing uniform level descriptors.

Arguing that the NQF could suffer a degree of non-functionality over this issue would tend to extreme elitism. To require the NQF to solve dilemmas that have plagued discipline-based qualifications over many years is to ask for what is not possible.

Ultimately, what are required are high quality qualifications that can be implemented in the various learning environments. Out of this will emerge a degree of equivalence. And, in the process mistakes will be made. And so we will learn.

Measuring recent proposals with respect to the NQF against emerging reality

The two documents mentioned in the Introduction, address the state of the NQF. It is important to place the observations and recommendations contained in both the documents in the context of what is happening on the ground with regard to standards setting and qualifications establishment. There is a rapidly emerging reality as SAQA and the SETAs understand more clearly than before, both the magnitude of the task facing the nation and the amount of work involved in bringing the NQF to any semblance of fruition.

It is particularly important to note these issues in view of SAQA's almost six years of experience and the SETA's four year existence. While much time was spent initially clearly conceptualising the NQF tapestry, delivery is now beginning in earnest. This is not the time to be unravelling the fabric of standards setting and qualifications generation. Unit standards, qualifications, qualification-sets and qualifications frameworks are more and more rapidly coming off the production line. It is now incumbent on policy-makers to examine whether the structures in place are adequate to deal with the present and future increases. It is certainly not the time to decimate capacity.

What are the facts?

1. Discipline-based qualifications development is only a small component of our evolving learning system.
2. The dynamics of knowledge-production throughout our society are more clearly recognised.
3. The centrality of learning in diverse contexts is more readily understood.
4. The lack of recognition, codification, structuring and reward of this learning is being recognised.
5. The number of persons engaged in this type of learning far exceeds the total number in tertiary learning institutions in the country.
6. The seamless integration of discipline-based knowledge and trans-disciplinary knowledge-application and learning in actual working environments is far better understood.
7. SETAs are recognising the importance of sectoral qualifications frameworks within which reside qualification-sets and qualifications made up of a multiplicity of unit standards. These cover discipline-based and trans-disciplinary areas of knowledge as well as the knowledge of application.
8. Literally thousands of learnerships based on these qualification-sets are in the process of development. These will be tabled in the coming

months. The pressure on SAQA to ensure that the qualification-sets and related qualifications on which these learnerships are based are registered timeously and expeditiously will be tremendous. A proposal in this regard is made below.

9. Already in certain areas (for example, NSB 03[7]) the SAQA capacity is being severely tested.
10. In other areas, the SAQA capacity as presently structured is patently inadequate. For example, NSB 10[8] has under its aegis a Standards Generating Body (SGB) for Aeronautics Operations covering the air transport industry from 747 pilots to baggage handlers. It resorts under NSB 10 simply because there is no easy fit within the present 12 Organising Fields.
11. The demand for appropriate, targeted unit standards in various discipline-based fields is growing exponentially as trans-disciplinary, sectoral qualification framework development increases. For example (to name but a few), the need for unit standards in the following is exploding:
    - Mathematical Literacy
    - Communications
    - Life Skills
    - Management
    - Accounting
    - Mathematical Statistics
    - Physics
    - Chemistry
    - Et cetera.
12. The crucial role that the present discipline-based NSBs play in assuring coherent, consistent unit standards and exit level outcomes across curriculum statements, qualification and unit standard development is central to the development of a coherent NQF. Reality demonstrates that this role will grow, not diminish.

It is unacceptable and worrying that at the very time that the expertise developed over six years within NSBs and other SAQA structures (albeit in a fairly contained environment) is vitally necessary to deal with the coming flood, there are proposals that effectively dismantle that capacity.

Proposals to accommodate the emerging reality

The above gives a flavour of what is beginning to emerge on the ground. During the next two to three years as more and more SETAs realise the importance of qualifications frameworks in their sectors, the developing flood of qualifications and learnerships will become a torrent. It is estimated that if every

[7] NSB 03: Business, Commerce and Management Studies
[8] NSB 10: Physical, Mathematics, Computer and Life Sciences

SETA establishes sectoral qualifications frameworks, each will have an average of 20 new qualifications immediately. Each of these, if appropriately structured, could in their turn, probably support between three and five learnerships.

The question the various structures and particularly DoE, DoL and CHE should be asking themselves is how to gear up now to deal with this. It is no time to be dismantling SAQA and its hard earned capacity.

Self-evident measures include the following:

1. Revise and expand the number of the NSBs better to mirror, reflect and encompass the 12 Organising Fields and the 25 SETAs.
2. Review the 12 Organising Fields and retain the discipline-based fields in one or two NSBs (with appropriate expertise within reconstituted SGBs) while expanding the trans-disciplinary areas appropriately with attendant NSBs.
3. Reconstitute the make-up of the NSBs in association with the SETAs to do the following:
   · Retain appropriate stakeholder representation.
   · Incorporate relevant qualifications and standards setting expertise.
   · Include relevant sector experts.
4. Reduce the number of members on each NSB to no more than 12 and pay them for their time, expertise, et cetera.
5. Redefine appropriate SGBs under the newly reconstituted NSBs in a way that reflects the standards setting priorities that are emerging. Give each SGB appropriate, detailed capacity building.
6. Ensure that all SETAs and Professional Bodies are covered by the reconstituted NSBs.
7. Require each SETA to provide an annual grant to SAQA with a central grant from the National Skills Authority (NSA). This should be apart from the annual mandatory DoE and DoL allocations.

In addition, SAQA will have the following central roles with respect to the NQF:

A. Ensure the development of an integrated NQF as the country moves to the notion of a 'Ministry of Learning' in principle, if not in practice.
B. Ensure articulation between various elements of the NQF (Umalusi, CHE, proposed Trade, Occupational and Professional Qualifications and Quality Asssurance Council [TOP QC]) at the qualification and standards setting levels to make portability a reality.
C. Develop appropriate level descriptors.
D. Develop the theory and implementation of the Recognition of Prior Learning (RPL).

E. In general, address emerging elements of the qualification and standards setting system to promote the ultimate integration into one NQF.
F. Review activities after five years and introduce necessary changes, revisions et cetera.

Conclusion

While the above discussion has focused mainly on the knowledge-production and codification aspects of the NQF, the other major aspect that needs careful consideration is that of delivery. Given the large numbers of persons who will be affected directly by new qualifications and skills programmes that are being developed, creative and different means of delivery must be sought.

It will be naive to believe that this can be achieved without the enthusiastic involvement of the existing education and training structures at Higher Education and Training (HET), Further Education and Training (FET) and General Education and Training (GET) levels. It cannot be business as usual for these institutions. Rather, new and different learning partnerships will need to be crafted between workplaces large and small, public and private providers and the SETAs. Only in this way have we any hope as a nation of addressing the enormous backlogs with which we are faced. Lifelong learning for all who want it (one of the cornerstones of the NQF) will only be achieved in ways different from the traditional.

In the words of Albert Einstein: 'You cannot solve a problem with the same thinking that created it'.

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Endnote:

The 12 NQF Organising Fields are:

(1) Agriculture and Nature Conservation
(2) Culture and Arts
(3) Business, Commerce and Management Studies
(4) Communication Studies and Language
(5) Education, Training and Development
(6) Manufacturing, Engineering and Technology
(7) Human and Social Studies
(8) Law, Military Science and Security
(9) Health Sciences and Social Services
(10) Physical, Mathematical, Computer and Life Sciences
(11) Services
(12) Physical Planning and Construction.

THE NATIONAL QUALIFICATIONS FRAMEWORK: QUO VADIS?

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Introduction

Eight years ago the National Qualifications Framework (NQF) was introduced in South Africa and started permeating the consciousness of education and training. In 1995, it was enshrined in the South African Qualifications Authority Act and the newly established body, the South African Qualifications Authority (SAQA) was charged with its implementation.

To give effect to the NQF, and closely allied to its introduction, two very substantial logistical operations were mounted in South Africa society. These were the following:

- The establishment of SAQA itself.
- The setting up of 25 Sector Education and Training Authorities (SETAs) to implement the Skills Development Act (1999) and the Skills Development Levies Act of 1999.

New concepts and new entities cannot be introduced into complex adaptive systems such as education and training structures without the system realigning its components, regrouping existing structures and protecting transitional and existing interests. It is often thought that changes introduced into a system will be seamlessly incorporated for the greater good, particularly if, as was the case with the NQF in 1995, they enjoy national and ideological acclaim. Changes seldom work that way and in 2003 the NQF is no exception.

The educational sector of South Africa now has before it two reports based on investigations of SAQA's activity during the past seven years. These are the following:

1. South Africa. Department of Education and Department of Labour. (2002). *Report of the Study Team on the Implementation of the National Qualifications Framework.* Pretoria.

2. South Africa. Department of Education and Department of Labour. (2003). *An Interdependent National Qualifications Framework System. Consultative document.* Pretoria.

While both reports explicitly state that there is still support for the NQF from all sectors of society, it is important to examine whether the recommendations that are made fully mirror this stated position. Or have elements of the education and training environment realigned themselves to support certain aspects of the NQF, while sidelining, or ignoring, others?

As far as South African society in the broad sense is concerned the question is: the NQF – Quo Vadis?

The great integrating vision of the NQF

It is important to remember that, particularly in the period 1990-1994; one of the main proponents of the NQF in South Africa was organised labour. This is noteworthy because it underscores the fact that while the NQF deals with the outcomes of education and training, namely, qualifications, it is an important social contract. Indeed, it goes to the very heart of how society recognises learning achievements in its midst.

Significantly the SAQA Act of 1995 was the first Act promulgated by the Department of Education of South Africa's first democratic government. The fact that SAQA would be jointly accountable to the Ministers of Education and Labour in the implementation of the NQF was both groundbreaking and visionary. It underscored the joint commitment of the two Ministries to implement a policy in education and training that would satisfy both its constituencies. It signalled the beginning of a truly integrated education and training system that would be expressed in the NQF.

Put another way, democratic government was highlighting its intent to try to achieve something deemed well nigh impossible in many education and training systems in the world. Why was such a bold, innovative and visionary approach applied to an area such as education and training that is generally regarded as extremely difficult to shift, let alone change?

It stemmed from the recognition that if there is no change in the way in which qualifications are awarded in society, then little else will change easily. The way in which society recognises, rewards and measures learning achievement is through qualifications. It is society that provides the ultimate validation of qualifications and accords respect to the bearer. Society awards status and also opportunity and privilege.

The apartheid legacy of South Africa completely skewed these customary societal norms. It produced, as State policy, a situation characterised by some of the most pernicious inequalities in the world in terms of human resource

development. This is easily seen in the way that education and training qualifications are distributed through South African society. This situation arose because of lack of opportunity for the majority of the population and the calculated mediocrity of the schooling for most South Africans.

Despite these adverse conditions, countless black South Africans took every opportunity they could to learn. Over many years, for many individuals, much of this learning happened in workplaces and other areas of social endeavour. Unfortunately, in contrast to the discipline and institution-based qualifications that characterised much of South African society before 1995, this type of learning is badly codified, unstructured and has not readily led to formal qualifications.

The NQF was introduced into this environment and its objectives as outlined in the SAQA Act are to:

- create an integrated national framework for learning achievements; facilitate access to, and mobility and progression within education, training and career paths;
- enhance the quality of education and training;
- accelerate the redress of past unfair discrimination in education, training and employment opportunities; and thereby
- contribute to the full personal development of each learner and the social and economic development of the nation at large.

Based on the numbers of people involved, it is apparent that to achieve these aims requires a complete societal restructuring of how and where learning is recognised, structured and rewarded. The last census indicates that a mere eight percent of the population have tertiary degrees. Of the 850 000 people working in the Wholesale & Retail Sector, two percent have degrees. The 833 000 persons with, at best, school based qualifications, exceed the total numbers of learners at all universities and technikons in the country.

Clearly, a dynamic and different approach is required. The NQF is that approach. To what extent do we as a nation continue to push for its full implementation?

Conceptual developments around the NQF

There is a growing, emerging literature on NQFs around the world. This is hardly surprising given the improved understanding that has developed about the ways in which knowledge is produced in society particularly with the advent of the ‘knowledge economy’.

Countries around the world have responded to the learning challenges faced by their societies by establishing national qualifications frameworks. Chapter 4 of the *Report of the Study Team on the Implementation of the National Qualifications Framework* (2002:36) entitled 'International Developments' provides a comprehensive summary of the development of NQFs around the world. This chapter represents an important resource for appreciating the scope, range and reach of NQFs worldwide:

> The NQF concept has spread to all continents and is still gathering strength. It might be too soon to decide that qualification frameworks in some form will permanently change the way in which all education and training systems work, but the concept has recently attracted impressive endorsements from the world education and training community (Study Team, 2002:36).

SAQA has contributed in no small measure to this literature with comprehensive publications outlining both the need and function of the NQF. It has enabled the NQF focus to be refined and expanded. The publication *The National Qualifications Framework: An Overview* (SAQA, 2000:7) says:

> If South Africa is to take up its position in the global village, it needs to embrace the new vocabulary of which Barnett speaks: competence and outcomes. Countries in Europe, the Pacific Rim, Australasia, and North America have either adopted or moved in the direction of a national qualifications framework, underwritten by a commitment to outcomes-based education. South Africa cannot afford to ignore these developments. The South African NQF with its emphasis on the notion of applied competence — the ability to put into practice in the relevant context the learning outcomes acquired in obtaining a qualification — is already contributing to these debates and developments.
>
> Associated with the recognition that knowledge needs redefinition is the recognition that sites of learning are many and varied. The traditional definitions of knowledge have implicitly designated formal institutions of learning as the primary site of learning. This perception has been reinforced by the fact that in most instances, a qualification is awarded by an institution, before any further learning in a practical environment is obtained by the learner. In other words, the sub-text is that once the qualification has been awarded, learning is over — and unless a learner registers for a new, formal qualification, learning for life is over! This bias towards qualification-as-destination is at odds with reality and also with what the White Paper on Education and Training (1995:15) identifies as the education and training requirement of a successful economy and society:

> Successful modern economies and societies require the elimination of artificial hierarchies, in social organisation, in the organisation and management of work, and in the way in which learning is organised and certified. They require citizens with a strong foundation of general education, the desire and ability to continue to learn, to adapt to and develop new knowledge, skills and technologies, to move flexibly between occupations, to take responsibility for personal performance, to set and achieve high standards, and to work co-operatively.

If one accepts that there is more than one dimension to knowledge and hence that learning continues both before and after a qualification has been awarded in a variety of sites of learning, then in order to achieve integration and coherence within the system so that access and portability can become a reality, it is necessary to clearly articulate the outcomes of learning achievements.

It is important to highlight the following central considerations in the area of knowledge-production in society that have become clearer as the implementation of the NQF has evolved:

1) Varied areas of knowledge-production

It is worth reminding ourselves of one of the seminal statements made in 1996 with respect to the NQF. This appeared in the Department of Arts, Culture, Science and Technology White Paper on Science and Technology: *Preparing for the twenty-first century* and introduced the idea of setting up a National System of Innovation. It elaborated extensively on the phenomenon of new forms and areas of knowledge production:

> Traditional ways of producing knowledge within single disciplines and institutions are being supplemented by knowledge generated within various applied contexts. This is knowledge that is collaboratively created within multi-disciplinary and trans-disciplinary research programmes directed to specific problems identified within social and economic systems. Setting up a national system of innovation in South Africa that will stimulate such collaborative, multi-disciplinary, applications-based research will require new policy (DACST, 1996:6).

The White Paper calls this ‘problem-solving knowledge’.

It is important to recognise that there is clear acknowledgement of the fact that there are numerous ‘knowledge-generating’ environments in our society. This

knowledge is generally 'multi-disciplinary and trans-disciplinary' in nature. For South Africa with its strict discipline-based education and associated qualifications structure, this recognition represents an important shift from the past.

Some illustrative categorisations of these knowledge-production environments are illuminating. These include the following:

2) Discipline-based knowledge-production

These are the best recognised areas and are usually given as prime examples of human intellectual achievement. Thus, for example, Einstein's General Theory of Relativity is widely regarded as one of the greatest feats of intellectual endeavour in a purely theoretical environment, requiring years before it could be subjected to vigorous practical proof. This is knowledge-production requiring years of the study of a discipline. The history of mankind is replete with similar examples both theoretical and practical.

Much of university and latterly, technikon endeavour is focused on this high level, discipline-based knowledge-production. Students at the lower levels are prepared for this by being exposed to the codified knowledge that has developed over centuries. Lower degrees are often simply stepping stones to enter this high level knowledge-production environment.

This is the environment with which all learners at tertiary level are acquainted from school onward. Historically, it is also the one area of society within which qualifications have been defined. As such it establishes the benchmark for all qualifications that are developed. And because of the value that society attaches to qualifications, any qualifications that are generated in different knowledge-production areas will be judged against these.

One of the main purposes of the NQF is to establish a 'parity of esteem' among the various sites of knowledge-production. However, given the long history of discipline-based knowledge-production and the associated qualifications structures underpinned by established and esteemed structures such as universities, this will be extremely difficult to achieve.

It will take years of qualification establishment in other knowledge-production environments and assessment of equivalence, before any 'parity of esteem' will be established. Society's acceptance of these 'alternative qualifications' will not be achieved automatically.

3) High level inter-disciplinary knowledge-production environments

Closely associated with the above areas, are the areas of application in various problem-solving situations. Consider, for example, how an institution such as the National Aeronautics and Space Administration of the United States of America solved the problem of placing persons on the moon. It was an inter-disciplinary endeavour involving physicists, chemists, mathematicians, engineers, et cetera. When the problem was solved by successfully placing people on the moon, the knowledge-production in the process belonged to all, and not specifically to any one discipline. This example is repeated in many different problem-solving environments in society.

For the purpose of this discussion it is important to recognise that despite this high level of knowledge-production and its close association with the discipline-bases, qualifications have not traditionally been generated from this inter-disciplinary knowledge-base.

4) Knowledge-production in economic sectors

With the growth in the 'knowledge economy', the importance of knowledge-production in various sectors has become more and more apparent. Indeed, in many sectors, the speed with which new knowledge can be generated is regarded as contributing to significant competitive advantage for the holders of that knowledge.

Out of this has come the concept of the intellectual capital of organisations. It is variously defined as follows: 'Intellectual Capital is intellectual material — knowledge, information, intellectual property, experience — that can be put to use to create wealth'.

Companies are beginning to value these intangible assets in the same way that they value the assets on their balance sheets. From this has arisen the field of Knowledge Management within companies.

Clearly, if there is so much actual value that can be attached to the 'knowledge assets' of organisations, then it must follow that people in workplaces, by absorbing this knowledge, that is, by learning, can but develop. Workplace learning deepens and broadens this knowledge-base.

Notice how the book *Understanding learning at work* (Bound & Garrick, 1999) begins:

> Learning at work has become one of the most exciting areas of development in the dual fields of management and education. It has moved to become a central concern of corporations and universities; it is no longer the pre-occupation of a small band of vocational training specialists.
>
> Today we see employees extending their educational capabilities in learning through their work. At the same time, opportunities and problems within work are creating the need for new knowledge and understanding.

It has become apparent that the notion of workplaces as focused users of narrow skills with very limited portability to other economic sectors is completely outdated. Within what is now called the 'knowledge economy', workplaces are recognised as multi-faceted, inter-disciplinary knowledge environments not at all limited to a narrow technical skills-base. The emphasis in today's workplaces on values, life skills, communication, management as well as a diversity of sector-specific knowledge-areas, redefines it as a developer of specific, general and highly portable competencies.

In defining 25 Sector Education and Training Authorities (SETAs) the Department of Labour (DoL) has begun an important process of codifying these knowledge-production environments. Given the amount of overlap between these sectors it can be seen that these areas are not cast in stone. It is only in the process of implementation that overlaps and repetitions will be eliminated.

This will be achieved only by establishing the appropriate sectoral qualifications frameworks and the associated qualification-sets that define these areas. In this way only is there any hope of establishing a 'parity of esteem' with discipline-based qualifications.

5) Poorly defined areas of knowledge-production

Within the areas of *high level inter-disciplinary knowledge-production environments and knowledge production in economic sectors* defined above, certain areas demonstrate better knowledge-codification than others. Thus in the past, certain areas were defined in terms of apprenticeships. Much of this definition took place in the manufacturing and associated areas. However, other areas are completely ill-defined. A few examples are given below to illustrate this.

i) The Wholesale & Retail Sector

Despite the large number of people it employs and its long history, few formal qualifications exist in institutions or elsewhere in the sector. It can be said with certainty that nothing exists that reflects the variety of work and knowledge of the sector. In defining the sector it is necessary to establish the following:

- A functional taxonomy of the functions that delineate the sector.
- A knowledge taxonomy that outlines the knowledge that underpins the functions.

An analysis of the knowledge required to define the sector demonstrates the richness of the learning that is embedded in it.

ii) The Information Technology Sector

This sector is characterised by a plethora of short-courses with few qualifications that are not vendor-driven. A major problem is that the formal institutional sector does not have the agility to define qualifications in an area that changes so rapidly.

The only means of achieving a definition of qualifications is to establish a dynamic qualifications framework that is based on functional and knowledge taxonomy of the area. Unit standards are a convenient way of capturing this. As the sector changes, the qualifications framework can be added to or unnecessary parts can be eliminated.

iii) The Service Sector

Because of the range of areas that fall in this sector, there is no one-size-fits-all approach to establishing qualifications frameworks in the various areas. For example, for domestic workers a unique, new framework had to be established. In the labour relations area, new qualifications have to be defined despite the fact that significant learning has always characterised those working in the area. In the public relations arena on the other hand, technikons in particular have well-defined qualifications but are significantly lacking in actual workplace experience.

6) The Spectrum of Knowing and Doing

Another means of characterising the various areas of knowledge-production is to recognise the importance of 'doing' as part of learning. For example, it is not possible to get a driver's licence without considerable actual experience of driving. Similarly, the country's medical training recognises the crucial importance of mixing theory and practice. The quality of the hospital practice in this country contributes significantly to producing the competent doctors we have.

What has become very apparent is that 'experience' has significant amounts of knowledge wrapped up in it. The problem is that it has never been adequately codified and made explicit. And it certainly has no qualifications that recognise it.

7) General considerations

If the NQF is to be successfully implemented then it is crucial that we recognise the variety of knowledge-production arenas in society. With this as point of departure the immense NQF task can follow a defined developmental path. This recognition at least delineates the task that is at hand if the objectives outlined in the SAQA Act are to be realised.

Note the following from *The National Qualifications Framework: An Overview* (SAQA, 2000:6):

> Ronald Barnett's discussion of competence in higher education epitomises the kinds of transition that are taking place in education and training systems the world over:
>
> > The new vocabulary in higher education is a sign that modern society is reaching for other definitions of knowledge and reasoning. Notions of skill, vocationalism, transferability, competence, outcomes, experiential learning capability and enterprise, when together, are indications that traditional definitions of knowledge are found to be inadequate for meeting the systems-wide problems faced by contemporary society. Whereas those traditional definitions of knowledge have emphasised language, especially through writing, an open process of communication, and formal discipline-bound conventions, the new terminology urges higher education to allow the term knowledge to embrace knowledge-through-action, particular outcomes of a learning transaction, and trans-disciplinary forms of skill.

At present, SAQA is confronted with the following three ways of categorising the knowledge that exists in our society:

1. The 12 Organising Fields[6] established at the outset of the NQF process. Each of these has roughly five sub fields defined by each National Standards Body (NSB) and approximately 60 knowledge areas.
2. The 25 SETAs established to oversee/define the education and training in their particular sector. Each SETA has roughly the equivalent of six chambers thus defining some 150 knowledge domains.
3. The normal discipline divisions that characterise formal Education and Training.

[6] For the 12 NQF Organising Fields refer to Endnote on page 46.

If the NQF is to be developed coherently, it is necessary to determine a means of reconciling the articulation of the various areas of knowledge-production. In addition, the relative intellectual value of the various sites and the way in which qualifications are structured within and across them becomes a very necessary endeavour.

It may help to recognise that the distinction that is normally drawn between 'academic' learning as the means of developing the individual, expanding the mind, et cetera, and workplace learning as narrow, focused and providing only technical competency, is under review in the modern knowledge-driven economies around the world.

What enhances the challenge of standards setting in these various areas is the fact that workplace learning is often highly contextual as well as being inter-disciplinary. Since 'inter-disciplinary' is, by definition, a combination of a number of disciplines, the problems translate into understanding the 'what' of the discipline that is required and 'how' articulation is achieved between disciplines. Contextual issues, seen in this light, become a matter of codifying knowledge appropriately and integrating it across disciplines. All these seemingly intractable issues are precisely what the NQF is designed to address.

One of the major challenges is not to perpetuate the past but to embrace the tremendous opportunities implicit in our definition as a society of 25 knowledge-production sectors each represented by a SETA. The SETA is the designated authority to define, describe and codify the knowledge of the sector and to deliver appropriate education and training within that sector on the back of newly defined qualifications — the learnerships. The opportunities for creative and different approaches are unparalleled in the history of South Africa.

Practical developments within the NQF over seven years

The establishment of SAQA as the vehicle to implement the NQF provides us with a convenient means of determining how the existing institutions have adapted to the implementation. It also makes it possible to analyse whether the existing institutions (particularly those tasked with NQF implementation) and society as a whole are meeting the original objectives.

The *Report of the Study Team on the Implementation of the National Qualifications Framework* (2002) tasked to look into the development of the NQF and particularly the SAQA role, contains numerous submissions from stakeholders. A central finding is the fact that there is wide support for the NQF by all stakeholders, although there is significant divergence on how its objectives are to be achieved. However, there are substantive differences

between the Department of Education (DoE) and the Department of Labour (DoL).

When SAQA was established in 1996/1997, very little was understood in the country about the NQF, outcomes-based education (OBE), unit standards, et cetera, except only in theory. Over the past six years, SAQA has created an entire intellectual infrastructure as well as a considerable human support system to implement the NQF. Initially SAQA occupied centre-stage with regard to the development of the new outcomes-based system, but particularly over the past two years, this position has receded.

Since the education and training structure is a complex adaptive system composed of many sectors, interests and emphases, it is not at all surprising that there is now considerable realignment of interests. It is probably fair to say that initially, as everybody was coming to terms with the NQF and OBE there was a high degree of involvement. Over time, however, the great central vision that is the NQF has been replaced by various sectors adapting to aspects of it within the boundaries of their own existing operations. While all still espouse the idea of the NQF this happens within the confines of each sector's own interpretation of what it means. In each case this is best assessed by determining to what extent present practice is significantly different from what it was prior to 1995.

The fact that there are now significant differences within the training and education environment with regard to SAQA and the NQF should have been anticipated. The main reason is that the establishment of an authority for all qualifications in the country, tasked with implementing a new construct, the NQF, would obviously impact differently on the various segments of the education and training landscape. Those having existing qualifications (such as the DoE and the Council of Higher Education [CHE]) would have one view. Whereas those (such as the DoL and the SETAs) needing to generate qualifications would have an entirely different view. Understandably SAQA attempted to create a *uniform framework* but in passing it should be mentioned that this is not necessarily the same as an *integrating framework*. It is easy to say this in retrospect. No such clarity existed in 1996.

It is important to determine the state of NQF implementation in the three main areas of the education and training landscape.

1) Department of Education: Pull back from SAQA processes and unit standard development

Initially, the DoE had a tentative involvement in SAQA standards setting processes in support of Curriculum 2005. When Curriculum 2005 was

reviewed, the Department undertook its own implementation without involvement in the SAQA process.

The following are important features of the new DoE approach:

- A stated intention to support NQF implementation.
- A commitment to ensure OBE.
- Development of curriculum statements, which in essence contain the elements of unit standards, albeit on a more macro-level.

It is interesting to note that in a recent statement on the new direction of the DoE, the Minister used the SAQA-developed critical outcomes as the basis for the new approach.

The major problem is the fact that while the new developments reflect an OBE bias, they serve to define very narrowly (especially at Further Education and Training (FET) level) the qualifications from the DoE. Articulation and integration will still be difficult. At the same time, the nature and focus of the FET Colleges which currently still fall under the DoE remain unclear.

It is in this arena that a construct such as the NQF is particularly applicable. In fact, unit standards that are designed to combine what the learner needs to do (outcomes) with what he/she needs to know in order to do it (assessment criterion and embedded knowledge) are particularly suited to both the FET environment in general and for vocationally-based FET Colleges in particular. Yet no such development is taking place.

It is also very difficult to see how curriculum statements, given their structure and credits, will readily articulate with the developments described below in the SETAs, or with the demands received by various NSBs within SAQA for specific discipline unit standards at NQF levels 2 to 4. Clearly, the great mobility of learning envisaged by the NQF is nowhere visible in the developments within the DoE. Essentially education to NQF level 4 via the DoE remains a fairly impermeable and impenetrable structure with limited articulation and integration with other developing parts of the education and training environment.

2) The Higher Education and Training Sector

From the outset, individuals from universities and technikons have been involved in SAQA at all levels. The technikons, in particular, have been very committed to restructuring their programmes. However, there has been strong resistance to unit standard development.

Early in the SAQA development process, the universities ensured the acceptance of the dual nature of qualification structuring, namely, unit standard based qualifications and qualifications based on exit level outcomes. They undertook to ensure that qualifications based on exit level outcomes reflected the outcomes-based thrust and incorporated the critical outcomes.

Essentially this meant that the old qualifications-structure remained unchanged. No attempt at integration of learning areas outside of the established, traditional models has even been contemplated. The implication of this is that university and technikon qualifications serve the purpose for which they were traditionally designed. The interim registration of qualifications by SAQA reflects this. These qualifications have now been designated as 'provider-driven' qualifications — essentially entrenching existing practice. Even the most cursory comparison between university and technikon offerings today and those prior to 1995 will reveal little that has changed fundamentally. Learners still achieve qualifications that frequently articulate poorly with workplace requirements and badly prepare people for work in the world outside the institution.

In recent times, with the emergence of the SETAs, CHE proposed that it be responsible for all qualifications based on exit level outcomes in the Higher Education and Training (HET) band. In this model, the SETAs, would only carry responsibility for unit standard based qualifications, and only to NQF level 5.

Not surprisingly, the CHE, like the DoE (as described above) wishes to retain control over its traditional area of operation, namely the tertiary level. While this is entirely understandable, it raises a number of important questions, such as the following:

- Is such a position really in the interest of the development of all peoples in South Africa?
- Does an approach of this nature square with international development in this area?
- Is such an approach supportive of an integrated NQF?
- Will such an approach enhance the national Human Resources Development (HRD) strategy?

It is worth noting that nothing in the above implies malicious intent. It is merely the way a sub-system protects its own interests and resists imposed change. However, for the purposes of this discussion it is important to reflect on whether the overall system could/should deal with its own sub-system.

3) The Department of Labour and the Sector Education and Training Authorities

In contrast to DoE and HET Sector, DoL and the SETAs are far more clearly aligned conceptually to the SAQA processes. This is illustrated by the fact that the SETAs, particularly, are placing very significant resources into learnership and unit standard development, and (recently) into qualifications frameworking efforts for their own specific sectors.

This is not surprising. NQFs worldwide have developed particularly because of the mismatch between the products of formal educational institutions and the requirements of the modern workplace. Indeed, the trade unions were among the major protagonists of SAQA and the NQF.

A cause for concern, however, must be the unequal development of the SETAs and their involvement in giving effect to the HRD strategy. It is apparent that there is little co-ordination of effort across SETAs and, in particular, poor common conceptualisation and intellectual development of the mammoth task that confronts them. While many of the SETAs and, indeed, the National Skills Fund (NSF) are not short of funds, they enjoy only a small measure of intellectual legitimacy, particularly from the side of the universities and technikons. They are seen more as rich sources of potential revenue, without a clearly defined idea of what they need to do.

This is partly due to the fact that because the highly integrated nature of the HRD strategy is poorly understood by all parts of the education and training environment. The huge potential for the country of an entirely new range of recognised qualifications - the learnerships - with all the implications for addressing the enormous backlogs in our society, remains a matter of paltry intellectual engagement by the existing qualifying structures.

It is left to the SETAs and the DoL, neither of whom have much experience in qualification design and structure, or the codification of the enormous amorphous mass of workplace knowledge that exists in the 25 defined sectors, to give shape and form to this entirely new construct. It is fair to say that at the present time the SETAs and DoL are potentially tremendous change agencies in our society.

The SETA development of qualifications and the associated learnerships and skills programmes have suffered conceptually from the undue emphasis initially placed on the writing of unit standards. This occurred at the expense of the extensive scoping of areas of knowledge-application required to determine the range of functions and supporting knowledge, which comprehensively define the knowledge-production areas of other sectors or sub-sectors. Instead of first

establishing the necessary sectoral or sub-sectoral qualifications frameworks underpinned by defining qualification-sets before writing necessary unit standards, the development process happened in reverse. The result was learnerships and qualifications in the various sectors that do not articulate readily and which are not part of an integrated sectoral qualifications framework. This will not facilitate the development of the NQF unless remedial action is taken.

To sum up, the current position is that the national discourse around education seems to recognise the following three areas of engagement:

- Academic learning
- Vocational learning
- Workplace learning

There has been a significant departure from the original integrating vision of the NQF. Ironically this comes at a time when SAQA itself has developed a far clearer understanding of the task at hand. This can be seen by its recent development of the following:

- A contextual model for qualifications design.
- An inter-disciplinary approach to standards setting and qualifications design.

However, if any type of integration and parity amongst various areas of knowledge-production are to be achieved, then far more extensive qualification-sets will need to be designed to capture sector knowledge-bases. It is only with practical examples that any possibility of intellectual parity between various qualifications can be analysed meaningfully.

It must be acknowledged that while the country still pays lip service to the idea of the NQF, the two major elements of the existing educational structure are working less than efficiently toward its realisation.

Is the NQF equal to the task?

Undoubtedly South Africa has undertaken a mammoth task in the democratic arena. The government cannot be accused of a lack of vision! But the implementation of any vision remains a challenge because that is the point where lives are touched and established structures and mindsets need realigning.

As pointed out above, it should not be assumed that the integrating vision of the NQF is fully accepted. Recently attacks have been made against the NQF

itself by the private sector and academics. These attacks have revolved around the issues of education versus training as well as the relevance of level descriptors. Therefore, the question whether the NQF is equal to the task confronting South African society is not an idle one.

In addressing the question, it is important to note that there is no such thing as 'The NQF'. The NQF itself is a work in progress, not a completed construct that we as a country must attempt to reach. As has frequently been said, the NQF must be created and constructed by South Africans, not adopted from somewhere else. It is crucial that we continue to reflect on the conceptual base of the NQF and ensure that it remains relevant and appropriate to our growing understanding of learning and its associated recognition in our society as a whole.

The HRD strategy in its entirety rests on the following two fundamental supporting pillars:

- Knowledge is produced in society in numerous areas of social and economic endeavours and is not confined exclusively to the normal, well-defined disciplines of the formal education and training system. This knowledge also makes high intellectual demands and needs to be codified and structured into nationally recognised and internationally bench marked qualifications and standards.
- The entire nation needs to be set on the path of lifelong learning if we are to realise the full potential of our population. This requires the crafting of a learning system where learners are truly at the centre of the learning process and can choose learning pathways that suit particular individuals.

Careful reflection on these pillars and the supporting legislation outlined above will easily show that this represents a complete departure from the supply-driven, teacher-centred, discipline-specific models of the past. Clearly, to move from the past to the future requires an enabling mechanism and a framework within which what is desired can occur.
As has been discussed above, the NQF provides that mechanism, but in a dynamic, changing world it is not cast in stone. Its very flexibility makes it the appropriate vehicle. The following issues have arisen recently around particular aspects of the NQF:

1) The NQF and business priorities

The business sector often argues that there is a fundamental difference between 'education' and 'training'. This view holds that the 'purpose' and the 'outcomes-based methodologies' of education and training are different,

and that unit standards 'confuse behavioural processes with outcomes' and are 'not attuned to requisite business goals'.

The central premise of this argument is that there are fundamental differences between 'education' and 'training' and that the differences cannot be reconciled within a single NQF. This is the old debate of the 1980's resurfacing cloaked in the language of the NQF, particularly 'outcomes' and 'outputs'.

What such positions fail to appreciate is that the NQF provides for a new system of 'learning'. It does so by recognising the many and varied areas of knowledge-production in society. It provides the means of codification of this knowledge and defines the framework within which qualifications can be defined. An analysis of any workplace at each of the different NQF levels, demonstrates graphically the wide range of knowledge areas, disciplinary, functional, social, cognitive, organisational and personal that are involved. To reduce all of this to simple 'training' programmes is to do the learner a grave disservice.

Recent developments among a number of the SETAs demonstrate the fallacy of this position. There is now a concerted move to establish qualifications frameworks that begin to define the extensive knowledge-base, both theory and practice, that is wrapped up in the various sectors delineated for convenience by the 25 SETAs. In achieving this it is necessary to engage in a very extensive scoping of the sector in terms of what incumbents do in various positions and what they need to know to do it competently. In the process the following are established:

i) The functional taxonomy of a sector

The first step is to divide the sector into the broad functions that define it and that cover the areas in which real jobs are done. The functions are not job descriptions, which rather define the levels at which various functions are performed. Experience has demonstrated that usually between 8 and 12 broad functional areas define a sector.

Each function in its turn is divided into a number of sub-functions, sub-sub-functions, et cetera. Here again, it has been demonstrated that usually three layers (to sub-sub-function) are sufficient to give a very detailed analysis of the sector usually with two levels sufficing. Going beyond this number starts to define the specific learning outcomes in a unit standard.

ii) The knowledge taxonomy of a sector

The knowledge taxonomy is constructed after the functional taxonomy. The knowledge taxonomy is made up of all the knowledge areas that underpin the various functions that define the sector. For convenience the knowledge taxonomy has been divided into eight Knowledge Areas. These are the following:

- Functional Knowledge: This is the knowledge that enables the individual to perform the function.
- Social Knowledge: This enables the learner to work constructively with others.
- Communication: This is placed as a separate category because of its cross-cutting importance.
- Disciplinary Knowledge: These are the normal well-known disciplines.
- Personal Mastery: These are the developmental aspects for individuals themselves.
- Organisational Knowledge: This is required as part of working in an organisation.
- Cognitive Processes: These are the processes of mind that can be developed and for which a vast literature exists.
- Business Knowledge: This is about business in general and the learner's workplace in particular.

It is in merging the functional taxonomy and the knowledge taxonomy that the Titles Matrices for qualifications begin to emerge.

iii) Determine the qualification-set for the sector

In juxtaposing the function taxonomy and knowledge taxonomy of the sector in as much detail as necessary, it is now possible to determine the qualification-set that will adequately define the learning needs and pathways in the sector.

At the same time, since the extensive learning outcomes that are defined as part of any unit standard are closely related to what individuals are able 'to do', there must be a very close relationship between competent activity and business priorities.

Thus the qualifications and then learnerships that emerge from this process are completely aligned with the requirements of competence development in any business situation. At the same time, however, it also encompasses the central requirement of the NQF — the holistic development of the individual.

At its heart the NQF recognises that learner development is far broader than simply training an individual to do a job better.

2) The NQF and level descriptors

In a recent article Blackmur (2003) challenges in particular, the value of level descriptors as a mechanism for determining the relative value of qualifications. He says:

> This paper argues that the conceptual and operational dimensions of a NQF classification system are such that it cannot serve the purposes for which it was designed … a structured, levelled NQF distorts information about qualifications to such an extent that serious consideration needs to be given to abandoning the NQF classification system as a viable instrument of public policy (Blackmur, 2003:2).

Not even the most fervent protagonists of the NQF regard it as a scientifically exact structure with the attendant body of theory and practice that can produce the intellectual rigour of (say) quantum mechanics. Any attempt to make the NQF academically perfect would fail. It is not and it is inconceivable that it will become such, until we know a lot more about learning in its totality than we do at present. The NQF is designed to introduce some degree of parity and equivalence between the many qualifications that are beginning to emerge from areas of knowledge-production with qualifications that already exist in the well-defined discipline arenas.

It is interesting to note that most of Blackmur's arguments centre on the present academic qualifications in society. He makes the point repeatedly that there is little perceived parity between different academic degrees at the same level. As a result, he argues that the labour market can get no reliable information with respect to possible appointments. But even this view suffers from the same lack of rigorous intellectual scrutiny that it accuses the NQF classification system of not having. For example, in the late 1980's, IBM recruited philosophy graduates for its burgeoning information technology systems development areas because these people demonstrated the appropriate cognitive capacities they were seeking. The issue of transferability of learning, cognitive processing and functioning across different knowledge areas has always been an extremely vexing question to both educators and learners. To expect NQFs to solve these questions in a few short years is to want the impossible. Perhaps it is a valid point that NQF developers should tone down the claims and expectations of what the NQF can achieve in this regard.

There are much broader political and social issues at stake here, particularly in a society with the historical inequalities of South Africa. As a society we need to bring into the parity loop all those millions who have no recognition at all for what

they have learned over many years in different environments, usually outside of formal institutions. Thousands of new qualifications in occupationally-based areas need to be established. This will have the effect of bringing millions of new 'graduates' into the frame. Establishing parity between these and the accepted academic qualifications will undoubtedly prove to be a tremendous intellectual challenge. But if the various areas of learning in our society need to be brought into balance, then it is imperative that it be done. For South Africa this is one of the prime reasons for establishing, expanding and refining the NQF.

Specifically, with respect to level descriptors, while it is blindingly obvious it is nevertheless worth saying: level descriptor definition is not an exact science. And thus, while it is possible to define a level with as many outcomes as you like it will never be sufficient. It is therefore probably better to err on the side of brevity.

Does this imply that level descriptors are unimportant? On the contrary, any system of learning must include progression paths. However, to try to make it as definitive as a set of concrete steps are not possible. Most disciplines have developed an innate logic over many years of what constitutes level progression. And these have to be updated regularly, since obviously a BSc in physics in the year 2003 would look very different from one in the year 1900, prior to Einstein, Bohr, Heisenberg, et cetera.

Even today the equivalence debate between a BSc with Mathematics and Physics and a BA with Philosophy and English is not one that can be definitively decided. Level descriptors have as much a feel about them, defined by able practitioners, as they are open to rigorous definition.

Now that occupationally-based qualifications are being added to the NQF bouquet, this will serve to add to the many dilemmas that already exist around level descriptors. A possible route in this regard is to match common sense and experientially-based approaches. For example, academic levels on the NQF have resulted as much from experience as from hard fact, as outlined above. Occupationally-based levels on the other hand, are readily defined in terms of levels of responsibility. For example, clearly the responsibility carried by the Chief Executive Officer (CEO) in an organisation is higher than that of a clerk. The greater responsibility as one moves up the company-tree often plays out in terms of strategic and operational areas. Matching NQF levels and responsibility levels could prove fruitful in developing uniform level descriptors.

Arguing that the NQF could suffer a degree of non-functionality over this issue would tend to extreme elitism. To require the NQF to solve dilemmas that have plagued discipline-based qualifications over many years is to ask for what is not possible.

Ultimately, what are required are high quality qualifications that can be implemented in the various learning environments. Out of this will emerge a degree of equivalence. And, in the process mistakes will be made. And so we will learn.

Measuring recent proposals with respect to the NQF against emerging reality

The two documents mentioned in the Introduction, address the state of the NQF. It is important to place the observations and recommendations contained in both the documents in the context of what is happening on the ground with regard to standards setting and qualifications establishment. There is a rapidly emerging reality as SAQA and the SETAs understand more clearly than before, both the magnitude of the task facing the nation and the amount of work involved in bringing the NQF to any semblance of fruition.

It is particularly important to note these issues in view of SAQA's almost six years of experience and the SETA's four year existence. While much time was spent initially clearly conceptualising the NQF tapestry, delivery is now beginning in earnest. This is not the time to be unravelling the fabric of standards setting and qualifications generation. Unit standards, qualifications, qualification-sets and qualifications frameworks are more and more rapidly coming off the production line. It is now incumbent on policy-makers to examine whether the structures in place are adequate to deal with the present and future increases. It is certainly not the time to decimate capacity.

What are the facts?

1. Discipline-based qualifications development is only a small component of our evolving learning system.
2. The dynamics of knowledge-production throughout our society are more clearly recognised.
3. The centrality of learning in diverse contexts is more readily understood.
4. The lack of recognition, codification, structuring and reward of this learning is being recognised.
5. The number of persons engaged in this type of learning far exceeds the total number in tertiary learning institutions in the country.
6. The seamless integration of discipline-based knowledge and trans-disciplinary knowledge-application and learning in actual working environments is far better understood.
7. SETAs are recognising the importance of sectoral qualifications frameworks within which reside qualification-sets and qualifications made up of a multiplicity of unit standards. These cover discipline-based and trans-disciplinary areas of knowledge as well as the knowledge of application.
8. Literally thousands of learnerships based on these qualification-sets are in the process of development. These will be tabled in the coming

months. The pressure on SAQA to ensure that the qualification-sets and related qualifications on which these learnerships are based are registered timeously and expeditiously will be tremendous. A proposal in this regard is made below.

9. Already in certain areas (for example, NSB 03[7]) the SAQA capacity is being severely tested.
10. In other areas, the SAQA capacity as presently structured is patently inadequate. For example, NSB 10[8] has under its aegis a Standards Generating Body (SGB) for Aeronautics Operations covering the air transport industry from 747 pilots to baggage handlers. It resorts under NSB 10 simply because there is no easy fit within the present 12 Organising Fields.
11. The demand for appropriate, targeted unit standards in various discipline-based fields is growing exponentially as trans-disciplinary, sectoral qualification framework development increases. For example (to name but a few), the need for unit standards in the following is exploding:
    - Mathematical Literacy
    - Communications
    - Life Skills
    - Management
    - Accounting
    - Mathematical Statistics
    - Physics
    - Chemistry
    - Et cetera.
12. The crucial role that the present discipline-based NSBs play in assuring coherent, consistent unit standards and exit level outcomes across curriculum statements, qualification and unit standard development is central to the development of a coherent NQF. Reality demonstrates that this role will grow, not diminish.

It is unacceptable and worrying that at the very time that the expertise developed over six years within NSBs and other SAQA structures (albeit in a fairly contained environment) is vitally necessary to deal with the coming flood, there are proposals that effectively dismantle that capacity.

Proposals to accommodate the emerging reality

The above gives a flavour of what is beginning to emerge on the ground. During the next two to three years as more and more SETAs realise the importance of qualifications frameworks in their sectors, the developing flood of qualifications and learnerships will become a torrent. It is estimated that if every

[7] NSB 03: Business, Commerce and Management Studies
[8] NSB 10: Physical, Mathematics, Computer and Life Sciences

SETA establishes sectoral qualifications frameworks, each will have an average of 20 new qualifications immediately. Each of these, if appropriately structured, could in their turn, probably support between three and five learnerships.

The question the various structures and particularly DoE, DoL and CHE should be asking themselves is how to gear up now to deal with this. It is no time to be dismantling SAQA and its hard earned capacity.

Self-evident measures include the following:

1. Revise and expand the number of the NSBs better to mirror, reflect and encompass the 12 Organising Fields and the 25 SETAs.
2. Review the 12 Organising Fields and retain the discipline-based fields in one or two NSBs (with appropriate expertise within reconstituted SGBs) while expanding the trans-disciplinary areas appropriately with attendant NSBs.
3. Reconstitute the make-up of the NSBs in association with the SETAs to do the following:
   · Retain appropriate stakeholder representation.
   · Incorporate relevant qualifications and standards setting expertise.
   · Include relevant sector experts.
4. Reduce the number of members on each NSB to no more than 12 and pay them for their time, expertise, et cetera.
5. Redefine appropriate SGBs under the newly reconstituted NSBs in a way that reflects the standards setting priorities that are emerging. Give each SGB appropriate, detailed capacity building.
6. Ensure that all SETAs and Professional Bodies are covered by the reconstituted NSBs.
7. Require each SETA to provide an annual grant to SAQA with a central grant from the National Skills Authority (NSA). This should be apart from the annual mandatory DoE and DoL allocations.

In addition, SAQA will have the following central roles with respect to the NQF:

A. Ensure the development of an integrated NQF as the country moves to the notion of a 'Ministry of Learning' in principle, if not in practice.
B. Ensure articulation between various elements of the NQF (Umalusi, CHE, proposed Trade, Occupational and Professional Qualifications and Quality Asssurance Council [TOP QC]) at the qualification and standards setting levels to make portability a reality.
C. Develop appropriate level descriptors.
D. Develop the theory and implementation of the Recognition of Prior Learning (RPL).

E. In general, address emerging elements of the qualification and standards setting system to promote the ultimate integration into one NQF.
F. Review activities after five years and introduce necessary changes, revisions et cetera.

Conclusion

While the above discussion has focused mainly on the knowledge-production and codification aspects of the NQF, the other major aspect that needs careful consideration is that of delivery. Given the large numbers of persons who will be affected directly by new qualifications and skills programmes that are being developed, creative and different means of delivery must be sought.

It will be naive to believe that this can be achieved without the enthusiastic involvement of the existing education and training structures at Higher Education and Training (HET), Further Education and Training (FET) and General Education and Training (GET) levels. It cannot be business as usual for these institutions. Rather, new and different learning partnerships will need to be crafted between workplaces large and small, public and private providers and the SETAs. Only in this way have we any hope as a nation of addressing the enormous backlogs with which we are faced. Lifelong learning for all who want it (one of the cornerstones of the NQF) will only be achieved in ways different from the traditional.

In the words of Albert Einstein: 'You cannot solve a problem with the same thinking that created it'.

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Endnote:

The 12 NQF Organising Fields are:

(1) Agriculture and Nature Conservation
(2) Culture and Arts
(3) Business, Commerce and Management Studies
(4) Communication Studies and Language
(5) Education, Training and Development
(6) Manufacturing, Engineering and Technology
(7) Human and Social Studies
(8) Law, Military Science and Security
(9) Health Sciences and Social Services
(10) Physical, Mathematical, Computer and Life Sciences
(11) Services
(12) Physical Planning and Construction.

META-EVALUATION STUDY: THE REVIEW OF THE SOUTH AFRICAN QUALIFICATIONS AUTHORITY AND THE NATIONAL QUALIFICATIONS FRAMEWORK

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Introduction

In September 2003, the South African Qualifications Authority (SAQA) approached this consultant to conduct a meta-evaluative study of the recent reviews of SAQA and the National Qualifications Framework (NQF). The first review, conducted by a government-appointed Study Team, was entitled *Study Team on the Implementation of the National Qualifications Framework* (April 2002). It was responded to, and elaborated on, by an Inter-departmental Task Team from the Departments of Education and Labour and published as the Consultative Document: *An Interdependent National Qualifications Framework System* (May 2003).

The brief for this meta-evaluation of key review documents was constituted by the following tasks:

1. To assess the strengths and weaknesses of the major review documents and their recommendations.
2. To determine the underlying purposes of these reviews and why they emerged (timing) at this time.
3. To evaluate the scientific adequacy of the reviews, including their conceptualisation, methodologies, and indicators of measurement and implementation time frames.
4. To map the effects of the proposed interventions on established policy, the existing practice and current personnel in the short- and long-term.
5. To suggest alternatives, if any, to the proposed actions and recommendations.

In addition to the key documents cited above, this meta-evaluation also consulted documents that appeared at the same time (and often in reaction to) as the major Study Team Review and the official response from the two departments. (See details of the documents consulted in the Methodology section that follows later in this report).

Approach

A meta-evaluation is in fact *an evaluation of an evaluation.* A meta-evaluation is to be distinguished from a related methodology called *meta-analysis* in which statistical studies using the common method of 'effect sizes' applied to the same research question are used to determine the 'effects' of an intervention (X) on an outcome variable (Y).

From time to time an organisation might inquire as to the scientific adequacy and procedural fairness of a study of the organisation, whether commissioned internally or externally to that organisation. Such a meta-evaluation could then inform the organisation's response to the commissioned study and enable it to make strategic decisions.

There is no single or established procedure for doing a meta-evaluation; methodologies vary but the central questions to be answered remain more or less standard. The analytic framework used in this meta-evaluation, in pursuit of answers to the five key questions in the brief, was based on the following set of questions:

- Is the purpose of the study clearly stated?
- Does the report have scientific validity i.e., evidence, accuracy, thoroughness, coherence?
- Are the claims lodged within an adequate evidential base?
- Are the methods of gathering the data (information) appropriate to the purposes or questions pursued in the study?
- Are the assumptions that underpin the observations and claims defensible?
- Is the study procedurally fair i.e., have the immediate stakeholders been adequately consulted in the process?
- Are there significant blind spots in the coverage of the report?
- Do the recommendations follow logically from the claims?
- To what extent do the findings of the study resonate with the voices of the affected actors and stakeholders?

It is important to note at this point that I did not in this meta-evaluation delve into the very complex detail of NQF and SAQA structures, language and procedures but rather focused on the substantive and strategic content of what was being proposed, why it was being proposed, and with what possible effects on the education and training system as a whole. The detail as to the number of NQF levels or the changing roles of the Standard Generating Bodies (SGBs), for example, are left to those more competent in the technical minutiae that constitute the impressive architecture associated with the framework.

Methodology

The methodology employed relied mainly, and quite deliberately, on the written documentation that accompanied the various phases of review of SAQA and the NQF. These documents are the following:

1) South Africa. Department of Education and Department of Labour. (2002). *Report of the Study Team on the Implementation of the National Qualifications Framework*. Pretoria.

2) South Africa. Department of Education and Department of Labour. (2003). *An Interdependent National Qualifications Framework system. Consultative Document.* Pretoria.

3) South African Qualifications Authority. (2002). *Inter-National Standards Body Forum comments on the NQF Study Team report.* Pretoria: SAQA

4) South African Qualifications Authority. (2002). Response by the South African Qualifications Authority to the Report of the Study Team on the Implementation of the National Qualifications Framework. (5 July 2002). [Unpublished].

5) South African Qualifications Authority. (2003). Response of SAQA to the Consultative Document: An Interdependent National Qualifications Framework System. First draft for discussion at SAQA Meeting on 8 October 2003. [Unpublished].

6) Council on Higher Education. (September 2003). Report on an Interdependent National Qualification Framework System, prepared for the Council on Higher Education by Professor Michael Young, Institute of Education, University of London. [Unpublished].

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To a lesser extent, the study drew on selected interviews with both authors of the above reports and SAQA staff in order to clarify key aspects of the findings or recommendations made in the respective documents. To the extent that this

is largely a documentary study of the NQF and SAQA more broadly, this evaluation has both limits (multiple perspectives on the written text) and advantages (uninterrupted reading of the text) and should be read with these caveats in mind.

General observation

The review of the NQF is best understood as part of a series of policy reviews undertaken by the second post-1994 Minister of Education[9]. These policy reviews are not simply, as claimed, part of the normal cycle of administrative review associated with government bureaucracies throughout the world. Reviews also represent, as demonstrated elsewhere, a political intervention intended to revisit, revise or even reverse policies around which the political agenda has shifted. Such reviews are often conducted in response to political pressures from above or below (or both) to deal with an unsatisfactory situation. Reviews are often facilitated by a change in political leadership, e.g. a new Minister of Education. It would be a mistake, therefore, to read the review of the National Qualification Framework as simply a logical event following time-honoured procedures of reviewing, refining and affirming policy. In this context, the review of Curriculum 2005 and the review of the higher education landscape are prime examples of 'reviews as political intervention'. Inevitably, therefore, such reviews generate intense political turmoil, within and outside government bureaucracies.

Main Findings

This report presents six major findings for further discussion and deliberation within SAQA.

Finding 1

It is clear that the proposed restructuring of SAQA is <u>consistent</u> with a broader governmental commitment to 'streamlining' post-1994 policy structures (the architectural metaphor).

The terms of reference for the Study Team were extremely restrictive and focused very sharply on the implementation of the NQF. In the words of the brief:

> The [proposed] study demonstrates government's commitment to the building of the NQF. It will not be aimed at reviewing the government's

[9] I have explored policy reviews more fully in Jansen, J. D. (2001). Rethinking education policy making in South Africa: Symbols of change, signals of conflict. In: *Michael Young & Andre Kraak (Eds.). Education in retrospect: Policy and implementation since 1990, Human Sciences Research Council, pp. 41-58.*

goals and policies, but it will examine how the NQF is developing and how we can focus, accelerate and strengthen its implementation.

These terms not only restricted the Study Team from asking broader questions about the meaning and value of the NQF, it guided them very directly to regard 'implementation' as the problem. It remains an open question, however, as to whether the ways in which these recommendations are/were taken up by government in fact restricts itself to the implementation question. It is worth noting, however, that this is precisely the language that accompanied the review of the curriculum — nothing changes in the official policy, the concern is with implementation.

For now it is sufficient to state that 'the streamlining agenda' is not unique to the NQF. The general view of government was that the formulation of policy in the first four years of the new democracy (1994-1999) was too complex in design and language, too alienating to practitioners and users, and too cumbersome for purposes of implementation. It is in this context that the architectural metaphor gains prominence as a way of describing the problems of policy formulation and development during the early transition from apartheid.

However, it is important to record that the reviews undertaken thus far, though cautious not to be seen as policy revisionism, might in fact be doing just that. The review of Curriculum 2005 led to a fundamental revision of the very heart of the new reforms by taking away much of the complexity and replacing it with a basic curriculum design common to many countries — clear statements of achievement outcomes and considerable space for teachers to find ways of achieving those outcomes in diverse educational settings. The review of higher education led to fundamental revisions of commitments in White Paper III (*A Programme for Transformation*), leading in fact to a restriction of higher education opportunities rather than the massification once touted for the sector.[10] As will be demonstrated, the review of the NQF, and its 'take-up' by the two government departments, fundamentally alters not only the NQF but also the very mission and constitution of the South African Qualifications Authority. To assume, therefore, that the directive of the original brief to focus on 'implementation' is consequential in terms of either the recommendations or the response by government, is to ignore the fact that seismic shifts in the content and jurisdiction of qualifications had taken place despite the official rhetoric of continuity with past structures and the affirmation of existing policy.

Not surprisingly, the Study Team's streamlining actions were informed by its

[10] The more detailed argument can be found in Jansen, J. D. (2003). From mergers to massification; Higher Education in South Africa, 1994-2003. In: Chisholm, Linda (Ed.). Changing class? Pretoria: Human Sciences Research Council (forthcoming).

identification of 'seven factors that appear to lie behind the slow progress of NQF development', namely:

1) The large number of bodies involved in standards setting and quality assurance.
2) The size, composition, nature and capacity of these bodies.
3) The protracted standards setting, consultation and approval process.
4) The field focus of the NQF.
5) The complexity of relationships among the various Education and Training Quality Assurance Bodies (ETQAs).
6) The complexity of the quality assurance model.
7) The lack of academic guidelines for higher education (Study Team, 2002: v).

As will be demonstrated later, the kinds of recommendations that flow from this comment on bulk, focus and complexity implies a quite radical revisioning of both the NQF and SAQA — well beyond the bounds of 'implementation'.

Finding 2

It is clear that the implementation dilemmas facing SAQA, as the body tasked to oversee the development and implementation of the NQF, though overplayed to some extent, have their roots in unresolved political divisions, bureaucratic inertia and financial commitments on the part of its key sponsor — government

The work of SAQA and the ambitions of the NQF were always going to be constrained by a simple fact: and that is that the early promise of a single ministry of education and labour was not to materialise. Neither the Study Team Report nor the Consultative Document sufficiently acknowledges the massive consequences of the bureaucratic and political divisions between education and labour for the operations and goals of the National Qualifications Framework. It is this omission, at best, and dishonesty, at worst, that allows these reports effectively to shift the blame towards SAQA and its conduct, when from the beginning, the grounds for achieving the elevated goals of the Authority were compromised. Why exactly was this unity of organisation and purpose not achieved in a single Ministry? Were the political heads of the respective Ministries aware of the consequences for SAQA and the NQF? What arrangements were made to offset this crucial division so that the work of SAQA and the goals of the NQF were not to be hampered? Was it even possible to pursue these elevated goals with a divided bureaucratic organisation and, on the face of it, a split commitment in politics? It is the failure of the respective reports to grapple with this organisational and political terrain that fundamentally undermines the credibility of their observations and recommendations.

In addition, the two reports fail to account for the compromised terms of the financial context under which SAQA laboured. It is one thing to acknowledge — as the reports do — that securing and managing generous donor funding occupied much of the time of the SAQA leadership; it is a different analysis that calculates the constraints that such external dependence imposed on the confidence and competence to lead on a matter of professed national importance i.e., qualifications reform. This lack of funding from government sent the wrong message: that the NQF was not important enough to enjoy the kind of financial commitment that governments in other contexts take seriously enough for centralized investment. But it also diverted the SAQA Management from other kinds of strategic leadership initiative in which it should have played a leading role.

Finding 3

It is clear that the report has created deep despair and indeed disagreement in the Authority (at least the management and staff) and its structures (such as the National Standards Bodies [NSBs]) with the main findings, and this raises critical questions about the ways in which the study was pursued.

Both the Study Team Report and the Consultative Document have created significant turbulence in the day-to-day lives of the SAQA staff. There are strong feelings of discontent among the staff deriving from uncertainty about individual and organisational futures. These feelings of despair also emanate from a sense of injustice and of non-recognition, a sense of wastage and a sense of being 'let down'. The concerns raised in part, reflect an unfairness of judgment, given the enormous personal investments that SAQA staff has made in taking forward the NQF. They also relate to a sense of being blamed for failure when the inadequacy of resources and perceived inadequacies of political support from the two government departments are not sufficiently taken into account.

If the adequacy of a report is to be judged by its *resonance validity*, then clearly the reviews of the NQF have generated dissonance rather than consensus, on many of the key provisions — not only among SAQA staff, but also among key constituencies such as the Council on Higher Education (CHE, 2003a).

The lack of fairness of representation in the Study Team has also concerned the Inter-National Standards Body Forum members who point out that the weighting of membership was skewed in favour of higher education expertise:

> By contrast, there appeared to be only one member each from the labour (COSATU), SETA (the Mining Qualifications Authority) and business (Chamber of Mines) sectors respectively. While the Study Team was clearly and appropriately constituted as a technical team rather than a stakeholder body, expertise and experience from the labour and industry sectors could have been drawn on more extensively (SAQA, 2002a:12).

In short, the Study Team Report has drawn strong criticism from immediate stakeholders associated with the NQF with charges about "representivity" and "scapegoating" and "undermining" of SAQA achievements (SAQA, 2002a:12). Given the stakeholder-driven processes associated with the NQF, the inability of the Study Team to reconcile these key constituents behind its report must be marked as a fundamental weakness in the overall investigation.

Finding 4

It is clear that the character and authority of SAQA will change fundamentally as a result of this review, such authority being delegated elsewhere in the national education and training system.

It would be extremely naive to believe that the key recommendations and proposed action on the review report will simply focus on the implementation of the NQF. As the Consultative Document makes clear, it has taken the liberty to move beyond the scope of the review report's recommendations.

Of the 79 recommendations of the Study Team, the following are the most crucial:

1) That standards setting and quality assurance should be combined under a single set of structures.
2) That the qualifications framework should be expanded to ten levels rather than eight.
3) That the (SAQA) Board should be "substantially remodelled" (Task Team, 2003:39), with fewer members constituting this body (no more than 15).
4) That assessor registration should be restricted to workplace learning.
5) That NSBs should be disestablished.
6) That strategic management (under the two government departments) and strategic funding (through negotiations with Treasury) should be implemented.

These recommendations clearly move beyond the 'implementation' brief to the original Study Team by fundamentally altering the size, nature and the scope of authority of SAQA in the following ways:

- Shifting authority from SAQA to three powerful new bodies, the Qualifications and Quality Assurance Councils (QCs).
- Requiring that SAQA take on a broader oversight and co-ordinating function rather than a detailed operational role.
- Recommending that the SAQA Board be reduced in number.

The following acknowledgement in the Task Team report is in many ways an understatement:

> In the light of the proposals for a new NQF architecture, it is apparent that the role of SAQA would change. The most important alteration would be that (once the NSBs have been disbanded and QCs established) SAQA would have much less direct responsibility for the generation of standards and qualifications. However, SAQA would continue to have overall executive responsibility for the development and implementation of the NQF (Task Team, 2003:39).

In reality, the substantive authority for implementing the NQF shifts to the QCs and their corresponding bodies with SAQA left in a somewhat undefined but *largely administrative* role to "coordinate and facilitate the work of the three QCs" (Task Team, 2003:39). It would be a serious mistake for SAQA, in its present form, to underestimate this shift of authority and what it means for the organisation in the future.

Finding 5

It is clear that what is on the table is a political decision in search of justificatory evidence.

Clearly from the documentation, and especially the terms of reference for the Study Team, the decision to review both SAQA and the NQF was taken long before the report was tabled and the recommendations were made. In other words, the terms of reference do not suggest a routine review to determine, in colloquial terms, 'how things were going'. The starting observation was clear:

> In response to widespread anxiety and dissatisfaction among public bodies and stakeholders and in the Departments of Education and Labour, the Ministers were advised early in 2001 that the time was ripe for an independent examination of NQF implementation (Task Team, 2003:1).

In other contexts there was a reference to "a broad malaise of discontent", serious delays and even court action (Study Team, 2002:143).

Similarly:

> The study should examine and advise in particular how to address the concerns among some key social partners and stakeholders about an apparent proliferation of bodies and procedures, and an apparent fragmentation of roles and responsibilities in the areas of quality assurance and national standards development (Study Team, 2002:141-142).

What this means is that the nature and severity of the crisis was already 'a given' in terms that the Study Team had to follow. At the same time, the NQF was out of bounds in the review:

> It [the study] will not be aimed at reviewing the government's goals and policies, but it will examine how the NQF is developing and how we can focus, accelerate and strengthen its implementation (Study Team, 2002:141).

In my considered judgment, it became important that the Study Team affirm the crisis and fix it, rather than conduct an honest intellectual engagement with implementation modalities as suggested in one of the key terms of the brief: "examine … the extent to which the South African Qualifications Authority has put in place the appropriate and relevant policies, procedures, delivery systems, other resources … essential for the establishment of the NQF" (Study Team, 2002:141).

It is important, therefore, to understand both the constraints placed on the Study Team via the departmental interpretation of the brief (e.g. the recorded 'Notes' of such a meeting between senior departmental members from Labour and Education, and members of the Study Team. [Study Team, 2002: 143-146])[11] and the consequences of such a set of constraints for SAQA and the NQF. The decision was made that SAQA and the NQF would be 'fixed' and that the evidence to do this had to be collected. This stance on the part of the commissioning departments might explain in part, why a very different approach to studying some of the same issues could yield a completely opposite conclusion:

> The project has ... successfully [demonstrated] its capacity to change the embedded paradigms of education and training through managing a broad-based stakeholder participation process in building a new system. (Mid-Term External Evaluation of the Technical Support Project to SAQA, 2002).

[11] These 'Notes on an introductory meeting on the focused study of the implementation of the National Qualifications Framework' (Study Team, 2002:143-146) offer a much more telling account of what government really wanted from this review, other than what is contained in the rather anaemic 'terms of reference' (Study Team, 2002:141-142).

Finding 6

It is therefore desirable to decide on the best possible response that retains the impressive intellectual assets built up under SAQA and the basic commitments of the Authority to equity and social justice in the national education and training system (strategic positioning).

The Ministers representing the two departments are clear: "Once comments have been digested and revisions made a policy document will be submitted to Cabinet in 2004 along with a new National Qualifications Framework Bill" (Task Team, 2003:ii). What this means is that there are limits to what can be achieved by challenging the fundamental nature of the Study Team's brief or recommendations, or even the terms of response by the inter-departmental task team. What remain challengeable are minor recommendations within the Consultative Document, including matters such as the location of professional education and training within the Trade, Occupational and Professional Qualifications and Quality Assurance Council (TOP QC) and the need for greater specification with respect to the relationship between unit standards and whole qualifications.

In my view, it would be an error of calculation to over invest time and resources in challenging the basic premises and claims of the two reports. Such miscalculation would divert crucial energies away from dealing with critical issues such as the actual powers of SAQA and the future fate of its personnel after the so-called 'transition' to which the Task Team Report refers. In this respect, it should be the single most important task of the current SAQA Board and Executive to retain the staffing expertise gained through the painful process of establishing the NQF and to ensure that such expertise is located within important postings of the new structures. In this way the expertise and experience of SAQA could both ensure continuity with past efforts under the terms of the new structures and policies for standards generation and quality assurance, and also protect the national investment in capacity development gained through the SAQA personnel. Once again, challenges there should be, especially if this is done in concert with other strategic agencies (such as the Council on Higher Education) who are critical of the Task Team recommendations. But such challenges should be measured and focused on what can be changed otherwise SAQA risks weakening its position within the crucial bargaining processes around the deployment of staff and the securing of knowledge that could sustain the efforts to implement the NQF in terms of its basic commitments i.e., access, mobility, progression, articulation and, of course, integration.

Summary of Findings

In the context of the Terms of Reference for this particular meta-evaluation, the findings could be stated as follows according to the terms outlined on the first page of this document:

1) To assess the strengths and weaknesses of the major review documents and their recommendations.

The strengths of the respective documents include the following: the attention to detail with respect to the implementation of the NQF; the professed attempts to accelerate implementation against the backdrop of stakeholder concerns about efficiency and effectiveness of the NQF processes; the acknowledgment, however brief, about the lack of leadership within the government departments; the concession that funding of the NQF is inadequate; and the care taken in the reports to acknowledge the wide-ranging impact of the work of SAQA and the ownership of the NQF among various constituents.

The weaknesses of the documents can be summarised as follows: the failure to explore fully the structural dilemmas created at the outset — the funding base and separate ministries/departments — that undermined, in significant ways, the very ambitious goals set for SAQA and the NQF; the failure to specify adequately what the new roles and relationships of the existing and new bodies (QCs) would be after the transition; the failure to win the confidence of most of the SAQA staff within the process of arriving at the key recommendations; and the failure to create more open-ended rather than restrictive terms of reference that could have led to different and more acceptable kinds of alternatives than those that are actually recommended.

2) To determine the underlying purposes of these reviews and why they emerged (timing) at this time.

The purpose of the review was to deliver on a political objective that sought a restructuring of SAQA and the NQF in the wake of, it is claimed, widespread stakeholder discontent. The claim that the NQF was not itself under review, as policy, is contradicted by the very recommendations contained in the Consultative Document of the Inter-departmental Task Team; these recommendations lead to a restructuring of SAQA as well as a very different 'architecture' for the NQF.

3) To evaluate the scientific adequacy of the reviews, including their conceptualisation, methodologies, and indicators of measurement and implementation time frames.

The review does not meet the standards of *resonance validity* described earlier in this evaluation. Indeed, the key responses to the two reports — the Study Team Report and the Task Team Report — drew considerable criticism from key constituencies (such as SAQA and the CHE) as well as independent researchers and commentators (such as Michael Young, a member of the original Study Team). Having circumscribed the review to a study of implementation, the recommendations and their 'take-up' in the Task Team move well beyond that narrow ambit, and this could be read as a lack of good faith on the part of the commissioning agency (the two government departments) to the original brief.

4) To map the effects of the proposed interventions on established policy, existing practice and current personnel in the short- and long-term.

The recommendations in both reports could arguably be read as a review of policy and not simply a statement of improved implementation. If this is not the case, it is hard to understand why a new policy document and a revised NQF Bill needs to pass through Cabinet. A more detailed examination of the impact of this study on the original policy infrastructure and commitments of SAQA and the NQF might be of more than academic interest. Clearly, the scope of authority of SAQA will be radically revised and that authority redistributed to the proposed QCs. Staff will be re-assigned within these dispersed new structures and it is hard to believe that there will not be some measure of retrenchment if these proposed positions are finally accepted. There is no evidence, though, that the new practices will overcome the dilemmas attributed to the existing practices, implementation delays, bureaucratisation and design complexity.

5) To suggest alternatives, if any, to the proposed actions and recommendations.

This evaluation proposes considered action on what can be changed within the scope of the report, but that such action is pursued in concert with other agencies and councils connected to the National Qualifications Framework. It would not, however, be a constructive option to question the entire basis of the report and its legitimacy since there is every indication that the decision to implement the streamlined and re-focused SAQA/NQF has already been made in the political terrain. The proposed strategy should be to focus energies on retaining the skills and experience base and on ensuring that the considerable labour invested in the NQF continues to be recognised in the new arrangements for SAQA.

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EDUCATION AND TRAINING IN SOUTH AFRICA AFTER A DECADE OF DEMOCRACY

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Introduction

Paradox and diverse conditions run deep in South African society and pose enormous challenges.

Figures cited in the Human Resource Development (HRD) Strategy for South Africa indicate that between 1975 and 1991, income for the poorest 60 percent of the population dropped by about 35 percent. By 1996, the gulf between the rich and the poor had grown even larger. The poorest 20 percent received 1.5 percent of the total income, compared to the 65 percent received by the richest 10 percent. This clearly inhibits the general ability to finance the enhancement of the skills, education and training so critically necessary to participate in the labour market and by doing so, improve income.

The official literacy rate of 81.8 percent suggests that at least three million South Africans are illiterate. About 67 percent of persons aged 15 years and over and 83 percent of persons aged 15 to 24 have completed Grade 6 (six years of primary schooling) and are considered to be functionally literate – and can participate in the political, economic and social spheres of life only to that extent. While the total population aged 20 and older who completed secondary and higher education increased by 5 percent between 1996 and 2001, one in every three South Africans of the same age had not completed primary school or had no schooling at all.

The population shift from rural to urban areas places high demands on facilities and human resources, especially in informal settlement areas where basic services (water, electricity and sanitation) are mostly inadequate. Poverty, especially in rural areas, prevents a large portion of the population from participating in education and training. Society is haunted by the AIDS pandemic, which is leaving schools in rural areas with declining pupil numbers at intake level. According to a recent report AIDS annually claims the lives of 35 000 teachers. In addition, there is general concern about teachers' professional ethics and commitment and a concerted national strategy to address this is needed. The alarming shortage of teachers especially in

Science and Mathematics aggravates learners' under performance in these subjects in relation to global statistics.

Schools are plagued by a range of factors which are not conducive to the learning and teaching culture so desperately needed to advance society. Unavailability of and access to, facilities and materials (the disproportionate prevalence of which has its roots in unequal funding during the apartheid years) are exacerbated by financial constraints and administrative blundering that cause unacceptable delays in delivery, as well as by learner vandalism. Violence and intimidation of teachers play a sad role in reflecting the state of crime in the wider society. Widespread corruption in the administration (such as ghost teachers) contributes to the undermining of the system.

These and other demands clearly have an impact on both the provision and the quality of education and training in South Africa. And yet, great things are happening.

Transition from the past

Any account of post-apartheid transformation in the South African education and training arena is likely to reflect the 1994 democratic election as its primary axis of incidence and the first decade following this monumental event as the era of turning drawing-board proposals into practice.

The new South African Government has focused its efforts on reconstruction and development. These efforts have led to the significant advancement of a more equitable society, which protects and promotes the interests of all its citizens. If the dual theme of *reconstruction* and *development* underpinned the vision of a transformed society, it was especially educational reform that was driven by these two distinct imperatives: on the one hand to *displace* the legacy of the previous dispensation and replace it with a system promoting democracy, equality and social justice; and on the other to *build* a system which will create and support a culture of lifelong learning in order to prepare South Africans for the challenges of the twenty-first century.

Reconstructing the legacy

The apartheid vision of 'separate but equal education' brought about an extremely fragmented system with management typically top-down and policy-making that was criticised as an exclusive, non-transparent and bureaucratic process. Even when organisational changes occurred, control remained ultimately in white hands. Governance structures and institutions

were duplicated to support racial segmentation. The system lacked co-ordination, a common vision and uniformity in norms, standards and the distribution of resources, including funds, classroom effective teachers, facilities and learning materials. Curriculum content was extremely biased and unresponsive to the changing needs of the labour market, partly due to the over emphasis on theory at the expense of practical skills.

In the five years immediately following the establishment of the new political order, the emphasis was on making a decisive break from the large number of highly fragmented, race-based and unequally funded governing structures and institutions. Key policies and legislation that were developed across many sectors, including the conditions, structures, organisations and institutions which set the scene for transformation, are reflected in Annexure A.

The Constitution of the Republic of South Africa (1996) provides the framework for a unitary system of education and training managed by a national Department of Education (DoE) and nine provincial education departments. The exception is higher education, where the DoE has sole responsibility.

The National Education Policy Act gives the Minister of Education the power to determine national norms and standards for education planning, provision, governance, monitoring and evaluation. The principle of democratic decision-making must be exercised within the context of overall policy goals. Consequently, provincial powers and those devolved by the provinces to the regions, districts and education institutions must be aligned with the goals of equity, redress, quality and democracy. In determining policy, the Minister must take into account the competence of provincial legislators and the relevant provisions of any provincial law relating to education and training.

The Constitution refers to cooperative governance, a principle which underpins the provisions for education and training. Within an agreed national framework, provinces are given a significant degree of autonomy in provision; a decentralisation principle which has been a considerably complex area of transformation. Of particular concern has been the constrained ability of provinces (due to organisational, budgetary and service delivery limitations) to apply national norms based on the principles of equity and redress. However, intergovernmental cooperation is enhanced by the role, reinforced in 2000/2001, of the Council of Ministers (CEM) and of the Heads of Education Departments Committee (HEDCOM).

Building a new system

In the broader context of government strategy, the transformation of the education and training system is explicitly linked to the government's

fundamental human resource development objectives.

The high degree of poverty and inequality that still permeates South African society, places severe limitations on human resource development. Aiming to maximise the potential of South Africans to be productive and competitive in order to achieve an improved quality of life, a high premium is placed on the acquisition of knowledge and skills. In its *HRD Strategy*, the Government of South Africa has adopted an approach, which balances all elements of human resource development, supply, demand and innovation, underpinned by basic education.

To accomplish the goals of an improved United Nations Development Programme Human Development Index, a reduced disparity between the rich and poor and an increased international competitiveness, key strategic plans place strong emphasis on the following:

- a solid foundation, including early childhood development (ECD), general education and adult basic education and training;
- a supply of skills from the further education and training and higher education and training sectors, which anticipate and respond to specific skills needs in society, through increased and better-targeted public and private sector participation in lifelong learning; and
- a research and innovation sector which supports industrial and employment growth.

It is realised that the demands of an increasingly competitive global environment ultimately require education and training of the best possible quality in a culture of lifelong learning.

The establishment of a National Qualifications Framework

The National Qualifications Framework (NQF) is a key vehicle for turning the idea of quality lifelong learning into practical reality. The NQF came into being through the *South African Qualifications Authority Act* (1995) and is the following:

- *national*, since it is a resource brought together by and intended for the whole nation, as well as a reflection of nationally recognised education and training achievements;
- about *qualifications*, since it aims at the recording of learner achievements; and
- a conceptual *framework*, setting the boundaries (principles and guidelines) within which development and implementation of an education and training system are carried out.

The primary objective of the NQF is an integrated approach to education and training in one national system, while opening up both access and possibilities for articulation and mobility within the system, through the portability of accumulated credits. In acknowledging that learning is neither restricted to a single learning site nor to limited learning sites, it allows for multiple pathways to the same learning ends[12] These are expressed in terms of competencies (learning outcomes) and in this respect they emphasise the importance of the recognition of all prior learning. This is of special importance given the intent to advance the redress of past discrimination and contribute to the personal development of *each* learner. But the NQF also wants to contribute to the optimal development of society at large and therefore works towards enhancing the *quality* of education and of training.

Relevant regulations make provision for the registration of both qualifications constructed from unit standards[13] and qualifications based on exit level outcomes (i.e., those not constructed from unit standards). Qualifications and unit standards are designed for registration on the NQF in terms of the learning outcomes which the qualifying learner is expected to demonstrate in terms of the following:

- the desired qualities which instil in students the capacity for lifelong learning, regardless of the specific learning area or the content of the learning; and
- specific outcomes to be achieved in a particular learning area, which are contained in unit standards as registered statements of desired out comes and their associated assessment criteria.

The stated outcomes serve as a common guideline for policy makers, curriculum designers, facilitators of learning and learners.

To be registered on the NQF, a qualification must meet the following criteria:

- represent a planned combination of learning outcomes with a defined purpose, intended to provide applied competence and a basis for further learning;
- add value to qualifying learners in terms of status, recognition, marketability and employability;

[12] A very exciting development in this regard is the introduction of learnerships (not to be confused with earlier apprenticeships) covering a range of learning areas and levels of education and training. Learnerships are essentially work-based training programmes comprising a theoretical and a practical (work-based) component, which are registered with and funded by the Department of Labour.
[13] A small, but whole unit made up of the knowledge, skills and attitudes required in a specific area of learning, which may also form a building block towards a whole qualification.

- provide benefits to society and the economy;
- comply with the objectives of the NQF as set out above;
- include specific and critical cross-field outcomes;
- include details of the number and levels of credits prescribed;
- incorporate integrated assessment linked to the purpose; and
- indicate the rules governing the award of the qualification.

A description of each of the eight levels of the NQF is provided by a level descriptor, the purpose of which is to assist a writer of standards or qualifications in the design process, by doing the following:

- linking these to a level; and
- formulating outcomes and criteria for assessment to indicate the level of knowledge required of a learner to achieve the particular standard or qualification.

In registering qualifications and standards on specific levels of the NQF in line with level descriptors, they are assigned a particular credit value. It is possible for learners to accumulate credits towards a qualification over time.

The role of the South African Qualifications Authority

The South African Qualifications Authority (SAQA) is a statutory body comprising 29 members appointed jointly by the Ministers of Education and Labour. SAQA is mandated in terms of the SAQA Act (No. 58 of 1995) to oversee the development and implementation of the NQF (Annexure B).

In overseeing the *development* of the NQF, SAQA has, in accordance with legal requirements, formulated and published policies and criteria for the registration of bodies responsible for the establishment of education and training standards and qualifications (National Standards Bodies and Standards Generating Bodies), as well as for the accreditation of bodies responsible for the monitoring and auditing of learning achievements in terms of such standards and qualifications (Education and Training Quality Assurance Bodies).

The *implementation* of the NQF is overseen by ensuring the registration and accreditation of the bodies referred to above, as well as by the assignment of functions to these bodies. In addition, national standards and qualifications are registered on the framework and steps taken to ensure that requirements for accreditation are complied with. In the course of fulfilling its mandate, SAQA has developed and maintains the following:

- a national standards setting system for locally recognised and internationally comparable education and training standards in respect of

all levels of education and training;
- a national quality assurance system to ensure that education and training is delivered according to the set standards; and
- an electronic management information system (the National Learners' Records Database, [NLRD]), which records all the relevant information on the achievements of individual South African learners, as well as on registered qualifications and standards.

In addition to these deliverables, SAQA pursues the achievement of NQF objectives through the following:

- the contribution of its Centre for the Evaluation of Educational Qualifications, which was transferred from the Human Sciences Research Council in 1999 and continues to advise on the recognition of foreign qualifications in the South African context; and
- its leadership role in developing implementation guidelines for both Recognition of Prior Learning (RPL) and the recognition of short courses.

Overview of the structure

Although considerable progress has been made towards implementing a new system, education and training in South Africa is still in a transition phase. A number of features of the proposed system still need to be realised. The overview below focuses mainly on the proposed system with an indication, where appropriate, of its relation to the system which is being phased out (for comparison, see Annexure C).

Education and training in the context of the NQF

The formal education and training system in South Africa, as defined under the National Qualifications Framework (NQF), is made up of following three broad bands:

- General Education and Training (GET) band, which incorporates a reception year (Grade 0) and learners in the compulsory phase of schooling up to Grade 9, as well as adult basic education and training organised in four levels of progression.
- Further Education and Training (FET) band, which is the post-compulsory sector that precedes Higher Education and Training, and comprises Grades 10 – 12 of secondary school education, out-of-school youth and adult learners. Technical, youth and community colleges and agricultural colleges, as well as a range of other industry-based and

non-formal providers also fall within the FET band.

- Higher Education and Training (HET) band, which refers to all degrees, diplomas or occupational certificates, up to and including postdoctoral degrees awarded by public and registered private higher education institutions.

The NQF structure makes provision for eight levels, of which general and further education make up the first four levels and Higher Education and Training the rest.

According to specifications in the relevant regulations, a total of 120 or more credits are required for a qualification to be registered at any of the eight levels (see the following diagram). A minimum of 72 credits must be obtained at or above the level at which the qualification is registered.

NQF Level	Qualification Type	Band
8	Doctorates/ Post-doctoral Research Degrees Master's Degrees	Higher Education and Training
7	Honours Degrees Professional Qualifications	
6	National First Degrees National Higher Diplomas	
5	National Diplomas National Certificates	
Further Education and Training Certificate (FETC)		
4	National Certificates Grade 12	Further Education and Training
3	National Certificates Grade 11	
2	National Certificates Grade 10	
General Education and Training Certificate (GETC)		
1	National Certificates Grades 1 - 9	Adult Basic Education and Training (ABET) Levels 1 - 4	General Education and Training

General Education and Training (NQF Level 1)

The learning undertaken in the General Education and Training (GET) band of the NQF (either through nine years of formal schooling, or the alternative route of Adult Basic Education and Training) forms the basis for Further Education and Training.

In the formal schooling system the GET band incorporates seven years of primary and two years of lower secondary schooling, organised into the following three phases:

- Foundation Phase of three years (Grades 1-3). An additional year of pre-primary schooling or Early Childhood Development (ECD) called Reception Year or Grade 0 will be phased in as part of the formal system
- Intermediate Phase of three years (Grades 4-6)
- Senior Phase of three years (Grades 7-9)

The General Education and Training Certificate (GETC), a full qualification registered on Level 1 of the NQF, will be awarded for the first time in 2008. It will be awarded by Umalusi[14] the General and Further Education and Training Quality Assurance Body (previously the South African Certification Council). The purpose of the GETC will be to give access to learning in the Further Education and Training band. A minimum of 120 credits (of which at least 72 must be at NQF Level 1) will be required for the award of the GETC and will need to be composed as follows:

- *Fundamental:* a minimum of 36 credits at NQF Level 1:
  - 20 in Communication Studies and Language[15]
  - 16 in Mathematics / Mathematical Literacy
- *Core:* a minimum of 54 credits (of which at least 30 must be at NQF Level 1) in four of the following learning areas:
  - Arts and Culture
  - Communication Studies and Language
  - Economic and Management Sciences
  - Human and Social Sciences
  - Life Orientation
  - Natural Sciences
  - Technology
- *Elective*: a minimum of 30 credits (of which at least 10 must be at NQF Level 1) from the following learning areas:
  - Agriculture
  - Ancillary Health
  - Environmental Management
  - Food and fibre processing
  - Small, Medium and Micro Enterprises
  - Tourism

[14] Umalusi is the Nguni word for 'shepherd', or in the African context, 'guardian of the family assets'.
[15] Credits should be obtained in one of the 11 official South African languages (Afrikaans, English, Sepedi, Sesotho, Setswana, siSwati, Tshivenda, Xitsonga, isiXhosa or isiZulu,), or in one of the languages promoted by the Pan South African Language Board (the Khoi, Nama and San languages, or sign language).

Learners who do not meet the requirements for the award of the GETC will be issued with a statement of achievement reflecting the credits obtained or the outcomes achieved.

Further Education and Training (NQF Levels 2-4)

After completion of the GET band, the Further Education and Training (FET) band is entered. It comprises all education and training from NQF Levels 2 to 4 (the equivalent of grades 10 to 12 in the academic school system and of the N1 to N3 phases in technical colleges). It equips learners with knowledge, skills and values for participation in and contribution to society and provides the basis for learning in Higher Education and Training.

Learners may follow various pathways to achieve the Further Education and Training Certificate (FETC), namely the general academic pathway, the general vocational pathway and the trade/occupational pathway. They will also be able to gain access, horizontally and vertically, to various equivalent and further learning pathways.

- *The general academic pathway:* This is general formative education based on a broad curriculum and organised into the subjects reflected in Annexure D. It is offered by all schools and some colleges.
- *The general vocational pathway:* These programmes will lead to learning outcomes, packaged into unit standards that cover broad vocational skills and prepare learners for work (including self-employment) in small-medium- and micro-enterprises. It will be offered mainly by FET colleges.
- *Trade/occupational pathway:* These programmes will lead to learning out comes, packaged into unit standards that include learnerships and are designed to meet the needs of local communities and of the workplace. The pathway will be offered by colleges and industry-based providers.

Qualifications in the FET range will differ from each other in the sense that they will spread across a spectrum from more diverse qualifications with greater exchange value to more specific qualifications with greater use value. Equal recognition of the variety will be facilitated through rules of combination. A minimum of 120 credits will be required for the award of the FETC. These must include the following:

- a minimum of 20 compulsory credits in Language and Communication (which must be obtained in one of the 11 official languages); and
- 16 credits in Mathematic/Mathematical Literacy (which must be at, or above NQF Level 4).

Credits must be obtained in all of the fundamental, core and elective learning components.

FET in schools

The minimum entrance requirement for entry into Grade 10 is a GETC (including Adult Basic Education and Training [ABET] Level 4), or an equivalent qualification obtained at NQF Level 1, (for example obtained through the recognition of prior learning [RPL]). As the GETC is not yet in place, entrance into Grade 10 is based on a statement of attainment in Grade 9.

It is expected that in 2008, *the Further Education and Training Certificate* (FETC) will replace the Senior Certificate as the final school-leaving certificate.

- The FETC for schools consists of a minimum of 126 credits and is a Level 4 (Grade 12) qualification;
- All 126 credits based on subjects offered in Grade 12;
- Credits are not accumulated in Grades 10 and 11;
- Level 4[16] is the only exit point for FET (school) learners; and
- *School learners who exit the FET general academic pathway prior to Level 4 will receive a statement of learning outcomes (provided Level 2 and 3 outcomes are registered with SAQA) from the school attended indicating the grading obtained*

According to the FET rules of combination, the requirements for the FETC (schools) are as follows:

Learning Component	Subjects	Credit Value
Fundamental	Two languages, one at Primary and the other at Primary or First Additional Level Mathematical Literacy Life Orientation	2x20=40 20 6 (66)
Core	At least two subjects from one learning field out of B-F*	2x20=40 (40)
Elective	At least one subject from one learning field out of A-F*	20 (20)

*See Annexure D

Senior Certificate subjects that have not been converted into OBE format, and subjects offered by other recognised examining bodies[17], may only be offered as an elective learning component, or as additional subjects. As from 2004, FET learners in schools may not offer current N1 to N3 National Certificate, National Intermediate and National Senior Certificate subjects. There are concessions for immigrants who have completed recognised learning, as well as for learners who experience barriers to learning.

[16] This is in contrast with FET in the other pathways, in respect of which qualifications will be awarded at NQF Levels 2 and 3 as well.
[17] A maximum of one subject from another examining body, which must be recognised by the Department of Education and accredited by the General and Further Education and Training Quality Assurance Body, Umalusi.

To facilitate the transfer between current and OBE based practice, assessment will be conducted in terms of a combination of mark allocation and criterion-referenced descriptors. For this purpose, the following classification scheme for the translation of marks to descriptors has been developed for Grades 10 to 12:

Grading	Marks	Desciptors
1	0 - 39	Not achieved
2	40 - 49	Partially achieved
3	50 - 64	Achieved
4	65 - 79	Achieved with merit
5	80 - 100	Achieved with distinction

To gain credit for a subject, learners will be required to attain a final grading of 3 (achieved) or above. For the award of the FETC (Schools), credit must be attained in the fundamental learning components, in two core subjects and in one elective subject. A maximum of one subject in the core or elective component may be condoned if a grading of 2 has been attained.

FET in colleges

The Department of Education is still in the process of developing a curriculum framework for FET colleges. A fairly broad focus is envisaged in this regard. The FET phase must prepare learners for economic participation, citizenship and possible continuation with higher education, with room for horizontal links among the general academic, general vocational and occupational pathways. Whereas schools will offer general academic and general vocational studies, colleges will concentrate on general vocational and occupational education and training.

A major step towards transformation in the FET sector was made by the merging of the existing 152 technical colleges (previously stereotyped as inefficient, under resourced and the second best option for under-achievers to learn a trade) into 50 multi-campus FET colleges. These colleges will do the following:

- interact with and respond to all relevant sectors of society in order to provide learners with high-quality skills relevant to the job market;
- offer diverse programmes relating to business, industry and community needs; and
- provide students with counselling and support services, including job placement.

Higher Education and Training (NQF Levels 5 – 8)

The *Higher Education Act*, 1997, repealed a number of Acts which had regulated higher education for many years, namely the Universities Act, 1955, the Tertiary Education Act, 1988 and the *Technikons Act*, 1993. The new Act regulates the following:

- the relationship between universities and technikons and the State in a framework within which higher education institutions enjoy autonomy within the context of public accountability and the national need for advanced skills and scientific knowledge; as well as
- the establishment, governance (through independent councils and senates) and State funding of public higher education institutions.

It addition it provides for the accreditation and registration of private higher education institutions and for the Council on Higher Education (CHE) which has the following main functions:

- to advise the Minister of Education on any aspect of higher education;
- to promote quality assurance in higher education;
- to audit the quality assurance mechanisms of higher education institutions; and
- to accredit programmes of higher education (also for funding purposes).

Furthermore, the Act provides for far-reaching restructuring in the formal higher education sector, inclusive of universities, technikons and colleges. Following the new legislation, significant documents have been produced containing comments on and specific proposals for restructuring. The *National Plan for Higher Education* (Ministry of Education, 2001a) was shaped by proposals of the Council on Higher Education, in the document *Towards a New Higher Education Landscape: Meeting the Equity, Quality and Social Development Imperatives of South Africa in the 21st Century* (CHE, 2000) and the responses to it by higher education constituencies and other interested parties.

In April 2001 the Minister of Education established the National Working Group to advise on the restructuring of the institutional landscape of higher education. In their report to the Minister (Ministry of Education, 2001a) the National Working Group recommended, *inter alia*, the consolidation of higher education provision on a regional basis through the establishment of new institutional and organisational forms. This will include the reduction of the number of higher education institutions from 36 universities and technikons to 21 through mergers and incorporations. See the list below of the current universities and technikons.

Current universities
University of Cape Town
University of Durban-Westville
University Fort Hare
Medical University of Southern Africa (Medunsa)
University of Natal
University of the North
University of North-West
University of the Orange Free State
University of Port Elizabeth
Potchefstroom University for Christian Higher Education
University of Pretoria
Rand Afrikaans University
Rhodes University
University of South Africa (Unisa)
University of Stellenbosch
University of Transkei
University of Venda
Vista University
University of the Western Cape
University of the Witwatersrand
University of Zululand

Current technikons
Border Technikon
Cape Technikon
Eastern Cape Technikon
M.L. Sultan Technikon
Mangosuthu Technikon
Technikon Natal
Technikon Northern Transvaal
Peninsula Technikon
Port Elizabeth Technikon
Technikon Pretoria
Technikon Free State
Technikon North West
Technikon South Africa
Vaal Triangle Technikon
Technikon Witwatersrand

In May 2002, Cabinet approved transformation and reconstruction proposals for the restructuring of higher education. These proposals are expected to foster growth and rejuvenation in the sector, especially in parts of the country that had been poorly served in the past. Government will provide an estimated R3.1 billion to fund the merging of higher education institutions and the establishment of a National Higher Education Information and Applications Service. The envisaged higher education institutional landscape in terms of the proposed mergers and incorporation is reflected in Annexure E.

Further restructuring entails the integration and administration of, as part of the higher education and training system, all higher education colleges, including colleges of agriculture, education and nursing that fall under jurisdiction of the provincial administrations. As from January 2001, colleges of education were rationalised and successfully incorporated into the higher education system.

Universities and technikons set their own admission requirements, which have not, as yet, been aligned with the envisaged FETC.

The university sector offers a range of undergraduate and postgraduate degrees and diplomas. Within the ambit of the NQF, a qualification in the higher education and training band is registered as follows:

- a National Certificate at Level 5-8, if it consists of 120 or more credits with 72 credits at or above the level at which it is registered;
- a National Diploma if it consists of 240 or more credits with 72 credits at or above Level 5;
- a National First Degree if it consists of 360 or more credits with 72 credits at or above Level 6.

In addition, the number of credits required for fundamental, core and elective learning must be specified.

University education

Entrance to undergraduate (degree) study at university is, for the interim period, still based on *Matriculation Endorsement* requirements as prescribed by the Matriculation Board of the Committee of University Principals. These entail a Senior Certificate with a minimum aggregate of 950 and passes at Higher Grade in two official languages from one group (including the medium of instruction at a university) plus passes in four other subjects from five groups other than the language group already referred to, of which two

(excluding the first group languages) must also be at Higher Grade. Conditional endorsement to gain university entry may be granted if the following applies:

- there is one outstanding requirement for full endorsement and this is satisfied before proceeding to the second year of a degree course;
- mature age (23 years and over) applies and the candidate is in possession of a Senior Certificate or equivalent; and
- the applicant holds a foreign qualification from a country where university admission is comparable to that in South Africa.

Within the university qualifications structure, provision is made for a range of diplomas, bachelor's degrees, postgraduate honours degrees and diplomas, master's degrees and doctor's degrees. The relationship between these is reflected in the table below:

Qualification	Duration (years)	Admission requirement	NQF Level
Diploma	2	Senior Certificate	
Advanced Certificate (undergraduate)	1	Senior Certificate	
Bachelor's degree			
• General Arts, Commerce, Science	3		
• Education, Fine Art	4		
• Agriculture, Law, Engineering	4	Senior Certificate with	
Pharmacy		Matriculation Endorsement	
• Veterinary Medicine, Architecture,			
Dentistry	5		
• Medicine & Surgery	6		
Honours degree	1	Bachelor's Degree	
Advanced/Postgraduate Certiifcate	1	Degree / Diploma	
Postgraduate Diploma	1	Bachelor's degree	
Master's degree	1-2	Bachelor's degree on Level 7, Honours degree	
PhD degree	2	Master's degree	
Post-doctorate research	-	-	

Technikon education

Technikons (autonomous institutions subsidised by the Department of Education) offer programmes of a career-oriented nature, coupled with supervised experiential learning, as well as applied research programmes at postgraduate level.

Generally the Senior Certificate is the basis for admission. There are, however, additional requirements for some programmes, which usually relate to performance in specific subjects and may even include Matriculation Endorsement.

The qualification structure makes provision for a range of Certificates and Diplomas with frequent exit points, as well as applied degrees at undergraduate

and postgraduate level. Educational programmes offered by technikons cover a variety of specialised occupations and careers in applied engineering, biological, chemical and physical sciences, applied commercial sciences, humanities, arts and teacher education.

Qualification / examples	Duration (years)	Admission	NQF Level
National Certificate	1	Senior Certificate	5
National Higher Certificate	+1=2	Continues from National Certicate	5
National Diploma	+1=3	Continues from National Higher Certificate	6
National Higher Diploma	+1=4	National Diploma	6
Bachelor of Technology			7
Master of Technology	+1=5	MTech	8
Doctor of Technology	+2=7	DTech	8

Teacher training

Teacher training qualifications and programmes are subject to the same processes of registration and accreditation as other Higher Education and Training programmes. In addition, publicly funded teaching qualifications must meet the criteria set by the Minister of Education in the *Criteria for the Recognition and Evaluation of Qualifications for Employment in Education* (2000).

In accordance with the *Norms and Standards for Educators* (2000), previous teaching qualifications in the range certificates, diplomas, higher diplomas and further diplomas will be phased

Qualifications for teaching in schools are tabled below. It is important to note that four-year composite degrees in education (e.g., BA Ed, BSc Ed) and the postgraduate BEd degree previously provided for have been replaced by the Bachelor of Education (BEd) and BEd (Honours) degrees, respectively.

The National Professional Diploma in Education (NDPE) an interim qualification with the intention of affording existing under-qualified teachers the opportunity to access the new framework in the Norms and Standards for educators is not included in the table. The NPDE could be designed and delivered in a flexible manner through units of learning, unit standards, workplace experience, recognition of prior learning (to a maximum of 120 credits), in-service education and training programmes, or learnerships.

Qualification / examples	Duration	Admission	NQF Level
Certificate in Education	1	Senior Certificate	5
Diploma in Education	2	Senior Certificate	5
First Bachelor's Degrees (not in Education)	3-4	Senior Certificate with Matriculation Exemption	6
Postgraduate Certificate in Education	1	"Other" bachelor's degree	6
Bachelor of Education	4	Senior Certificate with Matriculation Exemption	6
Advanced Certificate in Education	1	Various	6
Bachlor of Education (Honours)	1	BEd/ACE	7
Postgraduate Diploma in Education	1	BEd (Hons)	7/8
Master of Education	1-2	BEd (Hons)/PGDE	8
Doctor of Education	2-3	MEd	8

Private higher education and training

The Department of Education (DoE) is involved in an ongoing process of registering private higher education institutions in accordance with the Higher Education Act, 1997. This implies that private higher education institutions are granted legal authority to offer programmes in the Higher Education and Training band. Public institutions are not subject to this process, as their authority is derived from Acts of Parliament and their programmes accredited by the Council on Higher Education.

The purpose of the registration process is to ensure the following:

- private higher education institutions meet the minimum criteria for quality;
- prospective students may confidently enrol with institutions in the private education and training sector, which have the necessary resources, capacity and expertise to deliver quality programmes; and
- qualifications obtained at these institutions are aligned with the NQF.

Currently, the registration process applies exclusively to private higher education institutions which offer programmes resulting in the award of qualifications based on exit level outcomes (certificates, diplomas or degrees pegged at levels 5 to 8 of the NQF).

Conclusion

It has been said that education systems are always under probation. This seems to be particularly true in South Africa, where the system in the process of being implemented is already under review.

Although the NQF is seen as a key accomplishment and a reference point for all new developments, it is also emphasised that its development is an open-ended process, which will continuously change in response to social, cultural and economic needs and technological change.

As some aspects of the implementation of the NQF were characterised by intense debate, tension and even resistance, an independent evaluation of NQF implementation was commissioned by the Ministers of Education and Labour. A Study Team embarked on an investigation of how implementation could be streamlined and accelerated and a report was published in May 2002 containing a range of recommendations for improving the process. In July 2003, following one phase of public comment and inviting another, an Inter-Departmental Task Team has published their joint response to these

recommendations. Proposed changes include the following:

- expanding the NQF from eight to ten levels;
- a 'nested' qualifications model;
- the establishment of three Qualifications and Quality Assurance Councils, responsible for both standards setting and quality assurance in respect of a general, a general vocational and a trade, occupational and professional pathway, respectively;
- three sets of level descriptors for these pathways; and
- a changed role for SAQA.

As an internal initiative to monitor progress, SAQA has recently embarked on a study of the impact of the NQF on the transformation of education and training. The main purpose of this study is to determine the extent to which the objectives of the NQF are being achieved. The first stage of the study intends in particular to establish baseline data of current achievements against the objectives of the NQF and the mandate of SAQA. The model developed through this study will in future serve as a quality management system for the NQF. It is envisaged that the study, using the same indicators established for the baseline, will be used over time to evaluate the implementation of the NQF.

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Annexure A: Key policies and legislation which set the scene for transformation

- **1994**
  - The creation of a **single national Department of Education and nine provincial education departments.**

- **1995**
  - The White Paper, **Education and Training in a Democratic South Africa: First Steps to Develop a New System,** serving as the point of reference for the development of a national unified system based on the principle of integration of education and training.
  - The **South African Qualifications Authority (SAQA) Act**, providing for the creation of a single National Qualifications Framework (NQF) and hence the scaffolding of a national learning system integrating education and training at all levels.
  - The **Employment of Educators Act,** which regulates the professional, moral and ethical responsibilities of teachers and the governance of the previously divided teaching force under one Act of Parliament and one professional Council.

- **1996**
  - The **Constitution**, requiring that education be democratised in compliance with the values of human dignity, equality, human rights and freedom, non-racism and non-sexism.
  - The **National Education Policy Act**, designed to inscribe in law the policy, legislative and monitoring responsibilities of the Minister of Education and to formalise the relations between the national and provincial authorities.
  - The **South African Schools Act,** intended to promote access, quality and democratic governance in a schooling system which makes schooling compulsory for children aged seven to 14 and provides for two types of schools: independent and public.
  - **Curriculum 2005,** pursuing curriculum models aligned with the NQF and a shift to learner-centred, outcomes-based learning and teaching.

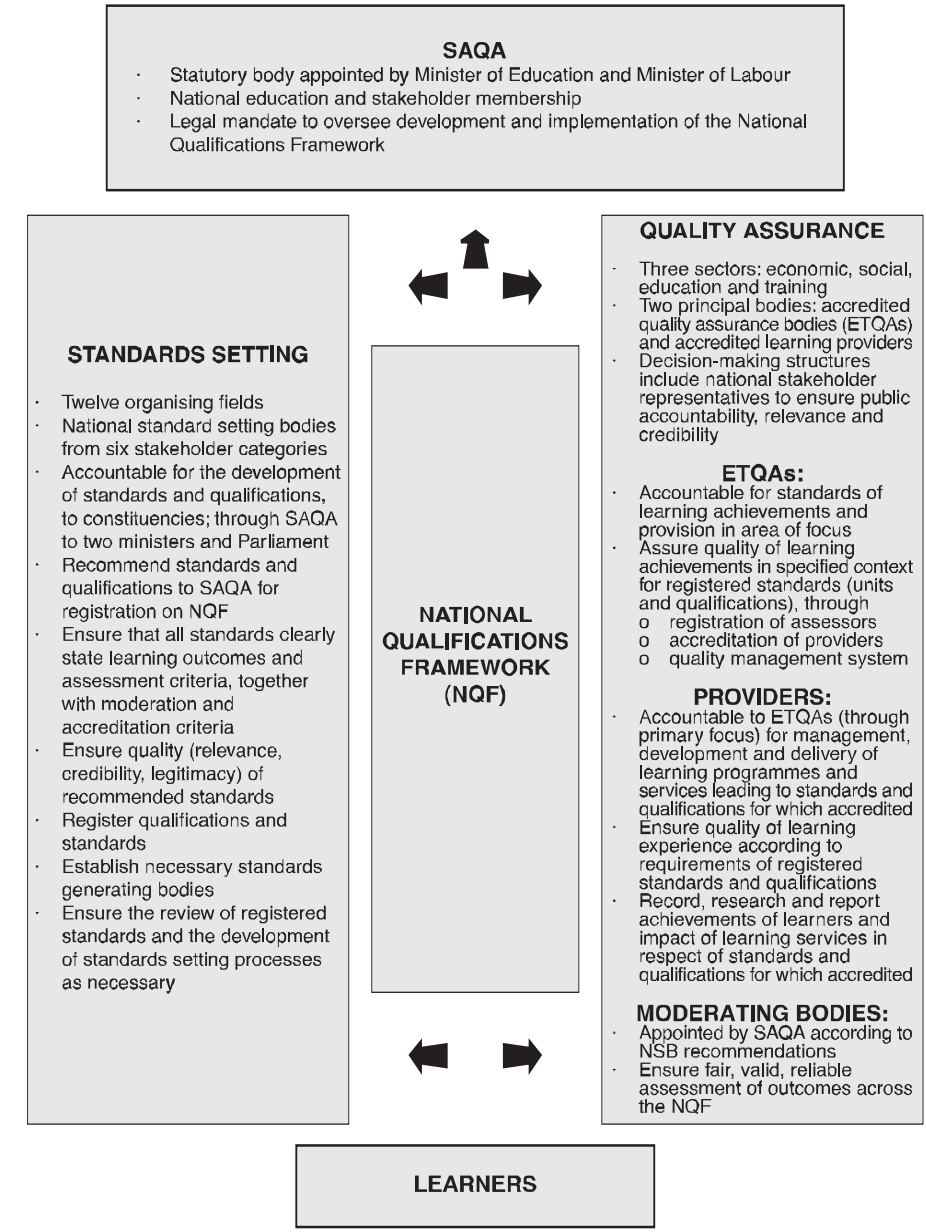
- **1997**
  - The **Higher Education Act**, providing for a unified and nationally planned system of higher education and a statutory Council on Higher Education, which advises the Minister and is responsible for quality assurance and development in respect of public and private higher education and training institutions.

- **1998**
  - The **Further Education and Training Act**.
  - The **Education White Paper 4 on Further Education and Training.**

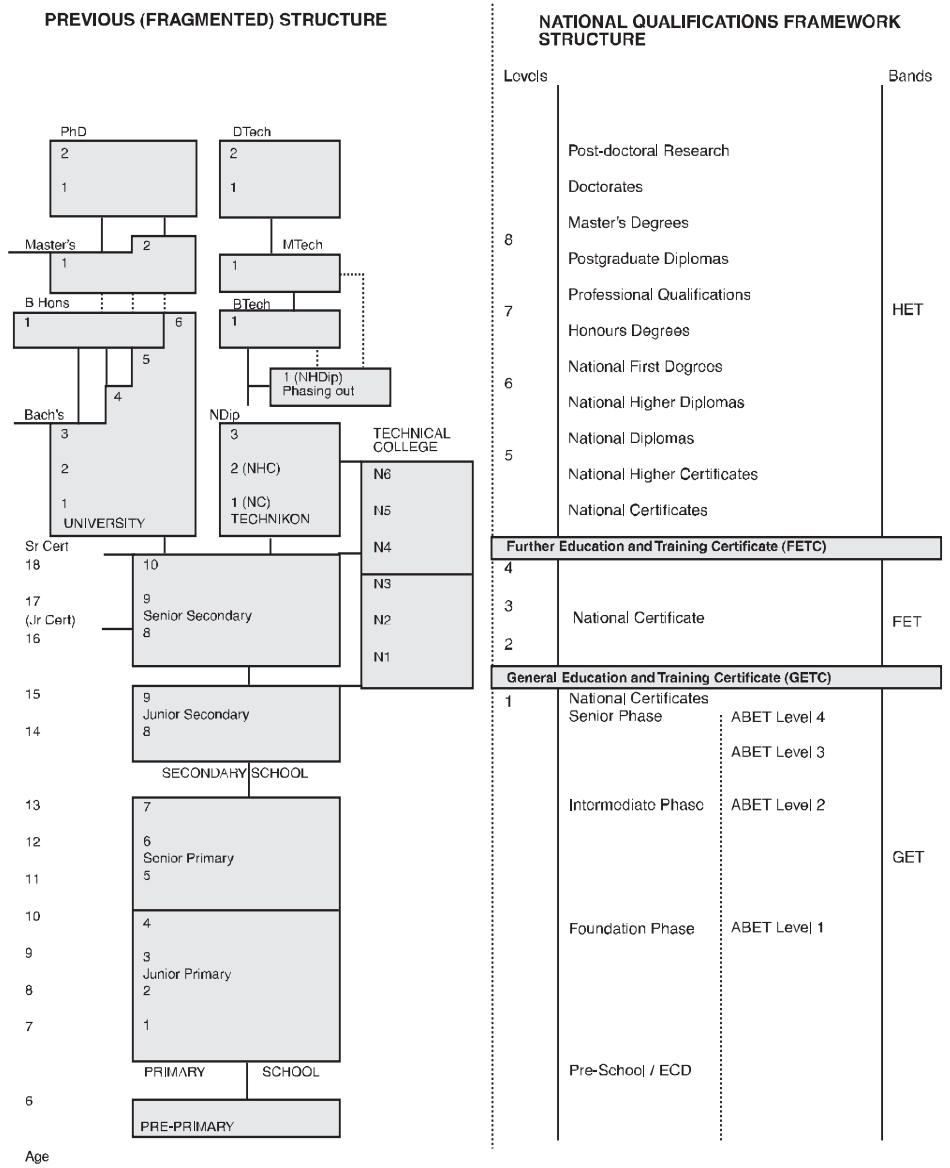
- **1999**
  - The **National Strategy for Further Education and Training 1999-2001,** providing, together with the two mentioned under 1998, for the development of a single, nationally coordinated FET system incorporating a range of institutions, amongst which (senior) secondary schools and technical colleges.
  - The Skills Development Act, which makes provision for
    - the establishment of a **National Skills Authority (NSA)**;
    - skills programmes and a new form of labour market responsive training called **learnerships;**
    - **Sector Education and Training Authorities (SETAs),** responsible for the planning, organising, management, monitoring, funding and evaluation of education and training in 25 specific economic sectors; and
    - the **National Skills Fund**, which finances national skills priorities.
  - The Skills Development Levies Act, which establishes a levy-grant funding framework to finance skills development.

- **2000**
  - The **Adult Basic Education and Training Act**, providing for the establishment of public and private learning centres and quality assurance mechanisms for the sector.

Annexure B: The role of the SAQA in standards setting and quality assurance



Annexure C: System of education and training in South Africa under reform



Annexure D: Subjects in OBE format in the FETC (schools) according to learning fields

GRADE 10	GRADE 11	GRADE 12	SUBJECT	CREDITS
A COMMUNICATION AND LANGUAGE STUDIES				
			Afrikaans Primary Language	20
			Afrikaans First Additional Language	20
			English Primary Language	20
			English First Additional Language	20
			IsiNdebele Primary Language	20
			IsiNdebele First Additional Language	20
			IsiXhosa Primary Language	20
			IsiXhosa First Additional Language	20
			IsiZulu Primary Language	20
			IsiZulu First Additional Language	20
			Sepedi Primary Language	20
			Sepedi First Additional Language	20
			Soswati Primary Language	20
			Siswati First Additional Language	20
			Sesotho Primary Language	20
			Sesotho First Additional Language	20
			Setswana Primary Language	20
			Setswana First Additional Language	20
			Tshivenda Primary Language	20
			Tshivenda First Additional Language	20
			Xitsonga Primary Language	20
			Xitsonga First Additional Language	20
B ARTS AND CULTURE				
			Dance (Dance Studies)	20
			Design and Graphic Art (Design)	20
			Music	20
			Speech and Drama (Dramatic Arts)	20
			Visual Arts	20
C BUSINESS, COMMERCE AND MANAGEMENT STUDIES AND SERVICES				
			Accounting	209
			Business Economics	20
			Economics	20
			Home Economics (Consumer Studies)	20
			Hotel Keeping and Catering (Hospitality Studies)	20
			Travel and Tourism (Tourism)	20
D MANUFACTURING, ENGINEERING AND TECHNOLOGY				
			Electrician Work (Electrical Technology)	20
			Motor Mechanics (Mechanical Technology)	20
			Technical Drawing (Engineering Graphics)	20
E HUMAN AND SOCIAL STUDIES AND SECOND ADDITIONAL LANGUAGES				
			Geography	20
			History	20
			Afrikaans Second Additional Language	20
			English Second Additional Language	20
			IsiNdebele Second Additional Language	20
			IsiXhosz Second Additional Language	20
			IsiZulu Second Additional Language	20
			Sepedi Second Additional Language	20
			Siswati Second Additional Language	20
			Sesotho Second Additional Language	20
			Setswana Second Additional Language	20
			Tshivenda Second Additional Language	20
			Xitsonga Second Additional Language	20
F PHYSICAL MATHEMATICAL, COMPUTER, LIFE AND AGRICULTURAL SCIENCES				
			Physical Science (Physical Sciences)	20
			Computer Studies (Information Technology / Computer Sc)	20
			Mathematics	20
			Mathematical Literacy	20

Annexure E: Envisaged merged Higher Education institutional landscape

Universities (12)	· University of Cape Town	Current
	· University of Durban-Westville / University of Natal	2004
	· University of Fort Hare / Rhodes University East London Campus	2004
	· University of the Free State / Qwa Qwa Campus of University of the North / Vista University Bloemfontein Campus	2004
	· University of the North-West / Potchefstroom University for CHE / Vista University Sebokeng Campus (students & staff)	2004
	· University of the North / Medical University of South Africa (Medunsa)	2005
	· University of Pretoria / Vista University Mamelodi Campus	2004
	· Rhodes University	Current
	· University of Stellenbosch	Current
	· University of the Western Cape	Current
	· University of the Witwatersrand	Current
Technikons (5)	· Cape Technikon / Peninsula Technikon	2005
	· Durban Institute of Technology / Mangosuthu Technikon / Umlazi Campus of the University of Zululand	2005
	· Free State Technikon / Vista University Welkom Campus	2004
	· Technikon Northern Gauteng / Technikon North-West / Technikon Pretoria	2004
	· Vaal Triangle Technikon (incorporating infrastructure & facilities of Vista University Sebokeng Campus)	2005
Comprehensive Institutions (6) (offering technikon and university type programmes)	· Border Technikon / Eastern Cape Technikon / University of Transkei	2005
	· Rand Afrikaans University / Technikon Witwatersrand / Vista University East Rand & Soweto Campuses	2005
	· University of Port Elizabeth / Port Elizabeth Technikon / Vista University Port Elizabeth Campus	2005
	· University of Zululand	Current
	· University of South Africa (Unisa) / Technikon South Africa / Vista University Distance Education Campus	2004
	· University of Venda	Current
National Institutes for Higher Education[18] **(2)**	· Mpumalanga Institute for Higher Education	Future
	· Northern Cape Institute for Higher Education	

[18] To be established in the two provinces without any higher education institutions

Example of an exit level outcome:

Certificate: Tourism Management NQF level 5 SAQA qualification ID: 36030 Regular provider qualification based on exit level outcomes and assessment criteria
Exit level outcome 7: Demonstrate an understanding of the dynamics of the interrelated sectors of the tourism industry **Associated assessment criteria:** 7.1 Describe the composition of the tourism industry 7.2 Describe the different sectors of the tourism industry 7.3 Describe the roles and interrelationships between the tourism sectors 7.4 Identify trends in the tourism industry

The assessment should therefore focus on the extent to which a learner can describe the interrelationship of the different sectors of the tourism industry, and the quality of the evidence is detailed in the assessment criteria. In this case for example, the learner is not required to do an in-depth analysis of the different sectors of the industry, but to demonstrate an understanding of them.

2) Determining 'equivalence of learning'

As noted before, learners who approach a provider/institution for recognition of their prior learning do not arrive with pre-packaged pieces of learning that can simply be matched against the learning outcomes of a qualification. Prior learning is often unstructured, tacit and intuitive. It is the task of the practitioner to assist learners to identify equivalences to the evidence required to prove applied competence. In order to do so, the practitioner must identify such equivalences. This requires an in-depth understanding of the applied competence and the purpose of the qualification. Rather than assessing each discrete part of a qualification, as would take place in a formal institutional environment, the RPL learner will be assessed on *the integrated understanding* of the learning field. To illustrate the difference, the Certificate Tourism Management will be used as an example. Some of the exit level outcomes and associated assessment criteria are the following:

Exit level outcome	Associated assessment criteria
4. Apply basic entrepreneurial skills	4.1 Research feasibility of a business idea 4.2 Do basic market research 4.3 Produce a basic business plan to efficiently manage a business
5. Apply basic knowledge and skills	5.1 Demonstrate knowledge of basic economic principles and policies 5.2 Assist in the organization of management functions
6. Implement and produce proper financial management accounts	6.1 Compile and process accounting data of a going concern 6.2 Financial transactions are correctly recorded in a general ledger 6.3 A trial balance is correctly drawn up 6.4 Account for assets and liabilities 6.5 Compile company annual financial reports

2.1.) Level descriptors and critical cross-field outcomes

The level descriptor is "that statement describing learning achievement at a particular level of the NQF" (SA, 2003:3).

The level descriptor is a generic statement about the breadth and depth of learning that will indicate applied competence required at a particular level. This could be considered the 'broadest' understanding of a qualification at that level. To continue with the example, for level 4 on the NQF the generic description of learning required is as follows:

Applied Competence	**Autonomy of Learning**
A learning programme leading to the award of a qualification or unit standard at NQF level 4 shall develop learners who demonstrate competence with regard to:	
a. A fundamental knowledge base of the most important areas of one or more fields or disciplines, in addition to the fundamental areas of study; b. An informed understanding of the key terms, rules, concepts, established principles and theories in one or more fields or disciplines; c. An understanding of the organization or operating environment as a system within a wider context; d. An ability to apply essential methods, procedures and techniques of the field or discipline; e. An ability to apply and carry out actions by interpreting information from text and operational symbols or representations; f. An ability to use their knowledge to solve common problems within a familiar context; g. An ability to adjust an application of a common solution within relevant parameters to meet the needs of small changes in the problem or operating context; h. An ability to motivate the change using relevant evidence; i. A basic ability in gathering relevant information, analysis and evaluation skills; and j. An ability to communicate and present information reliably and accurately both in writing and verbally.	A capacity to take responsibility for their own learning within a supervised environment; A capacity to take decisions about and responsibility for actions; A capacity to evaluate their own performance against given criteria; and A capacity to take the initiative to address any shortcomings they find.

When assessing prior learning, the asessment instrument(s) should therefore be aware of the extent to which the learner has the following:

- fundamental knowledge of a specific field of learning and fundemental knowledge that will enable further learning
- knowledge of the rules, principles and theories relevant to specific field of learning
- the ability to understand his/her operating environment

- knowledge of the procedures and techniques particular to the field of learning
- the skills to collect, interpret and use information and operational symbols in the field of learning
- the skills to use their knowledge to solve problems and to adjust to changes in their field of learning
- the skills to use their knowledge to solve problems and to adjust to changes in their field of learning
- the ability to communicate in writing and verbally

These level descriptors relate very closely to the critical cross-field outcomes, which every qualification should try to achieve. The table below lists the agreement between the level desciptors and the critical cross-field outcomes:

Level descriptor and autonomy of learning (paraphrased)	**Critical cross-field outcomes** (paraphrased)
The skills to use their knowledge to solve problems and to adjust to changes in their field of learning	Identifying and solving problems
An understanding of the organization or operating environment as a system within a wider context	Working as a member of a team
A capacity to take responsibility for their own learning within a supervised environment	Managing oneself and taking responsibility for one's actions
The skill to collect, interpret and use information and operational symbols in the field of learning	Collecting, analysing and evaluating information
The ability to communicate in writing and verbally	Communicate effectively
Knowledge of the procedures and techniques particular to the field of learning	Using science and technology appropriately and showing responsibility to the environment and others
Understand his/her operating environment	Understand the world as a set of related systems
Fundamental knowledge of a specific field of learning and fundamental knowledge that will enable further learning	Reflecting on own learning
An understanding of the organization or operating environment as a system within a wider context	Culturally and aesthetically sensitive
Knowledge of the rules, principles and theories relevant to a specific field of learning;	Explore education and career opportunities
Fundamental knowledge of a specific field of learning and fundamental knowledge that will enable further learning	Entrepreneurial opportunities

The purpose of level descriptors is to "ensure coherence across fields of learning" and to "facilitate the assessment of the international comparability of standards and qualifications" (SA, 2003:3).

With an understanding of the generic level, breadth and depth of learning

required of a learner at a particular level, coupled with an understanding of the critical cross-field outcomes to be achieved through all qualifications, a picture is emerging of what should be assessed for RPL.

2.2.) Qualification type and designated variant

With an understanding of the broadest purpose of qualifications, the assessment of prior learning becomes increasingly possible. This means that if a learner can prove applied competence, regardless of where the competence was acquired, then his/her learning can be considered equivalent to the learning required for a full-time learning programme. However, as noted before, assessment of prior learning does not take place in a vacuum – credits and/or exemptions will always be awarded in relation to a particular qualification or (sets of) unit standards. In order to determine what will tell the assessor that the learner has achieved applied competence, his/her learning will be benchmarked against a qualification (or group of related qualifications). This is achieved by understanding the requirements for a particular qualification within a level, and the specific variant (or specialisation) of that qualification.

The description of the qualification type, for example the Certificate at NQF level 5 is described as follows:

> This qualification signifies that the learner has attained a basic level of knowledge and competence in a particular field or occupation and is capable of transferring this knowledge and skill to an occupation or role in the workplace. The learning outcomes specified for specialisations of this qualification type will meet the competences described in the descriptor for Level 5 in contextualised form (CHE, 2001:73).

The designated variant will indicate the area of specialisation, in this case Tourism Management.

These three aspects: the level descriptor, the critical cross-field outcomes and the qualification descriptor, provides the basis for an integrated, holistic assessment approach appropriate for the assessment of prior learning.

3) What should be assessed to determine applied competence?

For this part of the paper, the qualification Certificate: Tourism Management will be used.

Now that we know what 'applied competence' means in relation to a particular level of qualification, as well as in relation to the qualification descriptor and the critical cross-field outcomes, we see that we should assess the following:

- The extent to which fundamental knowledge of the field of learning can be demonstrated, for example in terms of the Certificate: Tourism Management:
  - *An understanding of the interrelated nature of the sectors in the tourism industry;* and
  - *Knowledge of the legal and ethical principles applicable to the tourism industry, e.g. the Tourism White Paper (Assessment criterion 8.1) and responsible and sustainable tourism (Assessment criteria 8.2 and 8.3).*
- Knowledge of the rules, principles and theories relevant to a specific field of learning, for example in terms of the Certificate: Tourism Management:
  - *Demonstrate knowledge of basic economic principles and policies (Assessment criterion 5.1);*
  - *Describe the composition of the tourism industry (7.1);*
  - *Describe the different sectors, their roles and interrelationship between tourism sectors (7.2 and 7.3); and*
  - *Identify trends in the tourism industry (7.4)*
- Understanding of his/her operating environment, for example in terms of the Certificate: Tourism Management:
  - *Explain the physical/environmental impact of tourism (9.1);*
  - *Describe managerial/environmental strategies to protect the physical environment (9.2);*
  - *Explain the economical impact of tourism (9.3);*
  - *Explain the social impact of tourism on the local community (9.5);*
  - *Tourism activity is correctly planned (3.1); and*
  - *Organisation of time and resources is outlined (3.2).*
- Knowledge of the procedures and techniques particular to the field of learning, for example in terms of the Certificate: Tourism Management:
  - *Apply the basic management functions in a small tourism activity (3.5);*
  - *Assist in the organisation of management functions (5.2);*
  - *Control measures (3.3);*
  - *Supervising skills (3.4); and*
  - *Operate technological aids used for office administration and communication (2.4).*
- Possession of the skills necessary to collect, interpret and use information and operational symbols in the field of learning, for example in terms of the Certificate: Tourism Management:
  - *Read to interpret and write to produce common formats of written communication (1.1);*

- *Access information through the Internet and use e-mail (2.2 and 2.3);*
- *Research feasibility of a business idea (4.1);*
- *Do basic market research (4.2); and*
- *Produce a basic business plan (4.3).*

· Possession of the skills necessary to use their knowledge to solve problems and to adjust to changes in their field of learning, for example in terms of the Certificate: Tourism Management:
  - *Describe strategies to enhance the economic impact (9.4); and*
  - *Interpret statistics and information about regional, national and international tourism trends (9.6).*

· The ability to communicate in writing and verbally:
  - *Read to interpret and write to produce common formats of written communication (1.1);*
  - *Listen to interpret and speak to produce common formats of oral communication;*
  - *Interpret and produce common formats of non-verbal communication; and*
  - *Use computer software to produce verbal and non-verbal communication (2.1).*

At this stage, the advisor/assessor should have a very good idea of what 'applied competence' is, both in relation to the broad level descriptors, but also in relation to the specific requirements for the qualification. However, as mentioned before, the weighting of the composite parts of the qualification, as derived from the purpose of the qualification, will determine how much each of these parts will 'count' in the final assessment(s). The purpose statement in this particular qualification details three areas of impotance:

(i) The interrelatedness of the tourism industry and the legal and ethical issues thereof
(ii) Management of a tourism activity and customer service
(iii) Entrepreneurial skills to promote economic growth

These three aspects will 'count' most in the assessment(s) and provide guidance as to how assessment should take place.

4) How to assess prior learning i.e. through the identification of appropriate fit-for-purpose assessment instruments for the assessment of applied competence

The next step is to determine how to assess the learning in an appropriate, fit-for-purpose manner. In a full-time classroom context, the most obvious way in which to assess the composite parts of the learning would be by means of tests, assignments, projects and presentations – in most cases in relation to the discrete parts

of the qualification. For the assessment of prior learning a much more holistic and integrated assessment is proposed. With the knowledge of what constitutes applied competence, an assessment instrument (or tool) is designed. For example for the Certificate: Tourism Management, the following research project could be an appropriate tool:

> Conduct **research** into the **feasibility** of a **tourism activity** in a particular context. Your research must culminate in a **report** and an **oral presentation** giving the details of your findings.
> The report must reflect:
> - The proposed tourism activity, based on an analysis of regional, national and international **trends** in the tourism industry as appropriate.
> - The economic, ethical, social and environmental impact of the proposed tourism activity.
> - A business plan detailing the **resources, risk management and financial management** needed to initiate and sustain the activity.
> - The other **role players/partners** that will be needed to initiate and sustain the activity.

A project of this nature will cover most of the exit level outcomes and their associated criteria for the Certificate: Tourism Management, for example each of the highlighted words above, encapsulates a host of the criteria. Refer to the table below:

Highlighted word	Assessment criteria	Exit level outcomes
Research	1.1; 2.2; 4.1; 4.2	Use technology efficiently
Feasibility	1.1; 2.2; 4.1; 4.2; 5.1	Apply basic entrepreneurial skills
Tourism activity	7.1; 8.1; 8.2	Demonstrate an understanding of the dynamics of the interrelated sectors of the tourism industry, the legal and ethical issues and possible impact
Report	1.1; 1.2; 1.3; 2.1; 2.4	Demonstrate verbal and non-verbal communication skills
Oral Presentation	1.1; 1.2; 1.3; 2.3; 2.4	Demonstrate verbal and non-verbal communication skills

Clearly not all assessments will be as straightforward as the above example. Also, it is not necessary to assess everything in one single assessment. A combination of assessment instruments should make up part of a particular assessment methodology. These would include written tests where appropriate. For example, where 5.1 (*Demonstrate knowledge of basic economic principles and policies*) could not be sufficiently demonstrated through the project as given above, a test or additional assignment could be given to assess embedded knowledge. Likewise, for exit level outcome 6 (*Implement and produce proper financial management accounts*) additional assessments may be required. However, the overall weighting of parts of the qualification should be kept in mind when additional assessments are planned. As has been mentioned before, an RPL learner, in the same way as a full-time classroom learner, is not required to meet one hundred percent of the criteria for the achievement of the qualification.

For more information and possible assessment instruments and tools, please refer to the *Criteria and Guidelines for the implementation of RPL* (SAQA, 2003), obtainable from the SAQA website: http://www.saqa.org.za.

Conclusion

Internationally, recognition of prior learning is considered as a feasible mechanism whereby greater participation of non-traditional learners can be enhanced. Not only has it been practised in countries such as the United States of America for more than 30 years, it is increasingly seen in Europe and in other first world countries as a process whereby their workforce can be up skilled and multi-skilled, for greater mobility within workplaces and across sectors. In South Africa, in addition to the abovementioned, RPL has a focus on the transformation and redress contribution that such a system could make. However, RPL as a strategy will fail if it is seen as an 'easy' or 'second-best' route to the achievement of credits or qualifications. For that reason, the assessment of prior learning must be above reproach. However, valid and reliable assessment strategies do not mean tests and examinations. RPL requires that we develop innovative approaches to assessment that not only will enable a reliable judgement of the learners' competence, but also stand up to intellectual scrutiny.

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Annexure A

The following qualifications and unit standards are available on the searchable database at http://www.saqa.org.za

National Certificate: Early Childhood Development. NQF level 4
National Certificate: Generic Project Management. NQF level 4
Certificate: Tourism Management. NQF level 5
Unit Standard: Design and Develop Assessments. NQF level 6

FEEDBACK FORM
SAQA Bulletin Volume 5 Number 1

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