

# **Resources for new ways of learning**

---

**A manual for developers of learning resources**

**Compiled by Christine Randell, SAIDE**

May 2006

### **Limpopo Department of Education**

Khanyisa Support Programme  
Private Bag X 9489  
Polokwane  
0700

Tel: 015 290 6700

Fax: 015 297 6920

Resources for new ways of learning, A manual for developers of learning resources

© Limpopo Department of Education

First published 2006

### **Creative Commons License**

The copyright for this work is held by the Limpopo Department of Education. However, to maximise distribution and application, the work is licensed under the Creative Commons License. This allows you to copy, distribute, and display the work under the following conditions:

- Ⓒ **By attribution.** You must attribute the work in the manner specified by the Limpopo Department of Education.
  - Ⓓ **For non commercial use.**<sup>1</sup> You may not use this work for commercial purposes. Profit-making entities who charge a fee for access to the work are not permitted to copy, distribute and display the work.
  - Ⓔ **No derivative works.** You may not alter, transform, or build upon this work.
- For any reuse or distribution, you must make clear to others the license terms of this work
  - Any of these conditions can be waived if you get permission from the Limpopo Department of Education.

**Guide compiled by:** Christine Randell, SAIDE (South African Institute for Distance Education)

## **Acknowledgements**

This manual has been made possible through the Khanyisa Support Programme which is funded by DFID (British Department for International Development) for the Limpopo Department of Education.

The manual has arisen out of a series of materials development workshops run by SAIDE for educators of FET colleges in Limpopo. Selected resources developed by SAIDE were consulted and the Commonwealth of Learning's Creating learning materials for open and distance learning: A Handbook for Authors and Instructional Designers, COL, 2005, Vancouver, Canada, was a valuable source of information.

---

<sup>1</sup> How does the Limpopo Department of Education define commercial use? A commercial use would involve the assessment of a direct or indirect fee by a for-profit entity for use of the Limpopo Department of Education Creative Commons (CC) materials, or any derivation or modification of the Limpopo Department of Education CC material, or any other commercial exploitation of the Limpopo Department of Education CC materials.

---

# CONTENTS

---

<b>Introduction</b>		<b>1</b>
<b>One</b>	Use of learning resources	<b>4</b>
<b>Two</b>	Overview of the design process	<b>10</b>
<b>Three</b>	Clarify how you will use the learning resources	<b>11</b>
<b>Four</b>	Select suitable resources	<b>15</b>
<b>Five</b>	Decide on the method: create or adapt?	<b>20</b>
<b>Six</b>	Prepare the plan	<b>26</b>
<b>Seven</b>	Make decisions about the assessment	<b>33</b>
<b>Eight</b>	Write, review, refine	<b>42</b>
<b>Toolkit</b>		<b>61</b>

---



---

# INTRODUCTION

This manual brings together the experiences of a team of educators from FET colleges in Limpopo who were involved in the development of an activity guide for Business Administration Level 2.

There are many ways of planning and writing learning materials. The guidelines and methods proposed in the manual offer a way that worked for the team. It is not the final word on the development of learning resources but hopefully the starting point which future experiences can expand on.

We prefer using the term **learning resources** to incorporate the forms of resources that are used in the learning and teaching process. For example, self-instruction learning materials and manuals, course materials used in distance education courses and programmes, notes, articles, excerpts from publications, books, and on line resources. In the manual we focus on print resources because that is what we chose to develop.

An invaluable set of resources from SAIDE, COL, and experienced authors enabled us to add pertinent and practical guidelines throughout.

## **Why this Manual?**

During 2005 SAIDE conducted a series of workshops to build the capacity of a group of educators from FET colleges in course design and learning resource development. From the outset we envisaged the need for a manual that would support people who participated in the workshops as well as their colleagues. The manual is a practical resource that enables us to capture and reformat the various supporting materials we developed for the workshops.

## **Who is it for?**

The manual has two specific audiences in mind. A core team of individuals have emerged as possible trainers to expand and continue the initiative in their own colleges. They can use it to support their training and development efforts in future. Educators in FET colleges have to respond to requests from business and industry to develop suitable learning resources for all kinds of short skills programmes. For them the manual is a self help guide.

Educators and trainers in a variety of education and training settings may also derive benefit from the manual.

It can also be helpful for managers of learning programmes to get an overview of what is involved in the design and development of learning resources.

### How can you get the best out of it?

The manual has been arranged as a practical easy to follow guide which has the following distinctive components:

1. Each of the seven topics starts with a **short reflection** on some of the main challenges of that phase in the design process.
2. Readers are invited to reflect on their own practice and integrate what they are learning as they progress through the manual. This **Reflect and Act** section can be regarded as a learning journal which is threaded through the manual.
3. In some topics **additional information** is included.
4. The **Toolkit** comprises PowerPoint presentation slides, templates, tables, and examples that can be adapted for specific contexts and requirements.

The intention in compiling the manual is to offer a versatile resource that can be used in different ways. Here are some of them:

It provides a helpful introduction to the design process and can be used as part of a staff development programme to orient educators to this important aspect of teaching and learning.

An individual can use it as her or his personal learning journey and work systematically through each topic and responding to the questions in the Reflect and Act block.

A trainer can use sections of the manual and resources from the Toolkit during workshops and training interventions.



## ONE | USE OF LEARNING RESOURCES

With the expansion of technologies students are exposed to a greater variety of learning resources than before. This has created a need for them to learn skills necessary to make good use of the ever widening range of learning resources available to them.

In his chapter, *Helping Students to Learn from Resources* (Brown and Smith (ed) 1996), Phil Race gives reasons why learning resources are used more often now than before:

- We now have larger class sizes in further and higher education, with tighter timetables and overstretched teaching staff.
- As a result of the above, and as a consequence of the information technology revolution, students in many colleges now spend more of their time learning from resources individually.
- With growing recognition of the importance of students developing transferable personal skills, there is more attention to the use of tutor less group work, often using learning resource materials.
- The quality and sophistication of many print based learning resources have increased significantly, and student expectations of learning resource materials have risen accordingly.
- There is growing use of open and flexible learning as part of conventional college based courses as well as in distance learning courses, again dependent not only on the quality of learning resources, but also on the extent to which students develop skills at using such resources.
- The dramatic increase in the usage of electronic and computer based learning systems, including the Internet, adds a new range of learning resources, with corresponding needs for students to become able to learn effectively from them as well as play with them!

In FET colleges as in schools new outcomes based learning programmes that are aligned to the NQF are being introduced. For educators and students alike the challenge is to find new ways of interacting that allows learners to take an active part in acquiring the knowledge and skills they need.

Outcomes based learning:

- focuses on the learners and enables them to participate in the learning process;
- is developmental and integrates theory and practice to enable learners to become competent;
- is an activity-based approach to education which encourages learners to discover things for themselves and helps them to think critically, to analyse situations and to use problem-solving;
- emphasises that the learning process is as important as what is learnt.



So how are educators and learners expected to behave?  
 The table below gives some ideas.

*Table 1*

<b>Educators as facilitators of learning...</b>	<b>Students as self directed learners...</b>
<ul style="list-style-type: none"> <li>• see their own role as that of guide, consultant and resource provider;</li> <li>• understand that we are living in a rapidly changing world and that it is necessary to draw from numerous sources and different perspectives to build knowledge;</li> <li>• realise the importance of helping learners to set their own learning goals;</li> <li>• enable learners to acquire skills to behave as self directed learners;</li> <li>• create realistic problem-based learning opportunities in which learners discover things for themselves and make their own meanings;</li> <li>• provide prompt and informative feedback to learners and offer them guidance on how to improve their performance;</li> <li>• use assessment as an integral part of the learning process;</li> <li>• provide strong leadership;</li> <li>• foster collaborative learning as learners learn best in social interactions.</li> </ul>	<ul style="list-style-type: none"> <li>• know how to make use of a variety of learning resources including computer based resources;</li> <li>• engage with learning outcomes and decide how best to achieve them;</li> <li>• actively develop repertoire of thinking/learning strategies including computer related skills to be able to access electronic media;</li> <li>• scan information to discern what is important and what not;</li> <li>• make optimum use of time;</li> <li>• play an active role in the assessment process and learn new assessment methods such as planning and producing portfolios, taking part in self- and peer assessment;</li> <li>• take initiative and find out things for themselves;</li> <li>• make useful contributions during group learning activities.</li> </ul>
<p><i>Add further ideas</i></p>	

### **Overcoming resistance to learning from resources**

There is currently still quite a high resistance on the part of many students and educators to the notion that learning resources can be used in diverse ways to encourage the development of key competences in a course or programme. Many feel that successful learning can only happen in a formal way in which the lecturer oversees and takes charge of the learning environment. The challenge is to move students away from over dependence on educators and learn to take responsibility for their own learning. Introducing quality learning resources can offer opportunities that encourage students to do this. But this requires that educators are trained to use learning resources and to scaffold the right kind of support that will enable students to make optimum use of such resources.



#### **REFLECT & ACT**

Regular reflection on your experiences can be a valuable way of helping you improve your practice. Record your ideas inside this space.

#### **Using learning resources with my students**

1. What learning resources do you currently use with your students?
  
  
  
  
  
2. How do you use them?
  
  
  
  
  
3. How are the students using the resources?
  
  
  
  
  
4. When you look at the summary of roles of facilitators and learners in an outcomes learning and teaching approach, do you need to make any improvements in your use of learning resources? What improvements do you want to make?


**USEFUL  
INFORMATION**

This table is a summary of how you can help students to learn from resources.

Table 1 – Learning from resources

<b>HANDOUT MATERIALS</b>	
<b>Ways in which they can promote</b>	<b>Assessment considerations</b>
<p><b>Wanting to learn</b>            Saving tedious note taking.            Presenting ‘digests’ of important information.            Including information about learning targets and objectives.</p>	<p><b>Nature of learning outcomes</b>            Established principal areas that students should learn.            Helping students to structure their learning of subject matter.            Defining details of the syllabus and its assessment.</p>
<p><b>Learning by doing</b>            Can include activities and exercises for students to do during lectures and in their own time.            Can refer students to textbooks and other learning materials.            Can suggest that students make summary notes during or after lectures, or after further reading.            Can form a basis for discussing ideas with fellow viewers.            Can be a basis for participating in group debates.            Can be used by students for working out lists of questions of ‘matters arising’ from the handout</p>	<p><b>‘Doing’ that can be measured</b>            Students’ completion of exercises included in the handouts.            Students’ summaries made after studying handouts.            Students’ answers to set questions invoking them doing further reading or research.            Levels of participation at discussions of things covered in the handouts.            The extent to which students apply critical thinking to the material in further tasks and exercises set after they have followed up the handouts.</p>
<p><b>Learning through feedback</b>            Handouts can include self-assessment feedback responses to exercises and questions.            Handouts can include ‘expert witness’            Feedback from tutors on important questions tried by students.</p>	<p><b>Assessment and feedback</b>            Tutors giving feedback about whether students have identified the most important features from the handouts.            Giving live feedback on students’ answers to questions arising from the handouts.</p>

Ways in which they can promote	Assessment considerations
<p><b>Making sense of what has been learned</b>                      Handouts can include reflective reviews of different interpretations and approaches to a topic.                      Handouts help students to work out what are the most important factors on a topic                      Handouts can help students by including annotated bibliographies and reviews.</p>	<p><b>Suggestions about assessment criteria</b>                      Make sure that students know what they are expected to do with the activities and exercises in handouts. Make the criteria explicit so students know what they are expected to get out of the content of the handouts. Where possible, negotiate the criteria with students, so that they feel a sense of ownership of the assessment agenda.</p>
<b>COMPUTER CONFERENCING AND E-MAIL</b>	
Ways in which they can promote	Assessment considerations
<p><b>Wanting to learn</b>                      Can make notes available to students without them having to write them. Students can edit and personalize notes.                      Many (maybe most) students like playing with computers.</p>	<p><b>Nature of Learning outcomes</b>                      Helps develop students' communication skills.                      Helps develop keyboard skills.                      Can be a means of giving direct individual feedback to students on their marked work.</p>
<p><b>Learning by doing</b>                      Can include activities and exercises for students to do with given textual material or other information.                      Can refer students to textbooks and other learning materials.                      Can suggest ways that students are intended to add to the content provided to them.                      Can provide briefings regarding preparations students should do before attending lectures or tutorials.                      Can be used by students for working out lists of questions of 'matters arising' from the material.</p>	<p><b>'Doing' that can be measured</b>                      Students' adaptation of the material provided.                      Students' work on exercises set using the medium.                      Students' answers to set questions involving them doing further reading or research.                      Levels of participation in discussions of things covered by the information supplied.                      The extent to which students apply critical thinking to the material in further tasks and exercises set after they have processed the information given.</p>

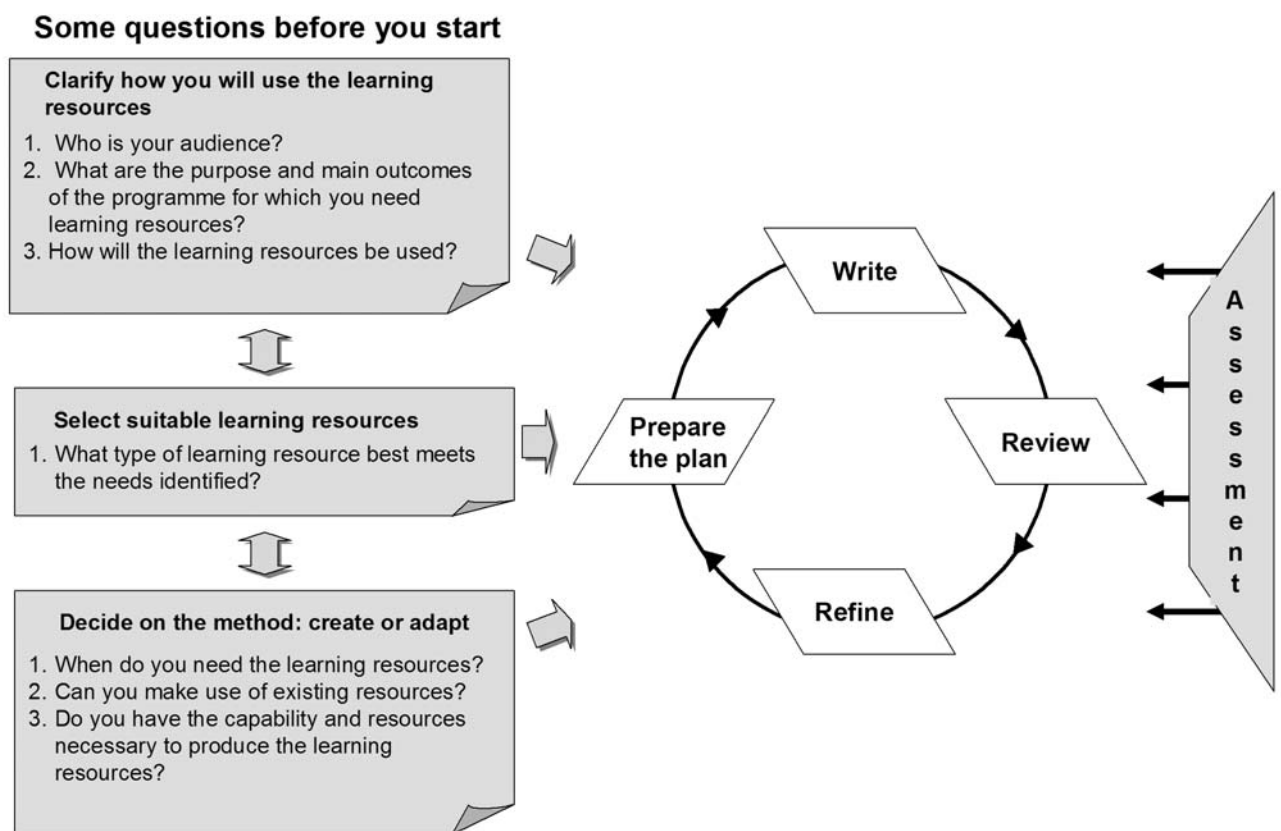
<b>Ways in which they can promote</b>	<b>Assessment considerations</b>
<p><b>Learning through feedback</b> Tutors giving feedback about whether students have identified the most important features from the information supplied. Feedback can include 'expert witness' feedback from tutors on important issues raised by students.</p>	<p><b>Assessment and feedback</b> Students can peer assess each other's contributions to conferences. Giving individual feedback to students on their answers to questions arising from the material.</p>
<p><b>Making sense of what has been learned</b> Conferences can include reflective reviews (from students as well as from tutors) on different interpretations and approaches to a topic. The structure of computer conferences can help students to see the shape of a topic, and its place in the larger picture.</p>	<p><b>Suggestions about assessment criteria</b> Make sure that students know what the participation expectations are for the conference. Make the criteria explicit so students know what they are expected to get out of the material on the system. Where possible, negotiate the criteria with students, so that they feel a sense of ownership of the assessment agenda.</p>

[Brown and Smith (ed) 1996]

## TWO | OVERVIEW OF THE DESIGN PROCESS

Our focus in this manual is on the design process which includes three interrelated phases: pre-start up analysis, planning and development. As the diagram illustrates assessment is a vital component of any materials design process as it informs what competence the learners are expected to show. When you design learning resources to guide the learners on their pathway to increased competence, it is necessary to have a clear idea of the assessment requirements.

### Overview of the design process



This diagram is also a concept map that gives an outline of what you will find in the next six sections of the manual. People are often anxious to plunge into the actual development of the learning resources without doing enough conceptual preparation. The questions in the next three sections will help you to come to grips with some crucial issues.

Although assessment is dealt with separately and follows the section, *Prepare the Plan*, the two sections are clearly linked and should be considered together. While the plan guides the development of the learning resources, it may happen that changes become necessary in the light of the unfolding reality. This highlights the need to see the whole design process as dynamic and iterative.

## THREE | CLARIFY HOW YOU WILL USE THE LEARNING RESOURCES

Before you start on a journey you usually have a good idea of where you want to go, how to get there, and what transport you will use. In short trips you think of these questions automatically and you're not aware of the pre-journey thinking and planning. It is only when you want to visit an unfamiliar place that you realize the importance of doing some preliminary thinking about the journey. Embarking on a materials development journey is similar. Yet frequently people jump the initial planning queue and want to start creating learning materials without adequate preparation.

We can use questions such as these to get an initial idea of the learning resources we need for the learning programme we have in mind. This will help us to make the right decisions.

1. Who is your audience?
2. What is the purpose and main outcomes of the programme for which you need learning resources?
3. How will the learning resources be used?

### 1. Who is the audience?

A detailed description of the learners who will be using the resources you intend to acquire or develop helps to pinpoint early on what would be most suitable. An example of an audience profile shows how information about your learners can inform the selection and development of relevant resources.

Table 2 – Implications of audience profile for learning resources

Audience profile	Example	What it means for learning resources
Age range	Between 15 and 20 years	Must appeal to young people and take into account their interests
Gender	Equal distribution of male and female	Examples reflect the interests of women and men
Geographical distribution	In different areas of Limpopo, thus a combination of urban and rural	Examples, circumstances and style are relevant to both an urban and rural audience. Assumptions can be made that the audience has access to basic infra-structure which includes electricity.
Knowledge of language materials are written in	English is used as a second language	Keep difficult text to a minimum. Will need support to engage with the resources.

Audience profile	Example	What it means for learning resources
		Informative glossaries are a necessary feature.
Education level	Have passed NQF level 2 and are at Level 3.	Draw and build on experience, knowledge and skills acquired previously.
Experience with subject	Has dealt with this subject at level 2.	Expand on the knowledge gained in this subject, deepen understanding and application.
Type of learning resource audience already uses	Read newspapers, magazines, readings for specific tasks. Are only comfortable reading short articles. Are not in the habit of reading.	Include short articles and journalistic style of writing to draw the interest. Support is necessary when introducing difficult text. Encourage reading beyond what is essential.
Psychological factors	Often low self esteem Many lack motivation Find it difficult to take initiatives in organizing self study.	Set manageable tasks to enable learners to achieve success and build their confidence. Assist learners to develop study skills that make it possible for them to become independent.
Social and cultural factors	A mixture of backgrounds, customs and experiences. Stereotyping and bias is practised. Family and friends are usually supportive.	Include examples that reflect the diversity of cultures and experiences. Create opportunities to discuss issues from different perspectives. Include activities in which the support of family and friends is harnessed.



## 2. What is the purpose and main outcomes of the programme for which you need learning resources?

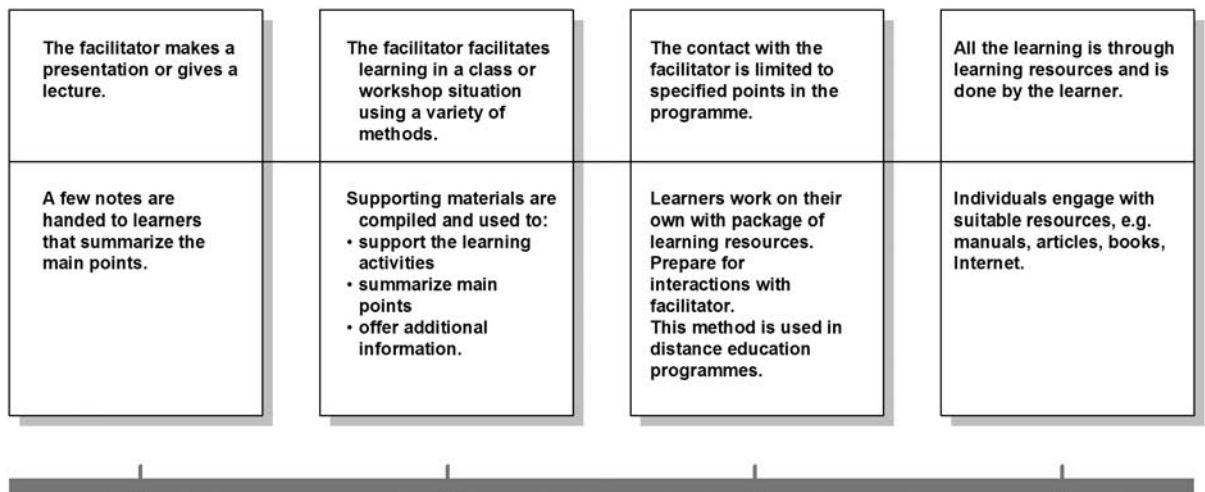
Frequently the purpose and outcomes of a programme are specified in quite obscure educational terms. It is good practice to convert this terminology into an audience friendly description. Why do learners want to do this programme? How would you introduce the programme to them? What will they gain by doing it? What competence does a person have who graduates from the programme? Questions such as these help you to get a clear image of the general thrust of the programme.

## 3. How will the learning resources be used?

Learning resources can be used in a variety of ways to suit the purpose of a programme or learning intervention. Be clear about how the learning resources fit into the overall learning and teaching strategy. What do you expect to do with the learning resources? How will the learners use them? How will you use them? This has an implication for the kind of resource you will acquire or develop. The ways in which learning resources can be used are shown on this continuum.

Table 3

How learning resources are used





**REFLECT & ACT**

Regular reflection on your experiences can be a valuable way of helping you improve your practice. Record your ideas inside this space.

**Clarify how you will use the learning resources**

1. What is the purpose of the learning programme?
  
2. What key competencies (knowledge, skills and values) is the person expected to have who graduates from this programme?
  
3. Brainstorm some learning resources you could use and describe how you would use them.

Possible learning resources	How I intend to use them

## FOUR | SELECT SUITABLE LEARNING RESOURCES

How will you know which type of learning resource is most suitable for your programme? The nature of the programme and the way you intend to use the resource determines to a great extent what is appropriate. For example if you want the students to learn how to use the keyboard it is possible to use an interactive e-learning keyboard skills tutor software programme or a print manual that has a variety of exercises for students to practice their typing. Students would probably be interested in the e-learning keyboard tutor programme and for the purpose of learning keyboard skills this may be a better option than the print manual. But the teacher who teaches this class is used to the print manual which she has been using for many years and is reluctant to change because students have been very successful using it. When making a decision about the type of resource to acquire you will need to consider the purpose and learning outcomes of the programme, how the resource will be used by educators and students, the expertise of educators and the readiness of students, what it costs to acquire and use and the time needed to develop it.

Sometimes people do not know what to choose because they are unaware of the range of resources that exists. The table below provides a good overview of the types of resources that can be created. They can be developed in print or as computer assisted learning resources.

Table 4

### Types of learning resources

Resources that teach course content	Resources that build on other resources	Resources that support specific learning activities	Resources that support learning processes
<ul style="list-style-type: none"> <li>• Open learning materials</li> <li>• Lecture notes</li> <li>• Readers</li> <li>• Reading sets</li> <li>• Resource packs</li> </ul>	<ul style="list-style-type: none"> <li>• Textbook study guides</li> <li>• Reading guides</li> <li>• Course guides</li> </ul>	<ul style="list-style-type: none"> <li>• Manuals</li> <li>• Laboratory guides</li> <li>• Seminar guides</li> <li>• Fieldwork guides</li> <li>• Project guides</li> <li>• Work-placement guides</li> <li>• Staff use of student guides</li> </ul>	<ul style="list-style-type: none"> <li>• Skills guides</li> <li>• Skills profiles</li> <li>• Logs</li> </ul>

*[Summary based on information from Course Design for Resource Based Learning, Wisdom and Gibbs, 1994]*

The descriptions that follow will enable you to make an informed selection.

## Resources that teach course content

### Lecture notes

These may vary from an outline with listed headings, to summaries of main points and full texts. Notes can be prepared when the need arises and can be handed to students before and after the lecture.

### Readers

This is a collection of notes for which copyright has been cleared. Suitable articles from journals, newspaper articles and extracts from chapters of books are compiled in a pack. The pack provides core reading for the course or programme and can be duplicated at relatively low cost. Readers can be arranged in an accessible way by using headings, short introductions, and questions to guide the learner. Often an extended bibliography is included.

### Reading sets

A pack of readings can be collated for a specific topic or subject. Like readers it consists of various articles, extracts and notes. Instead of duplicating it for each individual, one copy of the set is kept in a file in a place where it is easily accessible to learners. Reading sets are an inexpensive way of creating suitable learning resources.

## Resources that build on other resources

### Textbook study guides

It can be a much more cost effective option to design a study guide around a suitable book than to develop materials from scratch. Study guides are well structured and have features such as brief overviews, questions that can be answered by reading specific sections of the book, comments, additional information to help with difficult parts or to fill in some gaps, and self assessment questions or assignments. They are often referred to as wrap around study guides. This can be an appropriate option if a good textbook is available.

### Reading guides

Reading guides help students to find reading resources or suitable alternatives. The guides look like expanded reading lists and they contain useful comments and advice on which parts of the readings to focus on and which parts to skip.

### Course guides

Also known as study guides they provide a comprehensive framework that guides students through the course. Some or all of these features are included:

- aims and statements of learning outcomes
- a summary of the course content
- an indication of how the course links to other courses and programmes

- 
- a description of how the course is structured and sequenced with a timetable of deadlines
  - a list and brief description of all teaching sessions including lectures, seminars, workshops, laboratory time
  - a list of available resources including print, audio, video and computer assisted learning software
  - information about assessment
  - study guidance

## Resources that support specific learning activities

### Manuals

Manuals explain how to do things and they are excellent resources for supporting processes, such as how to manage projects, how to learn word processing skills, learning how to do field work. The advantage of a manual is that students can refer to them when they need to.

### Laboratory guides

Laboratory guides contain all kinds of useful information about the apparatus and equipment, how to use it, advice on carrying out experiments and writing lab reports. They also contain data recording tables and graphs that student can use to record their observations and findings.

### Seminar guides

Seminar guides include any information and guidance that help students prepare for seminars. They may include a reading list, suitable reading materials and handouts.

### Fieldwork guides

A guide can be compiled with supporting information and questions that encourage students to use the time in the field optimally by behaving as active explorers. Photographs and diagrams can be included to draw attention to specific areas being investigated.

### Project guides

A project guide gives advice and support on how to carry out projects and usually includes a schedule of deadlines for each phase of the project. It contains practical information gleaned from previous experiences of students.

### Work-placement guides

This is a particularly helpful guide for students who are in work-placements. It can contain information about the responsibilities of the student, host organization and tutor. Guidelines for keeping a work diary and preparing a final report as well as questions to help the student prepare for structured meetings with tutors can also be included.

### Staff use of student guides

Any guides prepared for students can also be used by staff who are involved in the programme.

## Resources that support learning processes

### Skills guides

These guides can be simple single page worksheets that offer guidance on how to write reports, use the computer lab, work in groups, and compile a portfolio. They are developed in response to particular needs.

### Skills profiles

Clear descriptions of the skills and rating scales that indicate the level of attainment are included. Skills profiles can be used to help students assess their own performance. They have to be linked to assessment in the programme for maximum benefit.

### Logs

Logs are diaries that contain various bits of information deemed important for students who are have to work independently during practical work sessions and work placements. The log may include relevant articles, review questions and a skills profile.



#### REFLECT & ACT

Regular reflection on your experiences can be a valuable way of helping you improve your practice. Record your ideas inside this space.

#### Select suitable learning resources

You can review and refine your initial ideas about the use of learning resources in your programme.

1. Which type of resource will be most suitable for your programme? Why?

2. What are some of the advantages of using this resource?

3. Can you think of any disadvantages?

4. How will you help your students to engage with this resource?

## FIVE | DECIDE ON THE METHOD: ADAPT OR CREATE

There are two main methods of producing learning resources:

- adapt an existing learning resource or set of resources; or
- create it from scratch.

You will have to decide what the best option is.

Use existing learning resources developed elsewhere

Learning resources that have been developed in one institution (originating institution) can easily be used by another (user institution). Reasons for using existing resources include:

- Cost– developing new materials is expensive and requires investment of financial resources that an institution may not have;
- Time– materials development is time consuming and will delay the availability of the materials;
- Quality– the materials may have the quality that the institution cannot necessarily improve on, given the time and available resources;
- Skills– staff may not have the necessary skills and training may not be available;
- Diversity– exposure to different sources and treatments provides learners and staff with new ideas and support.

Different ways can be used to integrate existing materials into programme curricula. A crucial first step is an analysis to determine what level of correlation exists between the learning resources and the programme curriculum for which they are envisaged. This is a useful list of questions that can help to interrogate learning resources in order to determine their suitability.

Table 5

<b>EXISTING LEARNING RESOURCES – HOW SUITABLE ARE THEY?</b>	
<b>Questions</b>	<b>Implications for adaptation</b>
Is the content appropriate?	There must be a good match between the content and what has to be covered in your programme. If too much adaptation is required, it might be cheaper to write your own learning resource.
Is the coverage comprehensive enough?	If there are many gaps you may have to add too much new material.
Is the content accurate and authoritative?	A few minor inaccuracies are not serious and can easily be corrected during the adaptation of the materials. If there are serious flaws in the



Questions	Implications for adaptation
	presentation of concepts, much more work is required to correct it.
How up to date is the material covered?	In some programmes practices change very quickly as new information becomes available. You don't want to invest in a resource that is already outdated or that will be so in the near future.
What prior knowledge is assumed?	If the prior knowledge is more than the learners have, you may need to prepare a pre-course supplement to bring your learners up to the starting level of the programme.
Is the language level appropriate?	The language must suit the discourse of the programme and be accessible to learners. Plain language editing can help to simplify complex language, and support mechanisms can be built in to help learners cope with difficult terms. An editor can be consulted to establish whether the editing required is manageable given the time and cost constraints.
Are the activities of an acceptable standard and suitable?	The activities must be varied and fit for the purpose of the programme and the learners must be able to do them. For example activities that are developed for learners who work in an office might not be suitable for pre-service learners at college. In this case the activities will have to be adapted for a different context and this is time consuming.

Questions	Implications for adaptation
Is the expense warranted?	<p>How much will the adaptation actually cost? Be aware of hidden costs such as copyright expenses, plain language editing, and development of supplementary materials.</p> <p>Can students realistically be expected to acquire their own copies of it? Can bulk discounts or shareware arrangements be made? If the material is computer based, is it suitable for networking, and is this allowed within copyright arrangements?</p> <p>How is the resource material or medium demonstrably better than the cheapest or simplest way of learning the topic?</p>

*[Questions adapted from two sources: COL's Creating Learning Materials for Open and Distance Learning: A Handbook for Authors and Instructional Designers, 2005 and Race, Phil, Helping Students to Learn from Resources, 1996]*

When you have carefully considered these questions and you are convinced that it is feasible to use existing learning resources, you will have to decide how best to adapt them. Here are some options.

### **Use the materials without modification**

This is a very familiar method as prescribed books have been used in courses and programmes for many years. Different approaches are possible depending on the nature of the course outcomes, the particular context in which learning takes place, the available learning resources and the constraints of time, capacity and finances. It may be possible to use the learning resource (be it a book, a set of self instructional learning materials or a reader comprising a set of relevant articles) in its entirety or parts thereof. Here are some examples:

- an existing handbook could be selected as a guide to develop practical skills
- selected readings from a book or set of materials can be identified and incorporated into the programme or course
- a set of articles can be compiled as a reader. Be aware that copyright clearance must be sought.

---

### **Use the materials with minor modification**

It is possible to use existing resources with minor modifications that do not necessarily require a formal agreement with the originating institution or company. In Section 4, *Select Suitable Resources*, you discovered that a practical and cost effective option is to design a study guide around a suitable book. Such guides offer educators the opportunity of contextualizing the learning for a particular course or programme and learner audience. A cost factor that has to be borne in mind is that the book to which the study guide is linked will have to be procured by the students. This may, however, work out much cheaper than producing the learning resources from scratch. Another example that can be quite effective is to develop a workbook comprising a range of activities that encourage students to practise key skills and develop a thorough understanding of key concepts.

### **Agreement to adapt the materials**

Learning resources produced elsewhere can successfully be adapted to meet the needs of other learning contexts. Usually a formal agreement is entered into which sets out the parameters for the adaptation. It is recommended that adaptation should only be embarked on where there is a fairly high correlation between the existing learning resources and the key outcomes and strategies of a particular course. Adaptation up to 30% is generally considered viable.

A variety of methods can be explored ranging from the simple to the complex. For example:

- A reader of articles that reflect contextual realities can be compiled and added as an additional resource. Linkages to the reader could be created at opportune points in the existing learning resources.
- Case studies, examples and illustrations can be included to highlight contextual challenges, to show how concepts can be transferred to situations familiar to the students and to provide a 'local feel'. Case studies can either be integrated into the learning resources or they can be collated as a separate resource to which reference is made.
- A range of relevant activities can be incorporated that are tailored to the outcomes of the course.
- A language edit can be carried out to make the materials more accessible for students whose home language is not English. A glossary of difficult terms and concepts can be added.

Adapting and modifying learning resources is essentially a curriculum development activity and it follows that an in depth analysis will have to be done to establish: how the resources will be used; how the resources link up with other learning and teaching strategies; how the resources will affect the assessment methods; what support learners and educators will need; what evaluation methods will be used as part of the adaptation process and afterwards when the resources are delivered in the colleges. The answers to these and other relevant questions can provide guidance not only during the adaptation process but also when the learning resources are delivered. Developing an overarching

curriculum framework in which relevant information is documented is a quality assurance mechanism that lays the foundation for a well designed adaptation.

The framework can provide details about the following aspects:

- Aim and outcomes of the programme
- Target learners and their context
- Approach to learning and teaching
- Assessment strategy
- Learner support strategy
- Roles of programme participants
- Evaluation strategy

When the key curriculum questions have been explored a decision must be made as to the most appropriate approach for the adaptation. **Tool 1** in the **Toolkit** gives an example of a strategy used to adapt for South African learners in FET colleges in Limpopo a set of learning resources that were originally developed for a British audience.

### Create learning resources

Developing learning resources from scratch is a time consuming activity that demands writing expertise, dedicated writing time and adequate financial resources, all of which are often in short supply. The decision to originate learning resources should only be taken where existing materials are deemed inappropriate or in the event that learning resources do not exist for a specific course. Practice shows that institutions are using a range of innovative methods such as bringing in expertise, outsourcing and working in partnership with other organizations in order to optimise their limited available resources.

**Tool 2** in the **Toolkit** gives an overview of the main steps in the course design process.



#### REFLECT & ACT

Regular reflection on your experiences can be a valuable way of helping you improve your practice. Record your ideas inside this space.

#### Adapt or create?

1. Prepare a short PowerPoint presentation for your colleagues to share with them the reasons for your decision to adapt or create a learning resource for your programme. (You can opt to do a presentation on flipchart)

Here are some points you might include in the presentation.

- What learning resources you need for your programme.
- Describe the approach you have chosen for acquiring the learning resources.
- Why did you choose this option?
- What are the next steps?

In a presentation you only write the key points. Use headings to show the sequence of your ideas.

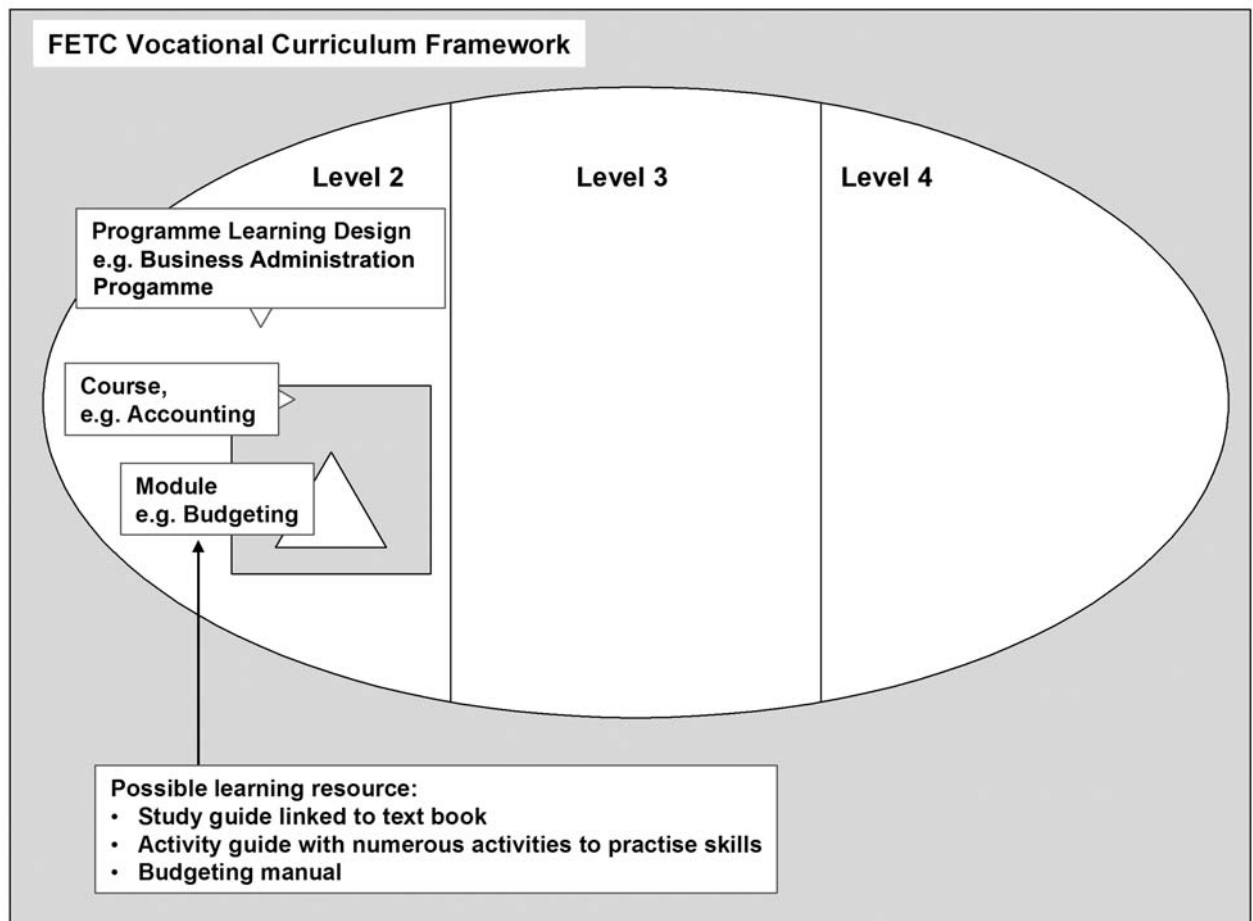
**Write ideas for your presentation here**

## SIX | PREPARE THE PLAN

When preparing any learning resource, look at the big picture as no resource is used in isolation of the programme. The <sup>1</sup> **curriculum** gives a clear indication of the overall purpose and outcomes of the programme, the learning and teaching approaches adopted and assessment methods used. This provides direction for the development of the learning resources.

An example from the Business Administration Programme, Level 2, illustrates the components of the learning programme and shows clearly how they are interrelated.

### Seeing the big picture



### Holistic planning

Here is an approach to planning that enables you to locate the design of the learning resource within the context of the overall programme.



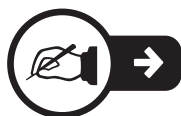
### 1. Prepare a programme outline

The learning design for selected programmes is prepared by the National Department of Education. This is the blueprint that informs how the programme should be implemented in the colleges. Where no learning design exists for a specific programme that a college intends to offer, the college is responsible for drawing up the learning design. You can use the learning design to capture the most salient information about the programme in a programme outline. You can find an example of such a document in the **Toolkit (Tool 4)**.



### 2. Compile a summary of learning outcomes

Whether you are planning a learning resource for use in the vocational programmes or for unit-standard based programmes in response to specific needs, e.g. a short skills programme on catering, it is useful to get an overview of the learning outcomes. **Tool 5** is an overview of learning outcomes for the Office Administration Programme (Levels 2, 3 and 4). When we developed an activity guide for the core courses for level 2, we wanted to see the progression of skills across levels. This information helps to create a coherent learning pathway.



### 3. Draw up a plan for the learning resource

Draw up a plan for the learning resource you decided is most appropriate. You may still revise your ideas about the format of the resource at this stage. When we started planning the learning resource for the Office Administration Programme we initially thought the adaptation of an existing resource would be best. However, we discovered later that an activity guide would provide the measure of flexibility that was needed.

When planning you have to sort out:

- How to structure the resource and determine what components to include, e.g. introductory notes to facilitators and learners, overview of main sections, activities and answer grids, summaries, feedback section, reading list, bibliography, glossary;
- How to sequence the content;
- What style of writing to use: informal and chatty, or formal yet accessible;
- The general layout and what graphics to include;
- How the resource will be packaged.

**Tool 6** is an example of the structure and sequence of content we used for an activity guide for the Business Administration Programme (Level 2).



## REFLECT & ACT

Regular reflection on your experiences can be a valuable way of helping you improve your practice. Record your reflections on the planning activity inside this space.

1. Draw up a plan for your learning resource using **Tool 7**. This tool gives an outline of what to include in your plan.
2. Share your draft outline with one or more of your colleagues and ask for their feedback.
3. Refine your plan.

### Reflection

4. What new insights have you gained by doing this planning activity?





## How to sequence content

Here are some ideas about approaches and methods for sequencing content.

There are main approaches to sequencing content:

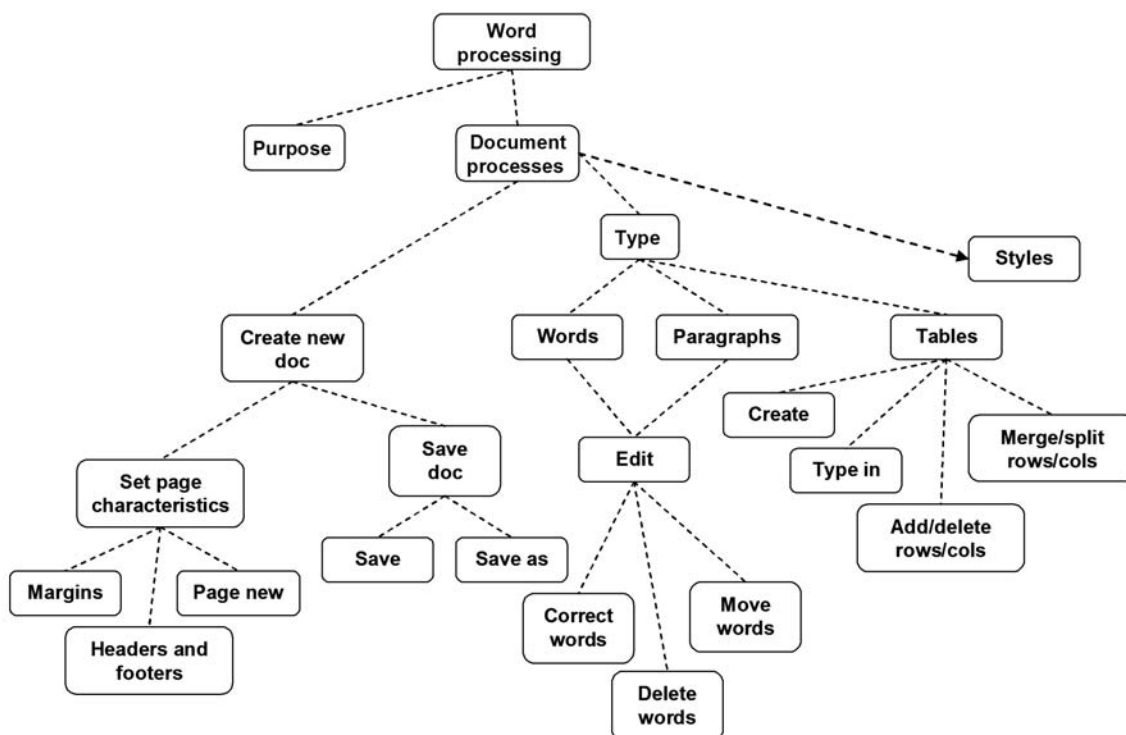
- Topic oriented
- Concept oriented
- Task- or objective oriented.

### Topic oriented

In the topic oriented approach to content, you start from the topic. (This approach is essentially the traditional syllabus approach). You break down the topic into its components (if a hierarchical subject) or its associated sub-topics (if not hierarchical).

Here is an example.

#### Sample of a topic approach to content

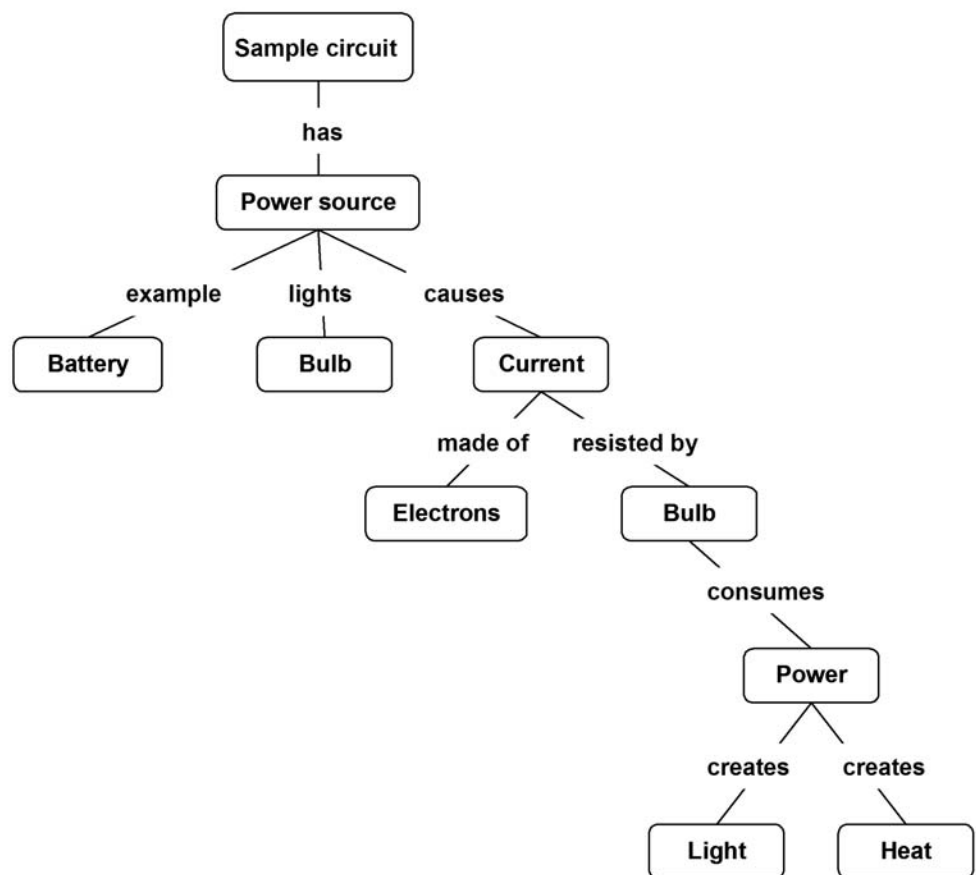


### Concept oriented

This approach is similar to the topic-oriented one, but focuses on concepts rather than topics. It is an approach that can work well in concept-rich subjects (such as the sciences), but is difficult to apply to subjects where the content is more open (e.g. literature).

...Such maps are an excellent way of establishing an intellectually coherent structure to what is to be learnt. This examples gives you a good idea of how to use the concept oriented approach.

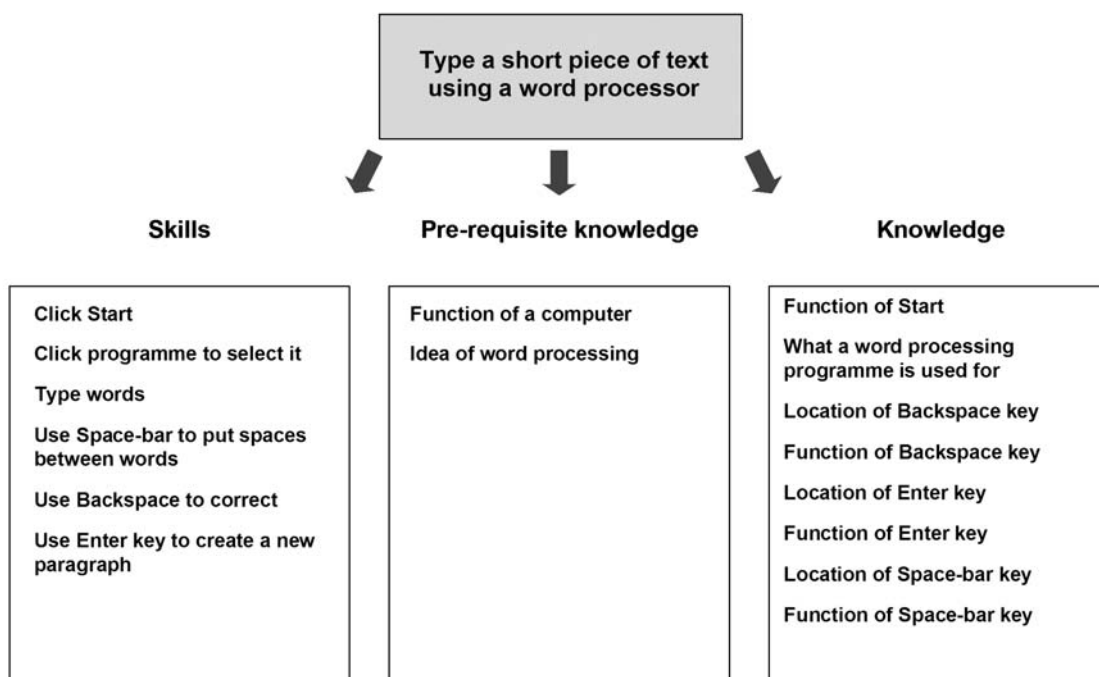
### Sample of a concept approach to content



### Task- or objective oriented

In this approach, you start from the overall achievement that you wish your students to have and then break it down into learning objectives as illustrated in this example.

#### Sample of an objective-orientated approach to content



This method avoids the problem of where to stop, since you only include items that are essential for the student to achieve the overall objective. Of course, you still have to decide whether items that you have identified are to be taught in the course (the outer two columns) or be assumed as pre-requisites, but that is a smaller problem than the one presented by the topic approach.

Here are other ways in which you can sequence the units of a course (after Rowntree, 1990, and Romiszowski, 1986):

- **by topic** – This method can be used when the topics can be studied in any order
- **chronologically** – An approach that might well apply to a history course but could even be used for a maths course when looking at how a topic has developed over time.
- **by place** – For example, you might work outwards from the home to the world or work from the micro scale (inside a cell) to the macro (the whole organism).
- **by cause and effect** – Here you might start with a phenomenon and explore its causes and origins.
- **by structural logic** – In this case you follow the logic of the subject. Maths is often taught like this.

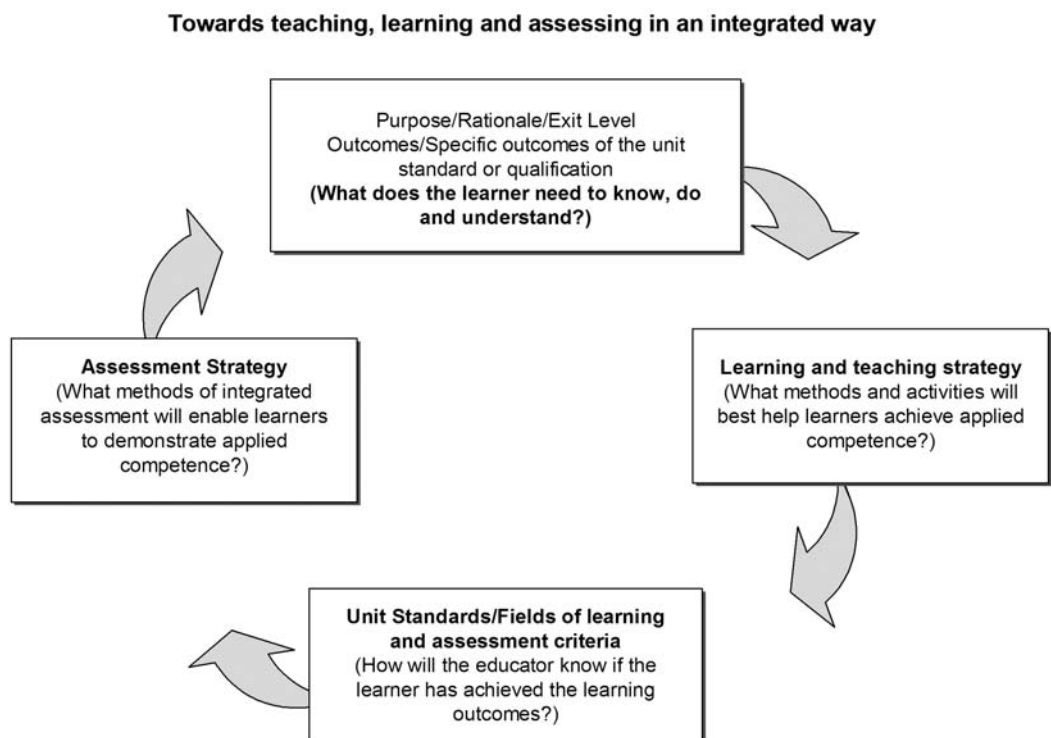
- **problem-centred** – In this case you identify a problem and explore its solution (e.g. how do animals survive severe weather?).
- **spiral** – In the spiral approach, the same material is revisited several times at increasing depths.
- **backward chaining** – Here you start with the end result and gradually work backwards through the course to explore how that end result is achieved. For example, in building a spreadsheet, you could start with a finished spreadsheet and set some exercises on using and critiquing it. Through doing this, learners start with an overall understanding of a spreadsheet and then gradually develop a deeper understanding of how it is constructed.
- **a loose network** – In this case the material consists of a loose collection of topics that can be studied in any order. This is a typical approach in discovery learning and topic-learning. It is also an approach that is suited to hypermedia, whilst being difficult to implement in print.
- **a PERT network** – PERT networks are usually found in project management but they can be used to sequence the topics in a course. The idea of dependency is central to PERT networks. In project management, 'dependency' means that one task cannot be started until another has been completed. In course planning, 'dependency' means that one topic cannot be studied before another has been mastered. Using PERT networks is only practicable if you have access to some suitable project management software.

*[Extracts from Section 3.4 Content Analysis and Planning: What to include? COL's Handbook, 2005]*

## SEVEN | MAKE DECISIONS ABOUT THE ASSESSMENT

Outcomes based education foregrounds assessment as an integral part of the learning and teaching process. It involves *collecting and interpreting evidence in order to determine the learner's progress in learning and to make a judgment about a learner's performance* (DoE 2003:21).

The assessment requirements are a good starting point when you design learning resources. They will enable you to design suitable assessment activities and tasks that show whether the learner has achieved the expected level of competence. The interconnected nature of learning and teaching and assessment is well illustrated in this diagram.

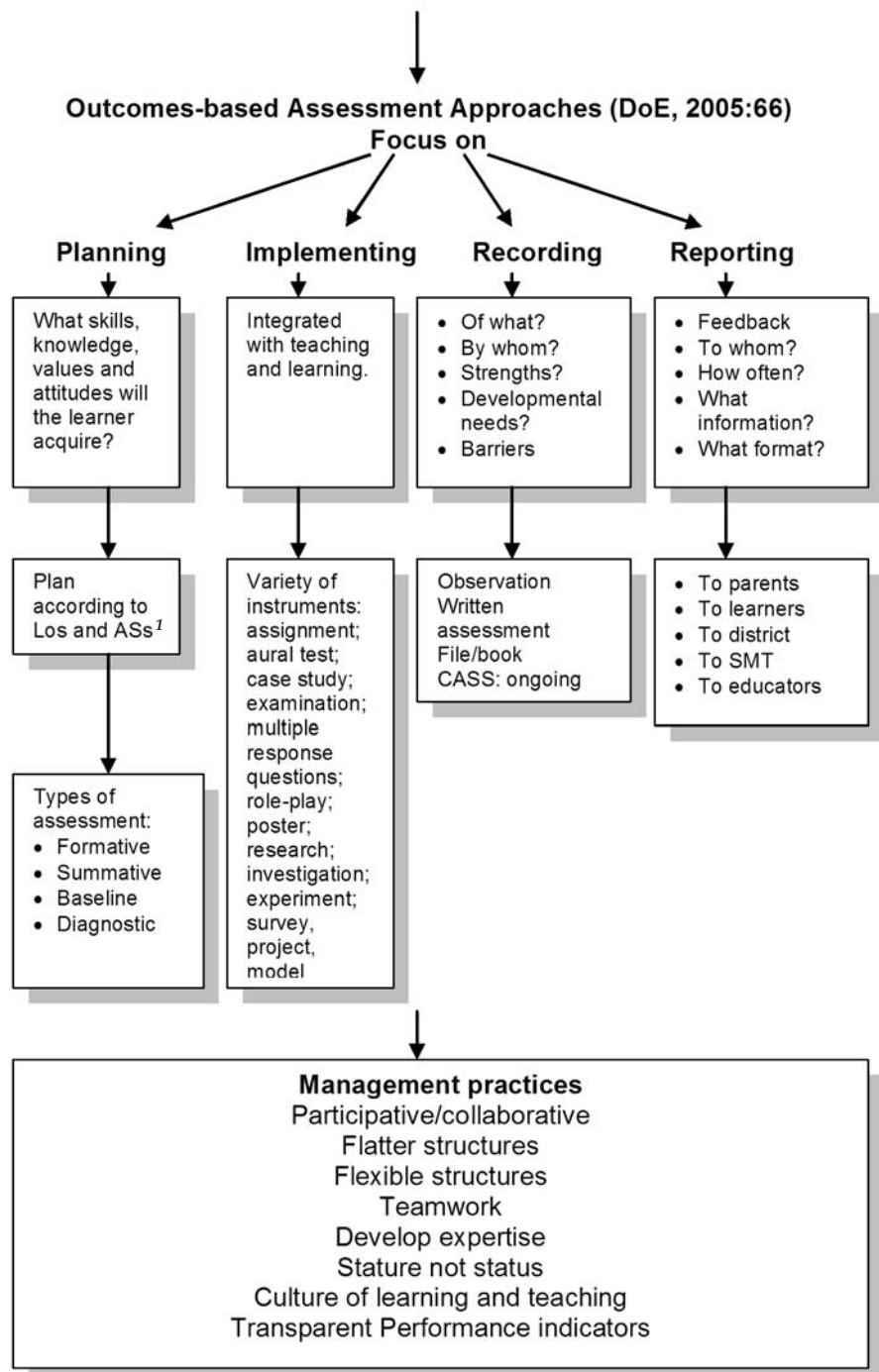


SAQA Guidelines for an Integrated Assessment

This approach to assessment is characterized by the following:

- Learners are active
- Learners are assessed on an ongoing basis
- An integration of knowledge; learning is relevant and connected to real-life situations
- Learner-centred; educator is facilitator; educator constantly uses group work and teamwork to consolidate the new learning
- Learners take responsibility for their learning; learners are motivated by constant feedback and affirmation of their worth
- Emphasis on outcomes – what the learner becomes and understands
- Flexible time-frames allow learners to work at their own pace
- Comment and input from the wider community is encouraged.

This diagram shows all the elements that have to be considered when planning and implementing outcomes based assessment approaches.



---

## Some key terms

### Baseline assessment

Baseline assessment should take place at the start of any learning cycle. It is used to establish what learners **already know and can do**. It helps in the planning of the learning programme and activities and ensures that the learning experience moves from the known to the unknown. The recording of baseline assessment is usually informal. The baseline assessment task often takes the form of a few preliminary warm-up questions but educators need to be encouraged to use a much wider range of strategies.

### Formative summative

Any form of assessment that is used to give **feedback to the learner** is fulfilling a formative purpose. Formative assessment is a critical element of learning and teaching. Constructive feedback is needed by learners in order to help them to improve.

### Summative assessment

When assessment is used to record a judgement of the competence or performance of a learner, it serves a summative purpose. Summative assessment requires careful planning and a wide range of instruments and strategies should be used so that learners can provide a range of evidence for their level of competence.

### Diagnostic assessment

Diagnostic assessment is used to help us to identify barriers to learning and guides us towards selecting alternative or additional support strategies. It may even tell us that we need to redefine our learning goals.

### Continuous assessment

Continuous assessment involves the use of the above four types of assessment in an ongoing way during the learning and teaching process. Our ongoing assessment of our learners' achievement is not necessarily always formal or recorded but we should be aware of when our learners are failing to achieve the intended learning outcomes and be able to adjust the learning experience accordingly. Continuous assessment processes recognise that no single assessment task can be entirely valid or reliable by itself. Instead, our teaching and learning decisions should be based on a variety of different assessment tasks and activities that happen at different times during the learning process.

### Integrated assessment

In integrated assessment we talk about the integration of skills, knowledge and attitudes required for the demonstration of applied competence in a particular area. This integration may take place at the smallest unit of learning, i.e. one unit standard, or across a number of units of learning or coherent chunks of learning. Assessment should be of the whole and not fragmented.

## Planning and implementing an integrated assessment approach

You can begin by asking these questions:

- Why are you assessing? (What is the rationale?)
- What are you assessing? (What do you want to find out?)
- What evidence is needed to provide proof of applied competence? (What will tell the assessor that the learner understands, knows and can do?)
- How do you assess appropriately in line with the purpose of assessment? (What instruments and approaches will allow learners to demonstrate applied competence?)
- How will you gather the evidence?
- How will you record the evidence?
- How will you report on the assessment?

All these questions are answered and recorded as part of an assessment strategy document that provides clear guidelines to educators, assessors and students about: the overall approach, the assessment methods to be used, the assessment rating, the assessment procedures, who will be involved in the assessment, what records will be kept and what feedback will be given and to whom. (**Tool 8** gives some ideas for designing an assessment strategy).

The steps inside the block are SAQA guidelines for designing appropriate assessment strategies and methods.

### **Suggested approach for developing assessment strategies and methods**

1. Study the level descriptors for a particular NQF level
2. Study the purpose of the qualification
3. Analyse the exit level outcomes, the critical and developmental outcomes and the main learning areas that deal with each dimension of the purpose of the qualification
4. Identify discrete areas that need to be assessed separately
5. Identify ways to facilitate integrated teaching and learning in areas where applied competence will be assessed
6. Sequence the assessment in accordance with the assessment plan
7. Design the assessment instruments
8. Review the process, instruments and application.

(SAQA)



---

## Some assessment methods

Here is a list of assessment methods you can choose from.

### Observation

Observation refers to an assessor observing a learner carrying out a particular activity as a normal part of his/her workplace responsibilities. It is well suited to evaluating process as well as practical skills.

### Simulations

Its purpose is to reproduce the essential characteristics of real working experience in which the learner is expected to be competent. The learning/assessment environment must be created with careful attention to the design and planning of situational variations, which the learner is expected to handle. They are particularly appropriate when the real life situation is hazardous.

### Computer simulations

Mirrors actual activities and conditions on a computer screen, especially for complex technical skills, or for actual conditions that are too dangerous or too costly for alternative methods.

### Role playing

To enable the learner to demonstrate his/her competence in the areas of interpersonal and communication skills. It is loosely structured and learners are given specific roles to enact. Learners should be provided with feedback.

### Demonstrating and questioning

Demonstrating refers to an assessor observing a structured practical activity that would not form a normal part of the learner's workplace activities at the time of the assessment. The assessor must question the learner on what is taking place to elicit knowledge and understanding. It is suited for evaluating process and practical skills.

### Pen and paper tests

They are often used to measure the extent of a learner's factual knowledge. They consist of a series of questions related to the assessment criteria. For more complex outcomes, the learner may be required to demonstrate his/her analytical thinking skills in essay form.

### Case studies

Useful for evaluating a learner's ability to understand a given scenario by getting the learner to respond to a series of relevant questions.

### Oral tests

Can be used in conjunction with practical demonstrations or to test speed and accuracy of recall when these are essential to development of particular elements of competency.

It can also be used to measure the understanding of factual knowledge, or when the learner currently lacks the requisite literacy level and where literacy is not a requirement for competence. Care must be taken with the language used in questioning.

### Projects

Used on a largely unsupervised basis and can be carried out in the workplace or in a learning environment, or even in a group. The assessor makes a judgement on the basis of the project evidence. It is suitable for long-term activities of a more complex nature.

### Portfolios

They are collections of evidence relating to the work being assessed. A portfolio can include a variety of samples of the learner's work. It is useful for more complex and long-term activities.

### Computer-based assessment

It involves the learner interacting with a specific computer programme designed to assess the learner's knowledge and skill in a particular context. It could involve questions and answers, creative design or require more input from the assessor who seeks further responses or clarification.

### Self assessment

It is designed to encourage learners to be reflective of their own learning. It is often in the form of a checklist, questionnaire completed by a learner, notes jotted down or other forms of structured self-assessment undertaken after an action, demonstration, oral examination, etc. The learner critically evaluates his/her progress.

The learner should ensure that he/she is confident of his/her own competence prior to presenting himself/herself for final assessment by the assessor.

## Selecting suitable assessment methods

This table gives you some idea of the methods that can be selected to demonstrate competence in different types of outcomes.

Table 6

Type of outcome	Suitable methods of assessment	Examples of outcomes	Examples of assessment methods
Psychomotor outcomes	On-the-job observation, simulations	The learners should be able to paint a wall.	<ul style="list-style-type: none"> <li>• Observe the learner painting a wall in the workplace.</li> <li>• Observe the learner painting mounted cardboard in the classroom (simulation).</li> </ul>

Type of outcome	Suitable methods of assessment	Examples of outcomes	Examples of assessment methods
<b>Affective outcomes</b>	Any method can be adapted to assess these outcomes.	The medical students should demonstrate concern and empathy for their patients as individuals.	<ul style="list-style-type: none"> <li>• Workplace observation</li> <li>• Simulations (role-plays)</li> <li>• Selected-response questionnaires</li> <li>• Constructed-response answers</li> <li>• Diaries</li> </ul>
<b>Cognitive outcomes</b> <b>Knowledge and comprehension</b>	All the assessment methods involve the testing of knowledge (recall) and comprehension, but to test these outcomes specifically, <b>selected-response items</b> are probably the most suitable, as well as <b>short constructed answers</b> .	The learners should be able to list the main classes of vertebrate animals.	'In the list of animal classes below, make a cross next to those that are classes of vertebrate animals.'
		The learners should be able to calculate power used, using the formula $\text{watt} = \text{newtons} \times \text{metres over seconds}$ .	'List the main classes of vertebrate animals.' 'If a machine can lift 200 newtons over a distance of 1 metre in 20 seconds, what is the machine's power? a. 3 000 watt b. 2000 watt etc.' or 'Calculate the power of a machine if ...'
<b>Application</b>	On-the-job observation, simulations (e.g. case studies), products, portfolios, projects, constructed answers	The learners should be able to design household cleaning devices.	<ul style="list-style-type: none"> <li>• Portfolio of products</li> <li>• Project involving design of one complicated product</li> </ul>
		The learners should be able to apply negotiation skills to resolve conflicts amicably.	<ul style="list-style-type: none"> <li>• On-the-job observation by supervisor</li> <li>• Role-plays</li> <li>• Case studies</li> </ul>
<b>Analysis, synthesis and evaluation</b>	Any assessment method, but particularly 'performance' methods and constructed answers	The learners should be able to devise a management strategy for an organisation./ The learners should draw	<ul style="list-style-type: none"> <li>• Workplace project involving actual performance of activity, possibly jointly assessed by instructor and workplace supervisor.</li> </ul>

Type of outcome	Suitable methods of assessment	Examples of outcomes	Examples of assessment methods
		<p>up a conservation plan for their conservation area.</p> <p>The learners should reflect on their own progress and find ways of developing their skills.</p>	<ul style="list-style-type: none"> <li>• Case studies</li> <li>Diaries and self-assessment schedules</li> </ul>

The assessment methods you select and implement have to be based on sound principles of assessment and conform to accepted criteria.

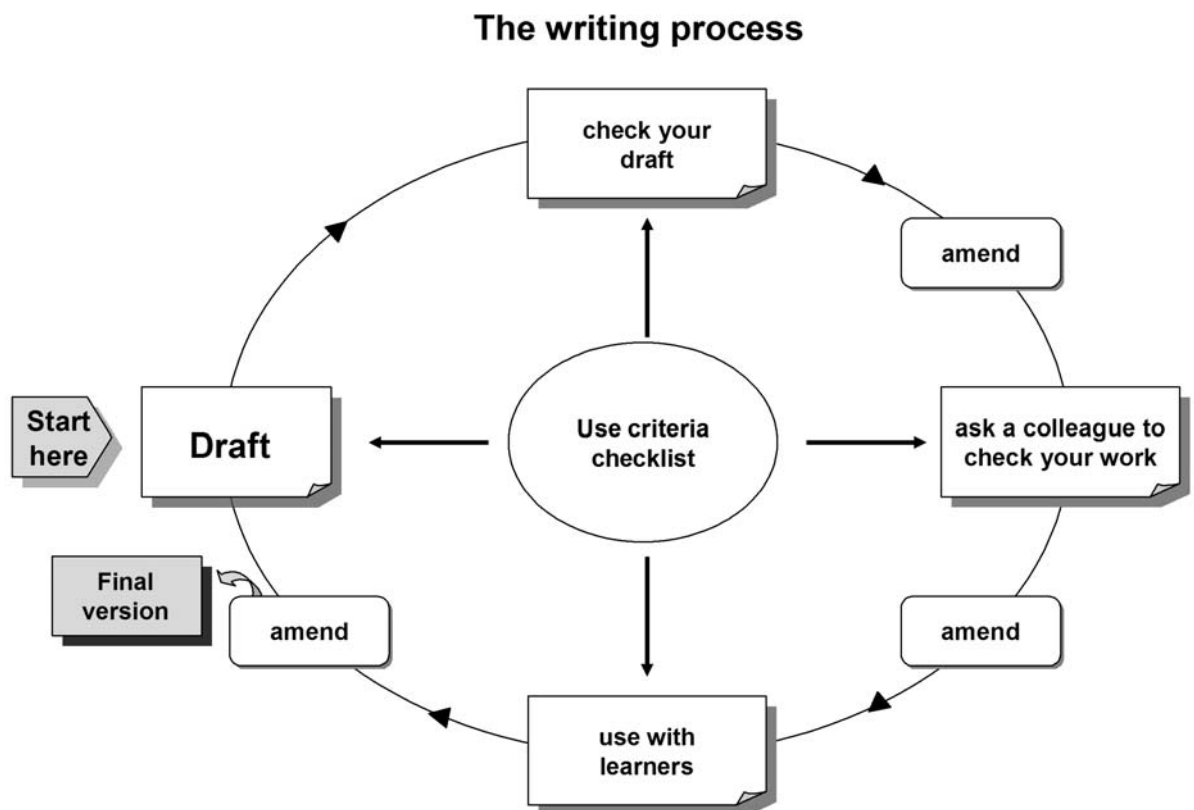
## Assessment criteria for quality assessment

1. Develop **applied competence**, i.e. assessment should measure the significant learning (integrated theory and practice) that learners should be able to demonstrate.
2. Meets **external verification requirements**. It must meet specific outcomes unit standards and critical cross field outcomes.
3. Is **transparent**. Learners must know and understand: What? How? Why?
4. Is **measurable**. The methods and rating procedures must measure the level of performance achieved.
5. Must be **reliable**. The assessment procedures should allow standards of achievement to be interpreted consistently from learner to learner and over time (even when the judgements are made by different assessors).
6. Is **continuous** (CASS).
7. **Clarity**. Detailed descriptions of the quality of learning that is to be demonstrated should be made clear and shared between educators/assessors and learners. This will include descriptions of the content, context and competence that have to be considered when demonstration of an outcome is being judged.
8. Is **authentic**. Assessment should require demonstration of learning in congruent real-life contexts. Must also assess the student's own work.
9. Is **valid**, i.e. is appropriate to level, outcomes and purpose. The assessment methods should actually assess what they are designed to assess.
10. **Fairness**. The assessment should not disadvantage any particular learners. For example, they should not be influenced by any irrelevant factors such as the learner's cultural background.
11. Must be **practical**. Assessment processes should be cost-effective, administratively efficient and allow for maximum ease of scoring (taking into account issues such as overcrowded classrooms in some contexts, for example).



## EIGHT | WRITE, REVIEW, REFINE

You have prepared the plan and can now start the writing process. As with any plan the reality usually turns out to be different and changes will be required. If the preparation has been done carefully the changes should be minor. In one of our workshops, the participants were initially surprised to hear that several drafts would be needed before the final version.



If you want to end with a quality product you have to review, review and review. After writing the first draft, the author can behave as critical reader and make suggestions for improving the draft. Colleagues are very helpful sources of feedback. They understand the context and the needs of learners and their views are invaluable. Of course the learners are VIP's on the review list as they are the intended audience. You can organize field testing of selected sections to check whether the learning resource is hitting the mark. More about field testing later on in this section.

### Helping you get started

One of the most difficult things is getting started. The ideas are all mixed up in your head, the computer screen is blank, and you know you should be doing something but you feel frozen. Every writer, even experienced ones, has to battle with this type of

---

feeling. Here are some helpful ideas to stimulate creativity that emerged during the workshops:

- Engage with examples of learning resources that are linked to the subject for which you are designing your materials. Make a note of interesting ideas and examples. A word of caution. There is no copyright on ideas but copying large chunks of text and images is an infringement of copyright. Always acknowledge your source when you import short extracts, tables and diagrams. When you need to include a whole article or chapter from a book for a reader, you have to get permission and copyright clearance.
- Use a criteria checklist to review selected learning resources. In this way you get a good idea of what good learning resources look like
- Work with one or two colleagues and brainstorm ideas about examples and activities for each topic. It can be useful to create a picture or diagram to unblock the mind. You can spend some time refining your ideas and come up with several diagrams. Developing learning resources is basically a problem solving exercise and this type of activity helps you sort out things in your mind.
- Set manageable writing/development targets in order to focus your attention and energy.
- Monitor the process continuously and make adjustments where necessary.

When you embark on any process your need is to get an overall picture of what is involved and enough information to achieve the identified outcomes. Here are some questions that you will need to find answers to at this stage:

- How do I write learning outcomes?
- How do I write varied learning activities that are of acceptable standard?
- How do I write clearly so that the learners are able to understand the text?
- How can I organize the resource to enable the learners to find their way through it easily?

## Writing learning outcomes

In vocational programmes and unit-standard based skills programmes, the purpose and specific learning outcomes are provided. The challenge is to communicate them to the learners in a way that enables them to understand what is expected of them.

This is an example of a list we compiled to reflect the specific outcomes for managing time in the Office Administration programme (level 2).

Table 7

<b>MY LEARNING JOURNEY</b>		
<b>What I am expected to know and do</b>	<b>I am confident</b>	<b>I still need more practice</b>
1. I can draw up a task list and use it to manage my use of time at college and in a workplace.		
2. I know how to prioritise tasks to complete work tasks on time.		
3. I can give examples of how time is wasted in the workplace and suggest how to prevent it.		
4. I am able to monitor my task schedule and make the necessary changes when this is needed.		
5. I can explain why it is important to keep an up to date diary in the workplace.		
6. I am able to record and update diary information.		
7. I know how to communicate information from the diary to relevant people in the workplace.		
8. I can explain why it is important to manage the use of time in the workplace and how this can be done.		
<i>Add anything else you think you have learned that is not included in the list.</i>		



Here is a list of words you can use to describe outcomes for learning activities. Add to this list any words that you come across.

#### **Verbs to use for describing learning outcomes**

Break down, calculate, categorize, change, combine, compare, compile, compose, compute, contrast, convert, create, criticize, define, demonstrate, describe, design, devise, differentiate, discover, discriminate, discuss, distinguish, estimate, explain, give example, identify, illustrate, draw conclusion, interpret, judge, justify, label, list, match, measure, modify, name, operate, organize, outline, paraphrase, point out, précis, predict, prepare, produce, re-write, recall, select, separate, show, solve, state, sub-divide, summarize, transform, translate, use.....

#### **Writing learning activities**

Four factors seem to be needed for successful learning.

- *wanting* to learn (motivation)
- *learning by doing* (experiential learning, practice)
- *feedback* (finding out how the learning's going)
- *digesting* (making sense of what has been learned understanding).

(Race, P.1996)

Activities are essential features of any learning resource: one can say they form the spine of the learning. The ability to write relevant, imaginative activities that engage the learners and motivate them to take an active part in their own learning is a core skill for any facilitator of learning.

#### **What kinds of activities are required?**

The purpose and nature of a programme determines the level and spread of activities. In a low level, practically oriented course, a good balance of outcomes using Blooms taxonomy would be:

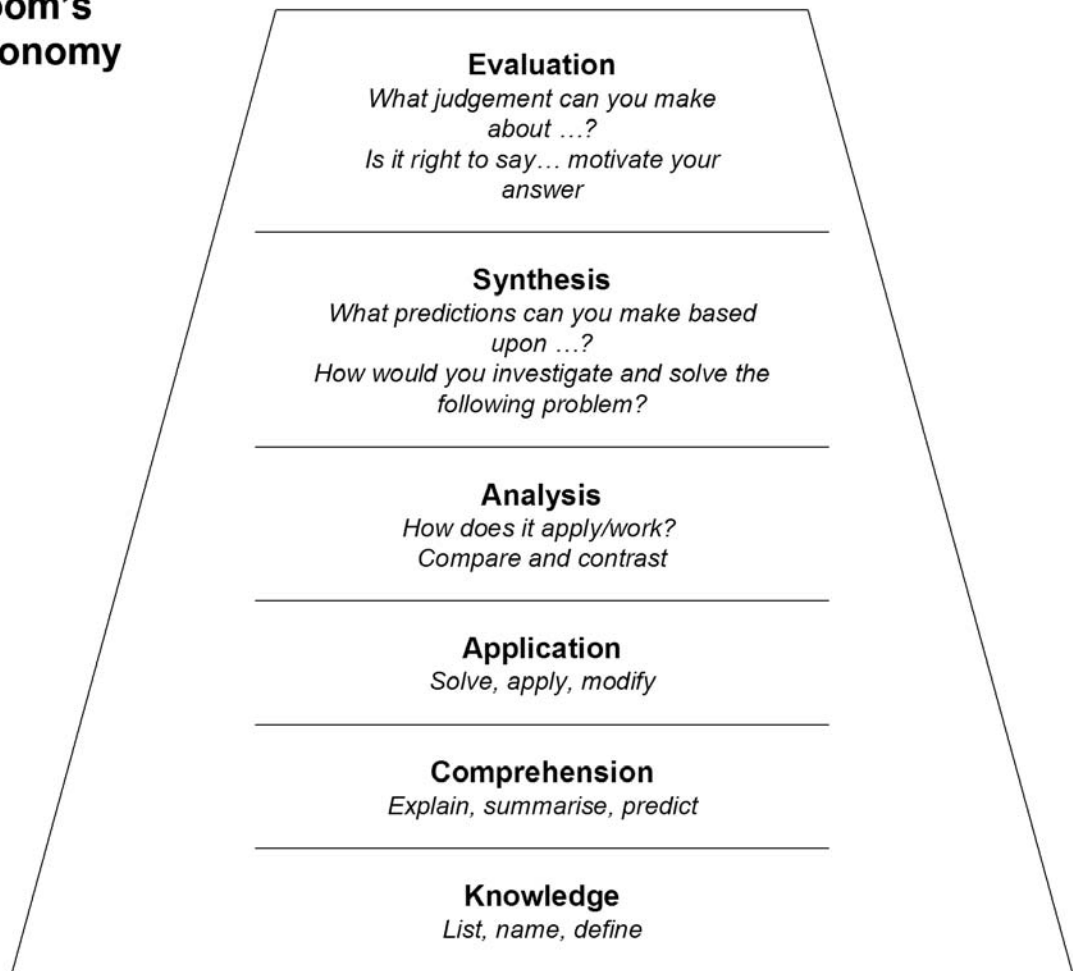
- 20% at the knowledge level
- 30% at a comprehension level
- 50% at the application level

[Freeman, R. 2004]

By analyzing the learning outcomes you can determine the right mix of activities for your learning programme.

Blooms taxonomy or classification is well known and can help you determine the learning levels for which activities can be selected.

## Bloom's taxonomy



From: Bloom, B.S. (ed., et.al.) (1956) *Taxonomy of Education Objectives: Handbook 1, Cognitive Domain*. New York: David McKay Co. Inc

### Blooms levels explained

Level	Stage	Explanation
1.	Knowledge	At this first level, the learner has to demonstrate that s/he has mastered the requisite level of knowledge in a particular field. Deep understanding is not the focus of the assessment but rather the ability to provide data and information.
2.	Comprehension	At comprehension level, the learner demonstrates that he/she understood the material. The learner can therefore translate, interpret and extrapolate information.
3.	Application	The third level is application. It is closely related to comprehension, but goes one step further. It is the behaviour associated with using what has been learned. For example, the learner will choose a formula to solve a problem.
4.	Analysis	Analysis requires the learner to reduce the problem into its component parts and to understand how they fit together to develop divergent conclusions by identifying motives or causes, making inferences, and/or finding evidence to support generalisations. For example, analysis of elements, relationships, etc.
5.	Synthesis	Synthesis on the other hand means that the learner can take component parts and combine them to form a whole, which is entirely new or was clearly not there before. This is usually a problem-solving situation and requires an element of creativity whereby the learner is expected to create a unique plan.
6.	Evaluation	Evaluation is the highest level of Bloom's Taxonomy (classification). This requires that the learner make judgements and evaluate ideas, information etc. such as, judgements based on internal evidence and external criteria. Or, judging the value of material based on personal values/opinions, resulting in an end product, with a given purpose, without real right or wrong answers.

### List of verbs

Stage	Word
Knowledge	Defines, describes, enumerates, identifies, labels, lists, matches, names, reads, records, reproduces, selects, states, views
Comprehension	Classifies, cites, converts, describes, discusses, estimates, explains, generalises, gives examples, makes sense out of, paraphrases, restates in own words, summarises, traces, understands
Application	Acts, administers, articulates, assesses, charts, collects, computes, constructs, contributes, controls, determines, develops, discovers, establishes, extends, implements, includes, informs, instructs, operationalizes, participates, predicts, prepares, preserves, produces, projects, provides, relates, reports, shows, solves, teaches, transfers, uses, utilises
Analysis	Breaks down, correlates, diagrams, differentiates, discriminates, distinguishes, focuses, illustrate, infers, limits, outlines, points out, prioritises, recognises, separates, subdivides
Synthesis	Adapts, anticipates, categorises, collaborates, combines, communicates, compares, compiles, composes, contrasts, creates, designs, devises, expresses, facilitates, formulates, generates, incorporates, individualises, initiates, integrates, intervenes, models, modifies, negotiates, plans, progresses, rearranges, reconstructs, reinforces, reorganises, revises, structures, substitutes, validates
Evaluation	Appraises, compares and contrasts, concludes, criticises, critiques, decides, defends, interprets, judges, justifies, reframes, supports

[Bekker, C. and Connellan, G. 2006]

The number of activities for a particular learning resource depends on the purpose and nature of the learning. In a skills driven learning resource, e.g. manual to develop word processing skills, there may be numerous drill type activities, whereas the activities in a work placement guide will be focused on encouraging observation and reflection and will be confined to selected topics. A good rule of thumb is to have at least one activity for each learning outcome. For some learning outcomes you may have several activities but there should not be more than 5 activities per outcome. It is a good idea to include several activities that cluster related outcomes. For example you may encourage students to conduct a survey which demands that they demonstrate diverse skills in order to complete the task.

Writers frequently struggle to create variety and range. Here are some ideas.

<b>ideas for activities</b>	
<ul style="list-style-type: none"> <li>• short answer task</li> <li>• extended answer task</li> <li>• true and false statements</li> <li>• multiple choice</li> <li>• matching task</li> <li>• fill-in-the blank</li> <li>• put in order</li> <li>• complete a task/table/diagram</li> <li>• create something</li> <li>• collect data</li> </ul>	<ul style="list-style-type: none"> <li>• reflect on case studies</li> <li>• make comparisons</li> <li>• simulations</li> <li>• spot the similarities</li> <li>• spot the differences</li> <li>• role plays</li> <li>• prepare presentations</li> <li>• reflect on articles from newspapers</li> </ul>

Make a habit of collecting examples of activities and create your own activity bank. This can help to extend your repertoire.

### **What is a good learning activity?**

Quite simply, a good activity is one that achieves its purpose. Knowing the purpose of an activity is one feature of good learning activities. Here are some questions that summarize the main criteria.

#### **Criteria of good learning activities**

1. Are the activities clearly related to the learning outcomes?
2. Is the purpose of the activities clear to the learners?
3. Will the learners be interested in doing the activities?
4. Are there sufficient activities to give the learners enough practice?
5. Do the activities reflect effective learning processes?
6. Do the activities show a range of difficulty? Is there a good mix of simple and challenging activities?
7. Do the activities enable the learners to achieve the level of knowledge and skills required for the course? (Knowledge, comprehension, application, analysis, synthesis, evaluation)
8. Are the instructions clear and will the learners know exactly what to do?
9. Does the feedback provide the learners with a means of checking their progress?
10. Are the activities realistic in terms of time allocation and the resources required to do the activities?

**Tool 9** is an evaluation instrument that you can use to review your own and other writers' activities to determine how good the activities are and how you might improve them.

### Questions to ask when planning learning activities

1. Why do you want to use the activity? (Purpose)
2. What results do you want to see arising from the activity?
3. What level of activity do you want to use?
4. Who will be involved in the activity? (Does it involve individual or group work?)
5. What specific activity would best meet the expected outcomes?

### Some interesting research facts about how learners use activities

There is evidence from various studies undertaken that most students do activities. Here are some key findings on learner use of activities (Lockwood, 1992)

- The activities at the beginning of a course are used by more students than those later in the course, especially when students are short of time.
- Including an answer grid as part of an activity leads to activity completion levels of 80-100%. Not having an answer grid gives completion levels of 30-50%.
- The more demanding the activity, the lower the response.
- Activities are not completed by learners if they are unsure about what to do.

### Activity structure

The following elements are usually part of a well structured activity:

- Number and heading of activity
- Short motivational introduction
- Clear instructions
- Answer grid
- Time estimate. (In some cases this can be useful as it gives the learners an idea of how much time to budget. It may be more useful to learners to show an overall time allocation for sections in the resource rather than for individual activities)
- Informative feedback. This does not merely offer 'correct answers' but gives additional guidance where necessary.

The example below illustrates this well.

Activity 1: Apostrophes with singular words	Title
This activity will help you improve your use of apostrophes to show possession.	Motivational introduction
Rewrite each of the following to use an apostrophe. We've done the first one for you. 1 the palace of the Queen 2 the book of my friend 3 the computer of Charles 4 the surface of the Earth	Task/instructions
1 the Queen's palace _____ 2 _____ 3 _____ 4 _____	Answer grid + example if needed
Take no more than 3 minutes over this	Time guide
<b>Feedback to Activity 1</b> Your answers should have been as follows: 2 my friend's book. If you wrote my friends' book then your answer refers to a book owned by more than one friend. 3 Charles' computer or Charles's computer. If you wrote Charle's then you should note that the apostrophe never goes inside the original word. It is always after the word. 4 the Earth's surface. If you wrote the Earths' surface then you are referring to more than one Earth.	Feedback Includes comments on likely wrong answers

[Freeman, R. 2004]

This is only an example. It does not mean that all activities have to follow this particular format. What is important is to create a recognizable identity for the activities in a learning resource so that the students can clearly see when they have to engage with an activity.



### Feedback in activities

Feedback is part of the learning dialogue between the learner and facilitator. In a face-to-face learning situation, the facilitator provides ongoing feedback to the learners. This gives learners the confidence that they are on the 'right track' and serves to strengthen learning.

There is often reluctance on the part of educators who freely give feedback during classroom sessions to include feedback in a learning resource. In the words of a participant in a workshop, 'We don't want to give the learners the right answers otherwise they will just copy them'. This concern raises an important issue. How do we help learners to become self directed so that they can use feedback in the way it is intended: to help them check their own progress? Learners will need support to engage actively with the learning resource and educators can help students to view the feedback section as an integral part of the learning journey by including useful additional guidance.

### Writing clearly

As most of the learners use English as an additional language to their home language, it is important to make the text as accessible as possible. We can use layout devices (more about this later in this section), present the information logically, use relevant examples to explain difficult concepts, and write in plain English. Writing simply does not mean writing simplistically but rather using the language well. The educators in the workshops insisted that their learners must be exposed to and become familiar with difficult terms. Continuous glossaries and other methods can help to expand the learners' vocabulary.

So how do you write clearly? Here is a checklist that that helps you when writing and editing.

Table 8

<b>WRITING FOR CLARITY</b>
<p><b>About language</b></p> <ol style="list-style-type: none"> <li>1. Use the familiar word rather than the difficult word. If you want to use an unfamiliar word, then explain what it means</li> <li>2. Use the concrete word rather than the abstract word</li> <li>3. Be direct and use the active voice</li> <li>4. Cut out needless words</li> <li>5. Keep it short – don't bore the learner</li> <li>6. Avoid long complicated sentences</li> <li>7. Use simple connecting words</li> <li>8. Use only one subordinate clause</li> <li>9. Be careful with some short verbs, referral words, slang and jargon.</li> </ol>

**About style and tone**

1. Make it lively and exciting
2. Present your case or argument clearly
3. When necessary, tell stories, use anecdotes and analogies and give examples
4. Use questions to maintain the learner’s interest
5. Make sure your style of writing is consistent with your content
6. Your tone must be appropriate for the material and the target audience.

*[From Hutton, B.]*

**Creating access**

You can use a variety of techniques to make it easy for the learners to find their way in and around the learning resource. We have already indicated how you can make the text more accessible by presenting the information in a logical sequence, by using relevant examples to explain difficult concepts, and by using plain language. The focus here is on using access devices which are used to structure the content.

This table is a summary of the most commonly used devices.

*Table 9*

<b>DEVICES TO PROMOTE ACCESS</b>	
Titles	Use clear, meaningful and descriptive titles for topics and sections. There is evidence that the most effective ones state clearly what the topic is about.
Contents lists	This helps the learner to get an overview of what is in the learning resource. Keep the contents list simple. Cluttered lists can hinder access.
Concept maps	Diagrammatic representations of the course, module, section or concepts can help to provide an overview that shows how various bits fit together.
Learning outcomes	A statement of learning outcomes gives the learner a good idea of what is expected. Present these in a user friendly way for maximum advantage.

Advance organizers	Any device that helps learners to link what they know to new learning. Concept maps and activities can be used for this purpose.
Headings	A test of a good heading is how well it answers the question 'What will I learn when I study this section?'
Numbering	The use of numbering is useful in a lengthy, detailed text to show its structure. It is recommended that you only use three levels of numbering.
Icons	Icons can be helpful in pointing to specific items such as activities, self assessment, readings that appear in the text. If you need a detailed list to explain the icons you have too many. Stick to a few for maximum effect.
Activity grids	Activity grids create spaces for the learners to write their responses. Visually they are easily detected and they can be used to help the learners thread their way through the resource.
Glossaries	It is useful to have a continuous glossary so that learners are able to check the words where they need it. You can also provide a summary list of words at the end of each section or module for easy reference.
Summaries	A summary of the key points in a text helps the learners to check that they have focused on the most important elements. You can encourage the learners to participate in drawing up summaries by adding a summary activity at the end of a section.

A generous page layout using suitable fonts, font sizes and white space makes the materials inviting and easy to follow and gives the learners the impression that it is manageable.

## Reviewing with learners

A very useful way of finding out whether the learning resource will achieve its purpose is to test drive it with the students. This does not have to be a time consuming activity and can include a simple sitting down with a few students to observe how they engage with the learning materials to a more structured intervention such as field testing.

### Observation

Organize with a few learners to work through selected sections of the learning resource and observe how they approach the task. How do they work through the resource? Do they skip around or work systematically through each section? Which activities do they do? Which ones do they ignore? How much do they write in response to activities? Where do they get stuck? Where do they need help? All this helps the author to understand the strengths and weaknesses of the materials. The students may suggest improvements.

### Field testing

This is a more formal approach to testing the materials. A group of students and educators is asked to use the materials in a real learning context. A strategy can be devised to approach this task. The field testing is carried out by individuals or a team of reviewers who are responsible for collecting the information and compiling a short report on their findings.

**Tool 10** is an example of a field testing strategy to pilot selected sections of an activity guide with students in 5 colleges in Limpopo. The tool also includes a set of instruments and a report template.



### REFLECT & ACT

Regular reflection on your experiences can be a valuable way of helping you improve your practice. Record your ideas inside this space.

#### Write, Review, Refine

##### Writing task

1. Create an imaginative activity linked to an outcome of your programme. Keep this draft. You can compare it with your final draft.
2. Use the activity review tool to review the draft and make the necessary changes.
3. Ask a colleague to use the review tool to review your draft and give you feedback. Use the suggestions to improve your draft.
4. Ask a few learners to do the activity. Observe them during the activity and interview them afterwards to get their feedback.
5. Rework your draft in the light of the feedback from students.

**Reflection**

6. Compare your first and final drafts. What changes did you make?

7. What have you learned by doing this task?

## REFERENCES

- Bekker, C. and Connellan, G. (2006), *Aligning learning programmes with NQF registered unit standards, skills programmes and or qualifications*, a SETQAA publication
- Brown, S. and Smith, B. (ed)) (1996) *Resource-based Learning*, Race, P. Helping Students to Learn from Resources, Chap.3, London: Kogan Page
- Commonwealth of Learning, (2005) *Creating Learning Materials for Open and Distance Learning: A Handbook for Authors and Instructional Designers*, Vancouver: The Commonwealth of Learning
- Department of Education (DoE). 2003. *Qualifications and Assessment Policy Framework Grades 10-12 (General)*. Pretoria:DoE.
- Freeman, R. (2004) *Planning and Implementing Open and Distance Learning Systems: A Handbook for Decision Makers*, Vancouver: The Commonwealth of Learning
- Hutton, BBarbara.(undated) *A Manual for Writers of Learning Materials*, Cape Town: Buchu Books
- Lockwood, F. (1992) *Activities in Self Instructional Text*, London: Kogan Page
- Rowntree, D. (1990) *Teaching through Self Instruction*, London: Kogan Page 1
- Romiszowski, A.J. (1986) *Developing Auto-Instructional Materials*, London: Kogan Page
- South African Qualifications Authority (SAQA) (2001), *Criteria and Guidelines for Assessment of Unit Standards and Qualifications*, Pretoria: SAQA
- Wisdom, J. and Gibbs, G. (1994) *Course Design for Resource Based Learning*, Oxford: Centre for Staff Development







---

## TOOLKIT CONTENTS

---

<b>Tool 1</b>	Adaptation strategy	<b>62</b>
<b>Tool 2</b>	Example of what is involved in the design process	<b>65</b>
<b>Tool 3</b>	Views on curriculum	<b>68</b>
<b>Tool 4</b>	Programme outline – an example	<b>69</b>
<b>Tool 5</b>	Overview of outcomes/competences for the Business Administration Programme	<b>77</b>
<b>Tool 6</b>	Example of a structure for an activity guide	<b>81</b>
<b>Tool 7</b>	Learning resource plan	<b>83</b>
<b>Tool 8</b>	Assessment strategy – some guidelines	<b>85</b>
<b>Tool 9</b>	Activity evaluation instrument	<b>89</b>
<b>Tool 10</b>	Field testing strategy	<b>91</b>
<b>POWERPOINT SLIDES</b>		
<b>Slide 1</b>	Overview of the design process	<b>100</b>
<b>Slide 2</b>	How learning resources are used	<b>101</b>
<b>Slide 3</b>	Types of learning resources	<b>103</b>
<b>Slide 4</b>	Seeing the big picture	<b>104</b>
<b>Slides 5, 6 and 7</b>	Examples of approaches to content	<b>105</b>
<b>Slide 8</b>	Integrated approach to assessment	<b>107</b>
<b>Slide 9</b>	The writing process	<b>108</b>
<b>Slide 10</b>	Bloom’s taxonomy	<b>109</b>

## TOOL 1 | ADAPTATION STRATEGY

### To adapt Administration in Business materials from NEC, UK for use in the FETC Business Administration Learning Programme – Level 2

The purpose of the outline is to indicate which areas need to be reworked and supplemented in the light of the particular requirements of the Limpopo FET colleges. Contextual relevance highlights two main areas for guiding the adaptation of materials: Priorities identified for Business Administration learning programmes in South Africa and in particular Limpopo province, and the specific needs of the participants.

The information is organised under the following headings:

- principles guiding the adaptation
- strategies for adaptation
- overview of modules and details of the adaptation required

#### Principles guiding the adaptation

- Up to 30% of the materials may be adapted.
- Minimal changes should be made to the set of materials.
- Supplementary items linked to contextual relevance such as case studies, additional background reading and activities could be included in a supplementary reader.
- Create a SA 'feel' of the materials by using appropriate photographs and illustrations and by means of a South African version of English.
- The language should be accessible to the target group.
- Make allowance for uneven entry skills due to previous inequities in the education and training systems in South Africa and strengthen basic skills.

#### Strategies for adaptation

Guided by the principles outlined above and considering licence, budgetary and time constraints we have identified a number of approaches and methods for adapting a set of materials from the National Extension College (NEC) in the UK. Essentially there are three main tasks: the first involves making minor modifications to the existing materials', the second deals with finding the most appropriate ways of responding to contextual gaps, and the third ensures that the text is accessible for the target group.

#### Make minor modifications to the materials

An initial scanning of the materials should indicate minor changes that are necessary.

- Examples that refer to British business administration practice to be replaced with local examples and a reflection of issues within the local context.
- In some cases the British examples could be retained and supplemented with local ones to show comparative business realities and approaches.
- Photographs should reflect the multi-cultural South African business environment. Due consideration should be given to include both urban and rural settings.

#### Respond appropriately to contextual gaps

Any contextual adaptations can be made quite simply and economically by modifying and changing existing case studies that suit the requirements of a range of different target groups in the South African business environment.

---

The inclusion of additional supplementary case studies, activities and readings is based on:

- the specific needs of the participants who may need strengthening in basic and specific management skills
- the unique demands of the South African business environment in which the learners are or will be working
- the national, provincial and local priorities and needs for business administration.

The selection and inclusion of additional relevant readings will be carried out with discerning caution. The aim is to help but not to overburden. Any reworked sections and supplementary case studies, readings and activities will match the quality of the existing materials.

### **Carry out a language edit**

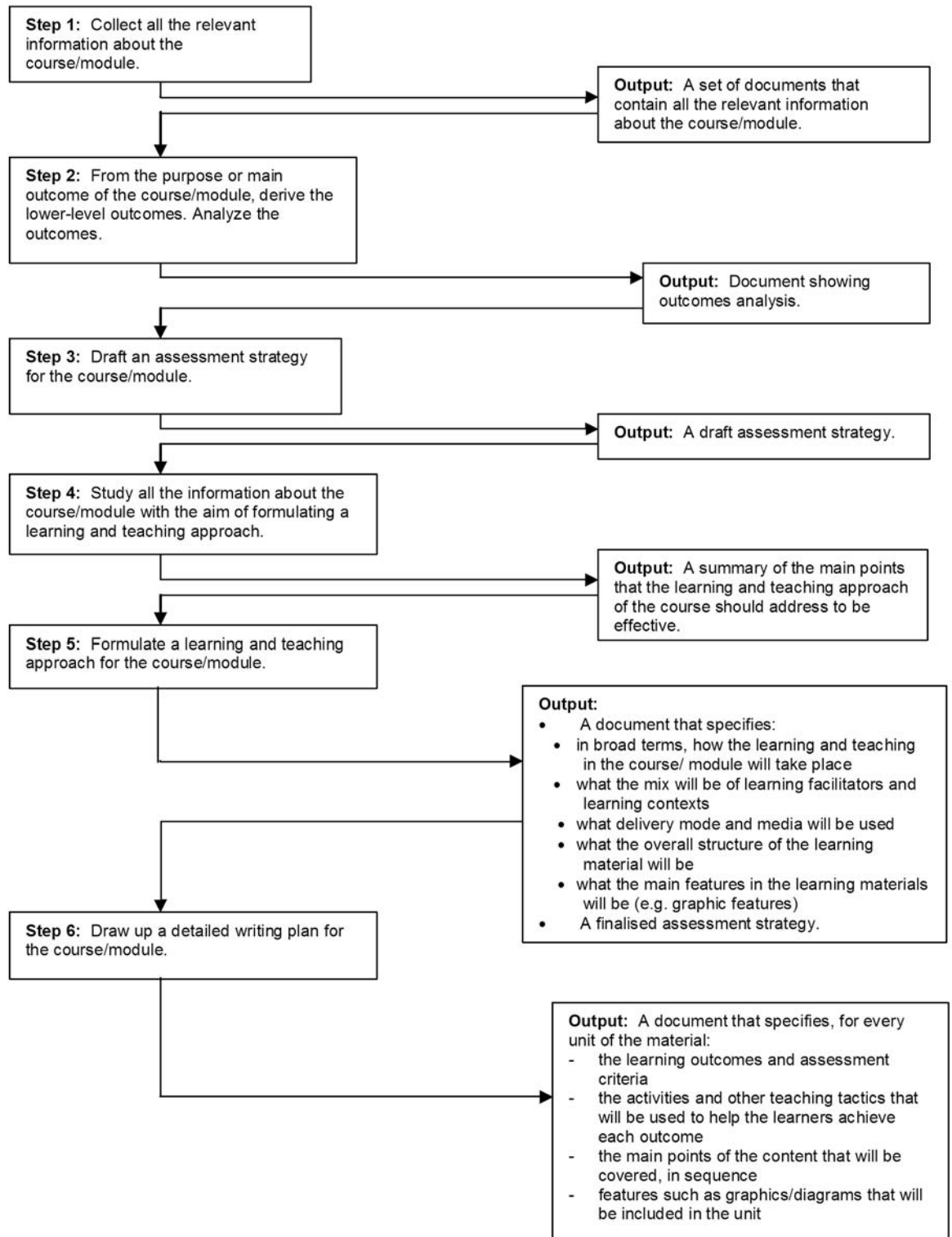
A language edit is necessary with the competence level of the range of target learners in mind – so that they reflect South Africa’s multi-cultural reality, and allow access to learners who use English as an additional rather than main language. Our aim is to make only those changes that would impede the students’ progress and not to tamper drastically with the current well-written text. We want to remove unnecessary linguistic and cultural specific barriers by:

- simplifying difficult text where necessary,
- including examples in the explanation of terms that reflect South African cultural experiences,
- replacing phrases and expressions that are linked to British English with expressions that are more familiar to South African readers,
- removing any ambiguity in the instructions for doing activities,
- adding an in-text glossary of those terms and concepts that are unfamiliar to the target group.

## MODULE OUTLINE

<b>Title of qualification:</b>	
<b>Module topic</b>	
SECTION AND PAGES	DETAILS OF ADAPTATION FOR SA CONTEXT

## TOOL 2 | EXAMPLE OF WHAT IS INVOLVED IN THE DESIGN PROCESS



The explanation on the following page provides some more information on the steps in the diagram above.

## Step 1

### **Assemble existing information, or gather new information on:**

- everything contained in the unit standard – exit-level outcomes, specific outcomes, assessment criteria, credits
- learner profile
- industry profile and needs
- teaching and learning strategy for the qualification as a whole including the use of media and technologies
- assessment strategy for the qualification as a whole
- involvement of co-operative education/experiential training/workplace activities with regard to qualification

**Output: Document or set of documents giving details of the above.**

## Step 2

### **Carry out an analysis:**

- analyse tasks inherent in outcomes, breaking these down into lower-level outcomes
- analyse outcomes in terms of learning prerequisites
- analyse outcomes in terms of type of learning involved (psychomotor, affective, cognitive; where cognitive use taxonomy e.g. Bloom)

**Output: Document setting out finalised set of outcomes, where necessary amended or extended, and classified into types of outcomes.**

## Step 3

### **Draw up an assessment strategy**

The assessment strategy should specify what methods will be used to assess both specific and critical outcomes, what the formative and summative assessment will be and how they will be weighted, how assessment will be integrated with the learning materials, who the assessors will be, how the assessment will be scored, how feedback will be given, how the necessary elements (e.g. feedback) will be managed and administrated

**Output: An assessment plan summarising the above information.**

---

## Steps 4 and 5

### **Use information gathered and analysis to draw up a learning and teaching approach that specifies the following:**

- how the course/module fits into the context of the qualification
- the purpose, specific and chapter-level outcomes for the course/module
- the broad instructional approach that will be followed (with reference to the instructional approach for the qualification as a whole, and with a brief justification, e.g. from literature on learning and instructional theory, and/or educational policy directives)
- how the critical outcomes will be integrated with the course/module
- how co-operative education/experiential learning/workplace learning will be integrated
- an explanation of which mode of delivery and medium/media will be used; if several media are used, an indication of how they will be integrated
- an indication of how the learning materials will be structured and sequenced (with justification)
- for print materials, broad guidelines for the typographical features, including layout, graphic elements, etc.; corresponding guidelines for other media
- an indication of how the teaching approach will be infused in all other aspects of the course as well, e.g. tutorial letters, contact classes
- references

**Output: Document containing above specifications.**

## Step 6:

### **Draw up a writing plan for learning materials that includes the following:**

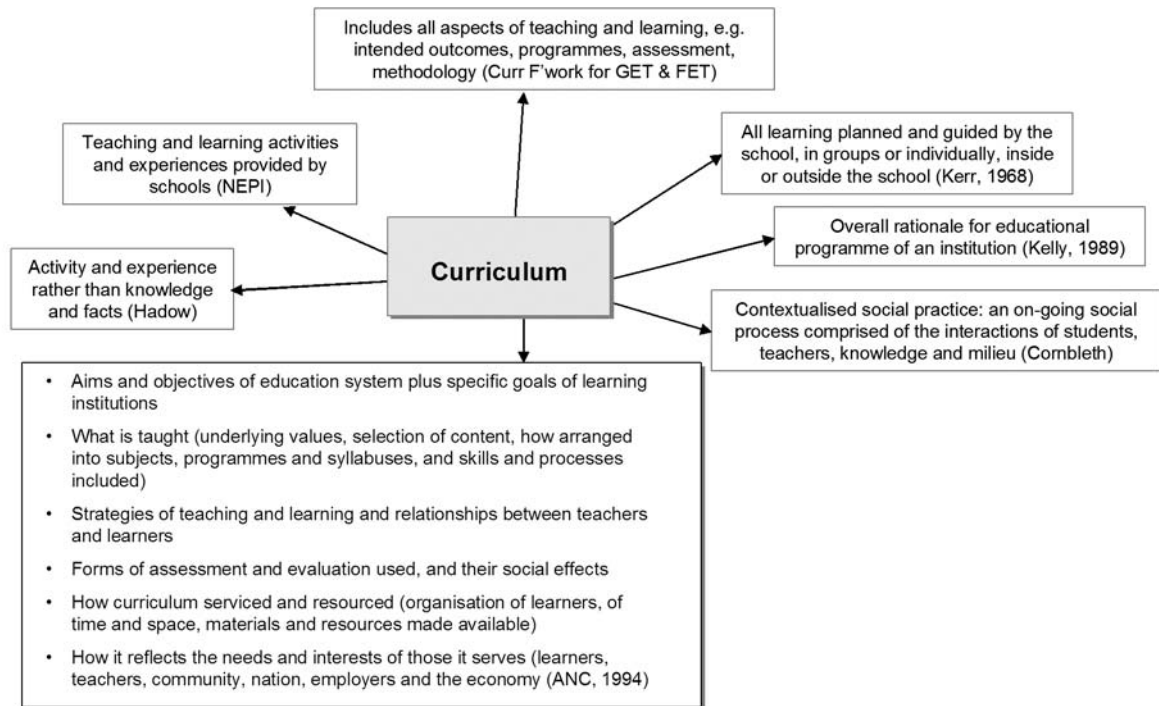
- The number and title of every unit
- The outcomes for that particular unit
- The assessment criteria for those outcomes
- The teaching tactics that will be used to teach the outcomes and/or the activities that the learner will engage in to achieve the outcomes (based on the formulated instructional strategy)
- The assessment of that particular unit and how it will link with formative/summative assessment
- The content covered by every outcome, and the structure and sequence of the content
- For print materials, specifications of layout and graphic features for that unit (e.g. signposting and illustrations); similar specifications for other media

**Output: Writing plan for every unit containing above specifications.**

*[Extract from Part Four of the Report developed jointly by SAIDE and Technikon SA of a materials development capacity building project, August 2002]*

# TOOL 3 | VIEWS ON CURRICULUM

## What constitutes curriculum - a variety of views





---

## TOOL 4 | **PROGRAMME OUTLINE – AN EXAMPLE**

When designing the curriculum of learning programmes it is useful to locate them within the context of the overall qualification. The macro-learning environment provides an overall direction and this helps to create learning and teaching coherence amongst the various subjects/courses that are linked within the programme and the qualification. (Based on information available in May, 2005. The FETC Business Administration Programme was still under review during the time that this programme outline was compiled.)

### **1. Title of qualification**

Further Education and Training Certificate (FETC) (Vocational) Business Administration  
Level 2: Grade 10

### **2. Purpose of the qualification**

The primary purpose of this qualification is to equip learners with the basic knowledge, skills, values and attitudes required for successful entry into an administrative business vocation in all the sectors needing administration skills. The qualification lays the foundation for lifelong learning as well as creating the opportunity for further and higher education.

This qualification is designed to give the qualifying learner relevant and marketable skills and applied competencies necessary to lay a foundation for employment and self-employment within the business sector. Administration competencies and accounting competencies apply to all industries both in the formal and the informal commercial sectors as well as the non commercial sector. The qualification will simultaneously build the cognitive ability and provide the required fundamental learning necessary to access employment in the business sector and related studies at further and higher education level with enhanced employment opportunities.

At this level the qualifying learner will acquire the basic core skills of handling information and communication as well as organization skills and practices and procedures in a business environment as well as the core competencies of accounting.

The qualification forms the basis that can develop into further qualifications at a higher level. It will give the learner the competencies, skills and values to access the FETC Business Administration at Level 3.

The unit standard based qualification is structured to allow progression from the lower to the higher levels. The credits reflect the on-the-job or simulated practical training as well as the theoretical component of the qualification.

### 3. Analysis of industry needs

What are the industry needs? With regard to this field, what skills do employers need? What are critical job performance requirements? Where does the qualification lead? What is the scope for this qualification within the industry? What are the career opportunities?

### 4. Target learners and learning assumed to be in place

What is the learner profile? (Demographic information should include number of potential learners, age range, gender breakdown, main cultural groups, language status, employment status, types of occupation, rural and urban distribution, regional distribution, and special needs. Educational information should include prior knowledge in the field of study, language proficiency, entry level skills, and typical learning styles. Include motivational information such as why learners have enrolled for this programme) What are the needs of learners? (Do the potential learners have the necessary entry level skills? What additional support might be required? Do learners need financial assistance?)

#### Learning assumed to be in place

Literacy, numeracy, communication and language skills equal to a GET NQF Level 1 Certificate or ABET Level 4.

Each individual unit standard reflects the building blocks of knowledge, skills and understanding assumed to be in place. It is important to integrate into the teaching, learning and assessment practices those unit standards that are interdependent.

#### Recognition of prior learning

Learners can access credits towards a whole or part of a qualification, gain credits towards a unit standard or may use prior learning opportunities to accelerate learning. The assessment in RPL must be integrated assessment.

### 5. Credit specifications

The structure of the qualification is set out in the framework document provided by the Department of Education.

The FETC Business Administration Level 2: Grade 10 is structured as follows:

Category	Components	Level 2
<b>Fundamental</b>	Communication and Language 1	20
	Communication and Language 2	20
	Mathematical Literacy/Mathematics	20
	Life skills	10
<b>Core</b>	Business Practice N1	35
	Information Systems	21
<b>Elective</b>	Accounting, or	29
	Office Practice	36
	Total credits 162	

Learners will be able to select Accounting or Office Practice depending on the particular field they want to enter.

#### Total credits required at Level 2

Fundamentals	Core: 1 subject minimum of 20 credits	Electives: 2 subjects minimum of 20 credits each
70 credits	20 credits	40 credits

## 6. Programme outline

There are 7 subjects at FETC Business Administration Level 2. These are divided into fundamentals, core and electives. Students are able to select Accounting or Office Practice depending on the particular field they want to enter.

Category/subjects	SAQA ID	Components	Credits
<sup>1</sup> Fundamentals			
Communication and Language 1			20
Communication and Language 2			20
Mathematical literary/			20

<sup>1</sup> Information has not been completed for the fundamentals

Category/subjects	SAQA ID	Components	Credits
Lifeskills			10
<b>Core</b>			
Business practice	14359	Behave in a professional manner in a business environment	5
	8102	Contribute to the health, safety and security of the workplace	4
	14343	Investigate the structure of an organization as a workplace	8
	14341	Keep informed about the current affairs related to one's own industry	4
	8420	Operate in a team	4
	8618	Organize oneself in a workplace	3
	11235	Maintain effective working relationships with other members of staff	1
	14342	Manage time and work processes within a business environment	4
	14349	Receive and execute instructions	
Information systems	7568	Demonstrate knowledge of and produce word processing documents using basic functions	3
	7571	Demonstrate the ability to use electronic mail software to send and receive messages	3
	14340	Maintain an existing information system in a business environment	4
	7547	Operate a personal computer	6
	7566	Operate personal computer peripherals	3

Category/subjects	SAQA ID	Components	Credits
	14346	Process numerical and text data in a business environment	2
<b>Electives</b>			
Office Practice	14338	Attend to customer enquiries in an office setting	2
	14344	Demonstrate an understanding of a selected business environment	10
	14339	Identify and maintain the types of records required in own industry and understand why it is necessary to create evidence and maintain confidentiality	5
	14350	Receive, consult and direct visitors in a reception area	5
	14355	Order and distribute office supplies	2
	8104	Operate and take care of equipment in an office environment	2
	14346	Process incoming and outgoing telephone calls	3
	14347	Receive, distribute and dispatch mail in an office environment	2
	14351	Maintain a reception area	5
<b>Or</b>			
Accounting		Demonstrate basic accounting principles	12
	7621	Perform basic business calculations in retail/wholesale practices	6
		Administer payment and expenses	4
		Understand the petty cash system	3
		Administer income and receipts	4

## 7. Mode of delivery of the programme

Primarily lecturer/facilitator supported learning with well-designed interactive learning materials. The students will be given opportunities to learn practical skills in simulated and/'real' work learning activities. All learning and teaching will model, outcomes-based best practice. Students are encouraged to work in teams and to undertake collaborative learning where feasible.

## 8. Applied and integrated assessment

Integrated assessment practices are required for this qualification and that implies that the practical and theoretical components are assessed together using a variety of methods and context appropriate tools. Simulations, case studies, role-play and other techniques are used to provide assessment in the context of 'real' work situation when it is not possible to assess on the job.

### Office Practice: Level 2 Business Practice: Level 2

#### Site based assessment (CASS)

Integrated assessment of the theoretical and practical work i.e. projects, written tests, assignments, group work etc. is assessed throughout the year according to the assessment criteria for the specific outcomes calculated and arrived at a mark out of 100% and converted to 60%

#### Summative assessment

##### Component 1

Written, theoretical, 2-hour paper, 100 marks (converted to 20%) externally set and marked.

##### Component 2

Integrated performance assessment to judge applied competency in a range of unit standards, converted to 20% of the final mark.

#### Calculation of the final mark

Site based assessment	60%
Theoretical examination	20%
Performance assessment	20%
Total	100%

### Information Systems: Level 2

**Summative assessment****Component 1**

Practical, computer-based, 2-hour paper, 100 marks (converted to 40%) externally set and marked.

**Calculation of the final mark**

Site based assessment	60%
Performance assessment	40%
Total	100%

**Accounting: Level 2****Site based assessment (CASS)**

Integrated assessment of the theoretical and practical work i.e. projects, written tests, assignments, group work etc. is assessed throughout the year according to the assessment criteria for the specific outcomes calculated and arrived at a mark out of 100% and converted to 60%.

**Summative assessment****Component 1**

Written, theoretical, 2-hour paper, 100 marks (converted to 40%) externally set and marked.

**Calculation of the final mark**

Site based assessment	60%
Theoretical examination	40%
Total	100%

<b>Pass requirements</b>	<b>60%</b>
<b>Pass</b>	<b>80%</b>

**9. Articulation**

The qualification articulates well with the National Certificate in Business Administration: Level 3, as well as the National Certificate in Management: Level 3 and the National Certificate in Public Administration: Level 3

## 10. Quality assurance mechanisms

It is recommended that learning programmes based on this qualification be accredited and quality assured by internal assessors and moderators of the National Education Department of Examination and Assessment as well as the ETQA of Services SETA. Providers offering learning programmes based on these unit standards and qualification will be institutionally accredited and quality assured by the relevant provincial education department, FASSET ETQA and Services SETA ETQA.

Assessors and moderators of this qualification must be accredited and registered with ETDP SETA, FASSET ETQA as well as the Services SETA ETQA.

The qualification and its related unit standards will be moderated according to the moderating mechanisms, procedures, practices and criteria as per agreement between SAQA, FASSET ETQA and Services SETA ETQA.



## TOOL 5 | OVERVIEW OF OUTCOMES/COMPETENCES FOR THE BUSINESS ADMINISTRATION PROGRAMME

(Based on information available in May 2005)

Level 2 – Basic skills	Level 3 – Application of skills	Level 4 – Professional competence
<p><b>CORE</b> <b>Business Practice</b></p> <ul style="list-style-type: none"> <li>• Behave in a professional manner in a business environment</li> <li>• Contribute to the health, safety and security of the workplace</li> <li>• Investigate the structure of an organization as a workplace</li> <li>• Keep Informed about the current affairs related to one's own industry</li> <li>• Operate in a team</li> <li>• Organise oneself in a workplace</li> <li>• Maintain effective working relationships with other members of staff</li> <li>• Manage time and work processes within a business environment</li> <li>• Receive and execute instructions</li> </ul>	<p><b>CORE</b> <b>Business Practice</b></p> <ul style="list-style-type: none"> <li>• Demonstrate an understanding of a selected business environment</li> <li>• Demonstrate understanding of employment relations in an organization</li> <li>• Function in a business environment</li> <li>• Plan and conduct basic research in an office environment</li> <li>• Use communication skills to handle and resolve conflict in the workplace</li> <li>• Introduce new staff to a workplace</li> </ul>	<p><b>CORE</b> <b>Business Studies</b></p> <ul style="list-style-type: none"> <li>• Achieve personal effectiveness in a business environment</li> <li>• Comply with organizational ethics</li> <li>• Display cultural awareness in dealing customers and colleagues</li> <li>• Apply efficient time management to the work of a department/division/section</li> <li>• Work as a project team member</li> <li>• Analyze new developments reported in the media that could impact on the business sector or industry</li> </ul>
<p><b>Information Systems</b></p> <ul style="list-style-type: none"> <li>• Demonstrate knowledge of and produce word processing documents using basic functions</li> <li>• Demonstrate the ability to use electronic mail software to send and receive messages</li> <li>• Maintain an existing information system in a business environment</li> <li>• Operate a personal computer</li> <li>• Operate personal computer peripherals</li> <li>• Process numerical and text data in a business environment</li> </ul>	<p><b>Information Systems</b></p> <ul style="list-style-type: none"> <li>• Demonstrate the ability to use the World Wide Web</li> <li>• Plan, monitor and control an information system in a business environment</li> <li>• Produce and use spreadsheets for business</li> <li>• Produce word-processing documents for business</li> <li>• Prepare and process documents for financial and banking processes</li> </ul>	

Level 2 – Basic skills	Level 3 – Application of skills	Level 4 – Professional competence	
<p><b>ELECTIVES</b> <b>Office Practice</b></p> <ul style="list-style-type: none"> <li>• Attend to customer enquiries in an office setting</li> <li>• Demonstrate an understanding of a selected business environment</li> <li>• Identify and maintain the types of records required in own industry and understand why it is necessary to create evidence and maintain confidentiality</li> <li>• Receive consult and direct visitors in a reception area</li> <li>• Order and distribute office supplies</li> <li>• Operate and take care of equipment in an office environment</li> <li>• Process incoming and outgoing telephone calls</li> <li>• Receive, distribute and dispatch mail in an office environment</li> <li>• Maintain a reception area</li> </ul>	<p><b>ELECTIVES</b> <b>Office Practice</b></p> <ul style="list-style-type: none"> <li>• Co-ordinate meetings, minor events and travel arrangements</li> <li>• Manage the float</li> <li>• Maintain a banking system</li> <li>• Monitor and control office supplies</li> <li>• Monitor and control the maintenance of office equipment</li> <li>• Plan and prepare meeting communications</li> <li>• Attend to customer enquiries face to face and on the telephone in a banking environment</li> <li>• Monitor and control reception area</li> <li>• Monitor and control the receiving and satisfaction of visitors</li> </ul>	<p><b>ELECTIVES</b> <b>Office Practice</b></p> <ul style="list-style-type: none"> <li>• Develop administrative procedures in selected organizations</li> <li>• Manage administration records</li> <li>• Manage service providers in a selected organization</li> <li>• Present information in report format</li> <li>• Contract service providers</li> <li>• Apply the budget function in a business unit</li> <li>• Describe and apply the management of stock and fixed assets in a business unit</li> <li>• Describe and assist in the control of fraud in an office environment</li> </ul>	
<p><b>Accounting</b></p> <ul style="list-style-type: none"> <li>• Demonstrate basic accounting principles</li> <li>• Performing basic business calculations in retail/wholesale practices</li> <li>• Administer payment and expenses</li> <li>• Understand the petty cash system</li> <li>• Administer income and receipts</li> </ul>	<p><b>Accounting</b></p> <ul style="list-style-type: none"> <li>• Compile reconciliation statements</li> <li>• Administer credit purchase transactions</li> <li>• Administer credit sales transactions</li> <li>• Calculate and record Value Added Tax transactions</li> <li>• Prepare salaries</li> <li>• Prepare general ledger accounts and initial trial balance</li> <li>• Prepare wages</li> </ul>	<p><i>Either</i> <b>Office Practice</b> plus one of:</p> <ul style="list-style-type: none"> <li>• Reception</li> <li>• Personal Assistant</li> <li>• Call Centre Administrator</li> <li>• Public Relations Manager</li> </ul>	<p><i>Or</i> <b>Accounting</b> plus one of:</p> <ul style="list-style-type: none"> <li>• Financial Management</li> <li>• Small Business Financial Management</li> </ul>

Level 2 – Basic skills	Level 3 – Application of skills	Level 4 – Professional competence
		<p><b>Reception</b></p> <ul style="list-style-type: none"> <li>• Monitor and evaluate reception area</li> <li>• Process incoming and outgoing telephone calls</li> <li>• Monitor customer satisfaction</li> <li>• Maintain a preventative maintenance programme</li> </ul>
		<p><b>Personal Assistant</b></p> <ul style="list-style-type: none"> <li>• Plan and conduct meetings</li> <li>• Coordinate meetings and minor events</li> <li>• Support event coordination</li> <li>• Identify expertise and resources</li> </ul>
		<p><b>Call Centre Administration</b></p> <ul style="list-style-type: none"> <li>• Describe features, advantages and benefits of a range of products and services</li> <li>• Identify and analyze customer and market related trends</li> </ul>
		<p><b>Public Relations Management</b></p> <ul style="list-style-type: none"> <li>• Explore strategies to retain or expand existing business in one's own organization</li> <li>• Manage service providers</li> <li>• Identify internal and external stakeholders</li> </ul>
		<p><b>Accounting</b></p> <ul style="list-style-type: none"> <li>• Understand and prepare extended trial balances for sole traders and partnerships</li> <li>• Understand and prepare final accounts for sole traders and partnerships</li> <li>• Reconcile the balances of control accounts with total debtors and total creditors</li> </ul>

Level 2 – Basic skills	Level 3 – Application of skills	Level 4 – Professional competence
		<ul style="list-style-type: none"> <li>• Record transactions and prepare financial statements for unincorporated associations</li> <li>• Setting up the system</li> <li>• Enter transactions into the nominal ledgers</li> <li>• Enter transactions into the sales and purchases ledgers</li> <li>• Data integrity and security</li> </ul>
		<p><b>Financial Management</b></p> <ul style="list-style-type: none"> <li>• Describe the control of fraud in an office environment</li> <li>• Interpret basic financial statements</li> <li>• Process financial transactions</li> </ul>
		<p><b>Small Business Financial Management</b></p> <ul style="list-style-type: none"> <li>• Calculate tax payable by a small business</li> <li>• Complete PAYE documents</li> <li>• Cost and price a product</li> <li>• Finalise and interpret accounts</li> <li>• Perform financial planning and control functions for a small business</li> <li>• Record business financial transactions</li> <li>• Manage working capital</li> </ul>

---

## TOOL 6 | EXAMPLE OF A STRUCTURE FOR AN ACTIVITY GUIDE

<b>Finding your way in the world of work Themes in the Activity Guide</b>
<b>THEME 1:</b> Behave professionally at work
<b>THEME 2:</b> Manage the use of time
<b>THEME 3:</b> Work in a team
<b>THEME 4:</b> Work in a safe place
<b>THEME 5:</b> Manage information
<b>THEME 6:</b> Explore the world of business

---

## How the guide is structured

Here is an overview of the different sections that appear in the guide

### **Introductory comments to learners and educators**

The learners and educators are introduced to the activity guide. The information includes guidance on how to navigate their way through the guide and how they can use the guide to best advantage.

### **Short introductions to themes and topics**

The guide is divided into six themes that are linked to selected key learning outcomes. A short introduction provides an overview to the respective themes. These serve to create interest and coherence in the guide.

### **Overall purpose and outcomes**

The key learning outcomes are formulated as questions in a checklist format. This is referred to as the learning target and the students are encouraged to reflect on their progress and tick one of two boxes, I can do this; I need more practice

### **Learning activities**

Varied learning activities are included in each theme. In the introduction to the activity the learners are made aware of its purpose and the benefits of engaging with the activity. Clear instructions indicate what the learners have to do. An action grid is included so that learners are able to record their responses in the guide. Where necessary glossary items referred to as word building are included.

### **Feedback section**

A feedback section is included after each theme or learning unit. The purpose of this section is to help the learners to check their own answers so that they can see whether they are on the right track. The additional guidance provided helps to deepen their understanding of the main learning points...

---

## TOOL 7 | **LEARNING RESOURCE PLAN**

Here are suggested headings for your planning document. Amend them to suit your need.

### **1. Format of learning resource**

Give a brief description of the kind of resource you have selected, e.g. reader, activity guide, manual, handout, study guide, set of articles with activities.

### **2. Purpose of learning resource**

What are your aims in using this resource? Do you want to use the resource to aid the development of specific skills, e.g. keyboard skills, reading and writing skills? Will it serve as additional information to an existing resource? Is its purpose to provide additional support to learn difficult concepts? Is it meant to guide a process which students need to engage with, e.g. planning a research project?

### **3. Main learning outcomes**

What are the main competencies (knowledge, skills and values) you expect the students to learn?

### **4. Learning activities**

Will you include activities? What kind of activities will you include? Give short descriptions of the activities.

### **5. Sequence of content**

What content will you harness? How will you sequence the content? The extracts about sequencing in the section, Useful information, show different ways of sequencing content. Select the approach that is best suited.

### **6. Structure of the resource**

Identify all the components of the resource, e.g. title page; acknowledgements; contents page; general introduction; themes/blocks/sections/units; introductions to themes etc; activities, feedback on activities, summaries, glossaries, reading list, bibliography.

### **7. Features of the resource**

Describe these features of the resource:

- What size publication will the resource be? e.g. A4, A5?
- How long will the resource be? i.e. how many pages?
- What size print will you use?
- Will you use visual material, e.g. illustrations, photographs? Describe them.
- How many copies will you make?
- How will you bind the resource? Staple, ring file, spiral bind, book bind?

## **8. Resources and constraints**

- What resources do you have? (Money, time, staff who have relevant materials design expertise, editors, equipment including computers, illustrator, photographer, word processing expertise, printer?)
- What limits or constraints are you up against? (e.g. lack of commitment from staff and senior management, limited finances, staff and students unprepared to use learning resources.)



## TOOL 8 | ASSESSMENT STRATEGY – SOME GUIDELINES

An assessment strategy typically consists of purposes, principles, and procedures. What often happens is that people rush to work out the procedures before the purposes and principles have been properly considered. What is practical (and cost efficient) often drives the way assessment is done. While it is important to consider the practicality of assessment, the needs of the students and the demands of the curriculum should drive the process – cost effective and practical ways should be found to assess students according to certain principles and for certain purposes.

### Purposes of assessment

According to Mutch and Brown <sup>1</sup>, the purposes of assessment can be categorised as follows:

#### Learning

- To provide feedback to students to improve their learning
- To motivate students
- To diagnose a student's strengths and weaknesses
- To help students to develop their skills of self-assessment
- To provide a profile of what a student has learnt

#### Certification

- To pass or fail a student
- To grade or rank a student
- To licence to proceed
- To licence to practice
- To select for future courses
- To select for future employment
- To predict success in employment

#### Quality assurance

- To provide feedback to lecturers on student learning
- To improve teaching
- To evaluate a course's strengths and weaknesses
- To ensure the course is credit worth to other institutions and employers

### Principles

These include the following:

- Is there a commitment to assessing practice, and not just theory? What skills, knowledge, values and attitudes should the learners acquire? Does practice include ability to reflect on practice?

<sup>1</sup> Mutch, Alistair, and Brown, George, 2001, *Assessment: A Guide for Heads of Department*, Assessment Series no 2, Learning and Teaching Support Network Generic Centre

- Is there a clear link between assessment, teaching and learning? How is the link between teaching, learning and assessment understood and structured into the assessment strategy?
- Are a variety of assessment methods used to ensure that a range of learning outcomes can be validly assessed?
- Are the people involved in gathering the evidence properly trained?
- Are the structures and procedures in place to record the assessment accurately?
- What arrangements have been made to report timeously on the assessment to students and educators?

### **Planning an integrated strategy**

Three levels of planning are necessary:

1. Phase level planning
2. Grade level planning
3. Lesson level planning

#### **Phase level planning**

Concerns progression across the phase, e.g. grades 10 – 12 and for FET levels 2 – 4: and what that involves is clustering and sequencing learning outcomes and assessment standards and identifying, organizing themes and contexts and overall assessment strategy.

For example for Office Practice, Level 2, the following are given requirements:

- 60% site based (CASS)
- 20% external examination (summative)
- 20% performance based assessment (integrated assessment and applied competence)

Most of the assessment is the responsibility of FET colleges.

#### **Grade level planning**

Concerns the planning for the particular grade/level e.g. level 2. It builds upon the phase level planning but provides more detail. For example it takes the clustering and sequencing of learning outcomes and assessment standards decided at the previous level and answers the following additional questions:

- How much time will we devote to each learning outcome/assessment standard cluster?
- What resources will be needed?
- How will we assess?
  - o What method is most appropriate? E.g. written, observation, practical demonstration
  - o What instrument will we use? E.g. for written assessment it could be an examination, an essay, an assignment, short answer test
  - o What assessment tool is needed? E.g. memorandum, rubric
  - o Who will do the assessment? Self, peer, tutor
- What are the possibilities for integration?

### Lesson level planning

This level of planning looks at individual lessons which could comprise as little as a single timetable period or may span several weeks of learning. At this level we are concerned with the actual learning and assessment activities and the micro planning associated with these. The following table can be used to assist planning at this level.

Learning outcome(s)	Assessment standard(s)	Lesson phases	Assessment activities	Resources required	Time needed
		Introduction			
		New learning			
		Consolidation			

## Procedures

An example of a set of procedures that need to be considered in the management of assessment comes from an evaluation SAIDE carried out of the assessment processes in a B Ed Honours programme. This example merely gives an idea of the kind of information to include. Obviously, the nature of the programme will dictate what kinds of procedures are necessary. For example in a vocational programme in which students are expected to carry out practical activities in work settings, detailed assessment procedures will be included about portfolios or the completion of observation sheets and work experience logs.

### Submission of assignments by students

An example of the procedures:

- At a residential session, student provided with assignment cover.
- Student attaches assignment cover to assignment and fills it in.
- Student posts assignment on due date.
- OR students hand in assignments to tutors at residentials

### Extensions on assignments

### Receipt and distribution of assignments to tutors

### Marking procedures

For example,

- Tutors skim assignments on receipt.
- Tutors meet to set criteria.

- Tutors mark according to criteria and make in-text as well as end of assignment comments on concepts, language, and organization/structure.
- Course writer moderates after marking.
- Course writer signs students' assignment for moderation.
- If moderation throws up problem, either remark by course writer or second meeting.
- Course writer prepares tutorial letter about concepts as well as strategies for assignment completion and study.
- Tutors record marks on list and assignment cover.

### **Resubmission of assignments**

### **Record-keeping and return of assignments to students**

### **Appeals**

## TOOL 9 | ACTIVITY EVALUATION INSTRUMENT

Name of Module/Course		
Criteria of good learning activities	Comments about Activity No.	Comments about Activity No.
1. How is the activity related to the learning outcomes?		
2. How is the purpose of the activity communicated to the learners?		
3. Will the learners be interested in doing the activity? Why?		
4. What kind of learning approach is used in the activity?		
5. What level of knowledge and skills are the learners expected to learn? (Knowledge, comprehension, application, analysis, synthesis, evaluation)  What do you think of the level at which the activity is pitched?		
6. Are the instructions clear and will the learners know exactly what to do?		
7. Does the feedback provide the learners with a means of checking their progress?		

Criteria of good learning activities	Comments about Activity No.	Comments about Activity No.
8. Is the activity realistic in terms of time allocation and the resources required to do the activities?		
<b>Looking at the activities in the section as a whole</b>		
9. Are there sufficient activities to give the learners enough practice?		
10. Do the activities enable the learners to achieve the level of knowledge and skills required for the course? (Knowledge, comprehension, application, analysis, synthesis, evaluation)		
11. Do the activities show a range of difficulty? Is there a good mix of simple and challenging activities?		

---

## TOOL 10 | FIELD TESTING STRATEGY

### About developmental testing

#### Introduction

Developmental testing allows you to find out if the learning materials you have developed really work. It takes place during the preparation phase and involves trying out a selected sample of the draft materials with learners. The feedback received is then used to inform the revision of the materials before they are finalized and printed or copied to CD.

Different terms seem to be in use: developmental testing, field testing, and piloting. So what is the difference between them? One<sup>1</sup> source describes developmental testing as a user review carried out in a controlled environment with a group of learners or individuals who are representative of the target learners. Piloting is seen as a user review that is carried out in the environment and exact conditions where the learning materials will be used. For the pilot there is no briefing and no interruptions. The learning package, the learner and the facilitator all engage with the package. The reviewer acts as an observer and is careful not to influence in any way the use of the learning package.<sup>1</sup> As the name implies, field testing is undertaken in the environment in which the learning materials will be used. As such it is closely aligned to piloting.

From the literature it appears that developmental testing is the more comprehensive term that includes a variety of different techniques, from a fairly informal try-out by learners to a structured procedure. It seems that the purpose of the developmental testing, its duration, the place and the people involved in the testing are all factors that influence the method to be selected.

#### Field testing the Activity Guide – the purpose and focus

The purpose of carrying out a user review of the guide is to determine:

- How this resource can be used by FET educators in the classroom with the learners.
- How well suited the activities are to develop the skills identified in the programme.
- How interested the learners are to do the activities.
- Whether the instructions for the activities are clear enough so that the learners can easily understand what they have to do.

We will use the term field testing to describe our review activities. It is not a very structured and in-depth review but rather a try-out of selected activities with a sample of educators and learners in two identified FET colleges in Limpopo. The review will be carried out by members of the Core Team.

#### Approach and methods

The review takes place in the course of a normal college lesson during which the learners will engage with a selection of activities from the activity guide. The researcher and the educator will discuss how best to organize the interaction with the activities.

Our aim is to collect qualitative information in a short time period. Two research methods that will enable us to do this are: observation and interviews.

---

<sup>1</sup> Piskurich, G.M. (1993) Self-Directed Learning: a practical guide to design, development, and implementation, *Debugging your Package Chap 6*, Jossey-Bass Inc., Publishers, California

### Observation

Observation as a research method has advantages over interviews and questionnaires. As a direct observer the researcher can record information about the behaviour of the educators and the learners without having to rely on the account of a third party. There are however also limitations. People may consciously or unconsciously change the way they behave because they are being observed and accounts of their behaviour may be an inaccurate representation of their normal behaviour. Another constraint is that the information which is gathered is filtered through the lens of the observer. Observation is also very time-consuming and the researcher can only observe a restricted sample of the target audience.

As our aim is to collect qualitative information we favour a flexible observation approach. The researcher will make detailed notes preferably during the lesson or immediately afterwards. A major influence on the accuracy of such notes is when they are made. If too much time elapses between the observation and note taking there is increased likelihood that the information will be inaccurate and that biases creep in. Whatever style or format the researcher chooses, it is essential that the notes contain basic information about who participated, when, and what they did. The researcher should note any problems experienced by the learners. These can be teased out and discussed afterwards during the focus group interview.

### Interviews

The interview has been described as a conversation between researcher and respondent with the purpose of eliciting certain information. "A major advantage of the interview is its adaptability. A skilful interviewer can follow up ideas, probe responses and investigate motives and feelings, which the questionnaire can never do.... Questionnaire responses have to be taken at face value, but a response in an interview can be developed and clarified. A further advantage of the interview is that questions can be rephrased and unanticipated issues can be taken cognisance of."<sup>2</sup>

We envisage two sets of interviews that will take place immediately after the observation: a focus group interview with a representative group of learners (e.g. 10 learners) and an interview with the educator. In each case the researcher will be guided by key questions on prepared interview schedules. The researcher will create a non threatening atmosphere during which a conversation takes place. The researcher encourages the learners and the educator to share their experiences and facilitates a discussion on any problems experienced. The aim is to find out what is working and why, what is not working and why and how the activities might be improved.

### Process

The field testing process comprises the following components:

- 1. Meeting with the educator to introduce the field testing activity**

During this meeting the researcher:

---

<sup>2</sup> Bell, J. (1993). *Doing Your Research Project*. Buckingham Open University Press



- 
- Introduces the field testing process and explains how it will work.
  - Discusses how best to manage the interaction of the learners with the activities.
  - Explains what role the educator will play. The educator can play a dual role: facilitate the learner's engagement with the activities and be an observer.
  - Describes the researcher's role during the lesson.
  - Confirms the availability of the educators and learners for a short post-lesson interview.
  - Responds to any queries the educator may have.
  - Checks that the educator understands his/her role during the lesson.

## **2. Observation of the learners using the activities during a lesson**

The session starts with a short introduction to the activity guide and the field testing process. The researcher can make a short input about the aim of field testing the activities and the need for full participation by the learners in order to improve this learning resource. The educator can introduce the activity guide and explain how the learners will engage with a sample of activities from the guide. It is useful to divide the learners into small groups of four. Each group receives a set of activities. Time will not permit them to do all the activities. They can select a few for in-depth engagement and read and discuss others in terms of what they like about the activities, what they don't and what suggestions they have for improving them.

The researcher notes how the educator introduces the activities and how the learners engage with them.

## **3. Focus interview with the learners**

During the focus interview with the learners the researcher probes what worked well, where the learners experienced problems and what suggestions they have for improving the activities.

## **4. Interview with the educator**

Use the interview to reflect with the educator on the field testing experience. Make a note of any questions and concerns. Now that the educator has had some experience of the activities discuss how s/he intends to use such activities in the future.

## **5. Post field testing discussion by researcher**

The team of researchers reflects on the field testing experience and draws out the most important findings. The report template is discussed and responsibility for report writing is agreed on.

## **6. Compilation of report**

The research team compiles a report of the findings. This report will be used by the materials development team to refine the activity guide.

## Observation instrument

Complete these details

Name of FET College

Venue

Date

Time

Programme

Topic of lesson

Name of educator

Number of learners

Observer

Our aim is to collect qualitative information about how the learners engage with the activities. We want answers to the following key questions:

1. How are the learners responding to the activities?
  - Look out for signs of interest and boredom.
  - Can they understand the instructions? Do they need help to figure them out?
  - How long does it take the learners to do each activity?
  - Which activities do the learners seem to like best?
  - Which activities do they not like?
2. What role did the educator play?
  - How did s/he introduce the activities?
  - What help did s/he give the learners?
  - What did the educator do while the learners were busy with the activities?
  - What is the educator's attitude to the activities?

### Observer's notes

Your most important role is to observe what is happening. If possible make short notes as you observe. Do not try to analyze what you see. Merely observe.

### Pre-lesson observations

Describe the classroom, how it is organized and what equipment you notice. Write down how many learners there are.

### Observations during the lesson

Walk around and observe how the learners get to grips with the activities. Make notes every 5 or 10 minutes.

---

Time	My notes

## Focus Interview Schedule with Learners

INTERVIEWER	DATE	TIME TAKEN
<b>GROUP OF LEARNERS INTERVIEWED</b>		
1.	6.	
2.	7.	
3.	8.	
4.	9.	
5.	10.	

### Introduction

The focus is on the learners' experience of engaging with the activities. Get them to reflect on their experience and probe to get as close as you can to the reality. Beware of leading the learners to tell you what they think you want to hear. Identify some common problems and facilitate a discussion during which you encourage them to come up with suggestions for improving the activities. Also note any ideas they have for additional activities.

### Some questions

These are suggested questions you might use during the interview. Let the interview flow as a conversation and just use the questions as a check that you have covered the most important aspects.

1. What are your reactions to the activities you engaged with?
2. What new insights have you gained?
3. Which activities did you like the best? Why?
4. Which activities did you not like? Why?
5. Which activities did you find most difficult? What made them difficult?
6. What suggestions do you have for improving the activities?
7. Do you have suggestions for any other activities that could be included?
8. How useful is a guide that contains such activities?

---

## Interview Schedule with the Educator

INTERVIEWER	DATE	TIME TAKEN
EDUCATOR INTERVIEWED		

### Introduction

The focus is on the educator's views of the activities. Reflect critically on the experience and together probe the suitability of the activities in terms of programme outcomes and contextual reality. Encourage the educator to share how s/he would use an activity guide containing such activities in the future.

Some questions

These are suggested questions you might use during the interview. Let the interview flow as a conversation and just use the questions as a check that you have covered the most important aspects.

1. What are your first impressions of the activity driven session?
2. What new insights have you gained?
3. What do you think worked best?
4. What were some of the problems experienced? Why?
5. Which activities would you use in the future? Why?
6. Which activities would you not use? Why?
7. How do you suggest we improve the activities to make them more relevant?
8. How would you use an activity guide that contains such activities?

## **Report on Field Testing Selected Activities from the Activity Guide**

The report must be concise and focused yet have enough information to be useful. The headings and points to be included are merely suggestions. Feel free to make any changes you think may be necessary.

### **Introduction**

Aim of the field testing  
Overall impressions

### **Description of the field testing process**

How did the research team prepare for the field testing?  
Which FET Colleges were involved?  
How did you brief the educators?  
How did you organize the learners' engagement with the materials?  
What went well?  
What difficulties did you encounter? How did you deal with them?

### **Results of our observations**

Give a description of the main points you observed.  
Results of the focus interviews with learners  
Present the main points of your interviews with the learners.  
Results of the interviews with educators  
Present the main points of your interviews with the learners.

### **Findings**

What do the observations, interviews with learners and educators show? What are the implications?

### **Suggestions**

Present a clear set of suggestions for the revision of the activities, and the use of activity guides.

**Appendix 1: List of educators and learners involved in the field testing**

**Appendix 2: Observation notes**



# Overview of the design process

## Some questions before you start

**Clarify how you will use the learning resources**

1. Who is your audience?
2. What are the purpose and main outcomes of the programme for which you need learning resources?
3. How will the learning resources be used?



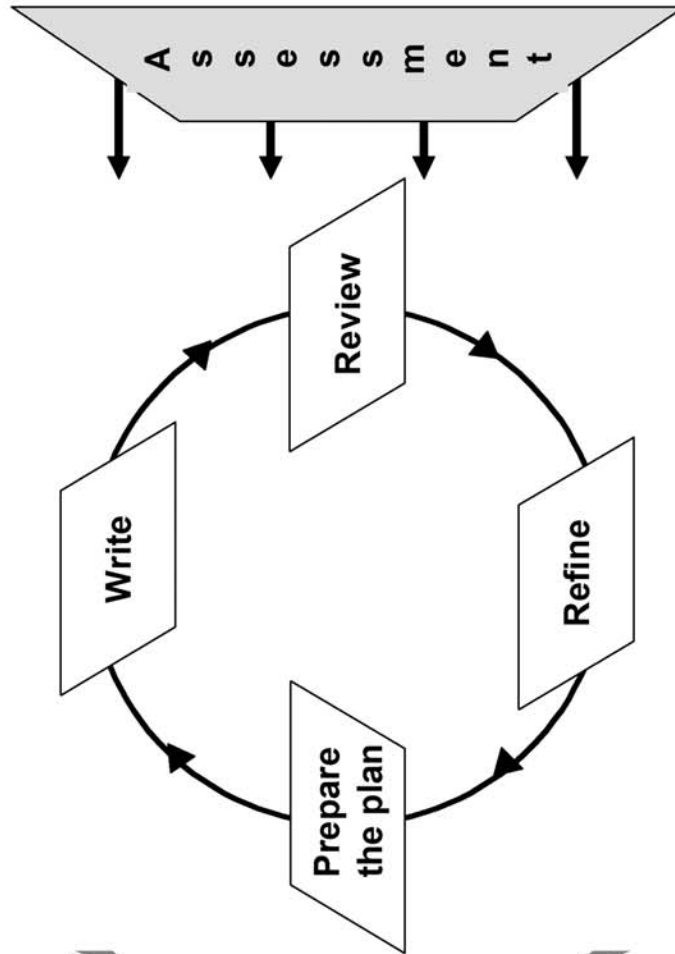
**Select suitable learning resources**

1. What type of learning resource best meets the needs identified?



**Decide on the method: create or adapt**

1. When do you need the learning resources?
2. Can you make use of existing resources?
3. Do you have the capability and resources necessary to produce the learning resources?





**How learning resources are used**

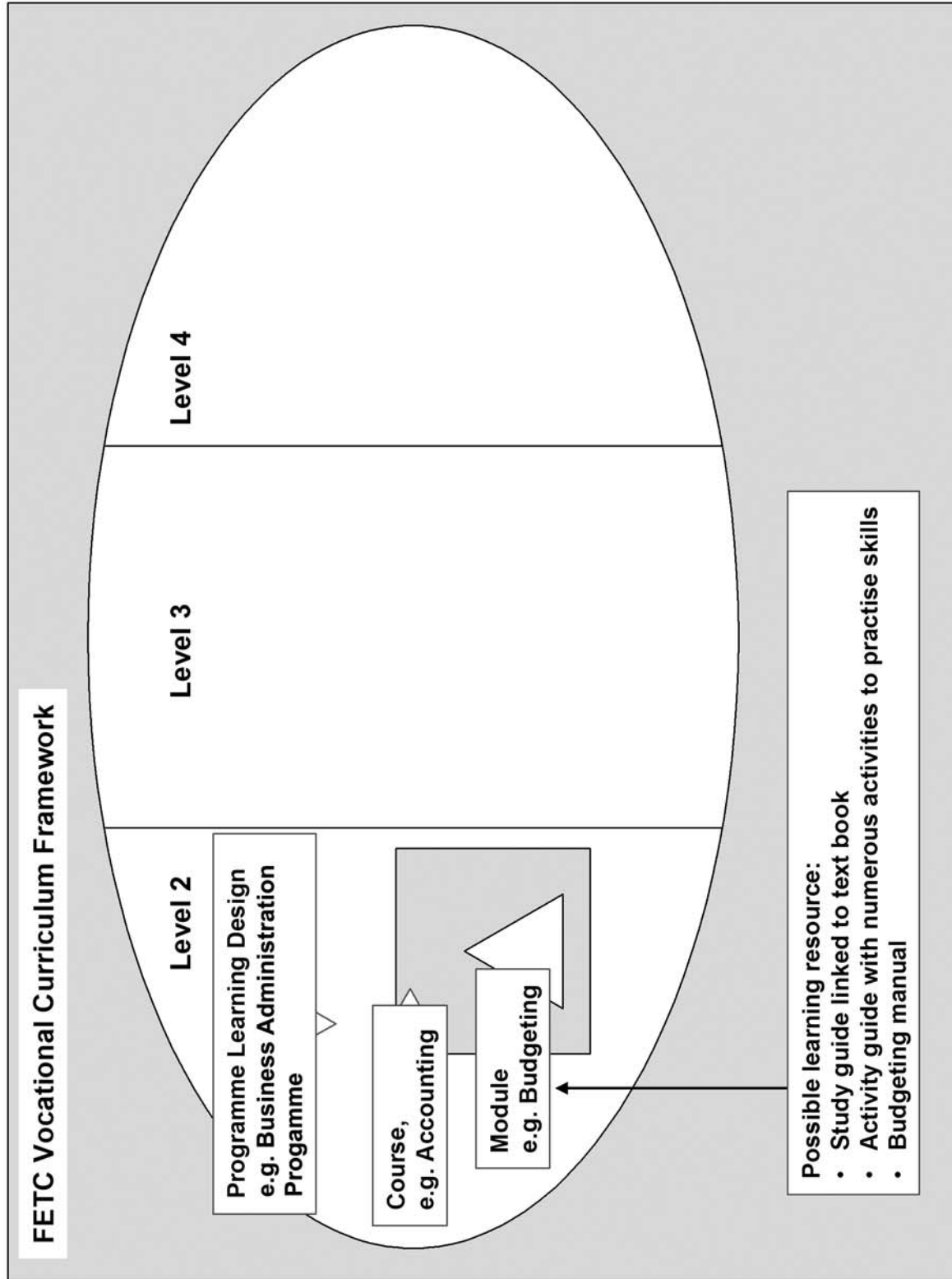
<p>The facilitator makes a presentation or gives a lecture.</p>	<p>A few notes are handed to learners that summarize the main points.</p>
<p>The facilitator facilitates learning in a class or workshop situation using a variety of methods.</p>	<p>Supporting materials are compiled and used to:</p> <ul style="list-style-type: none"> <li>• support the learning activities</li> <li>• summarize main points</li> <li>• offer additional information.</li> </ul>
<p>The contact with the facilitator is limited to specified points in the programme.</p>	<p>Learners work on their own with package of learning resources. Prepare for interactions with facilitator. This method is used in distance education programmes.</p>
<p>All the learning is through learning resources and is done by the learner.</p>	<p>Individuals engage with suitable resources, e.g. manuals, articles, books, Internet.</p>



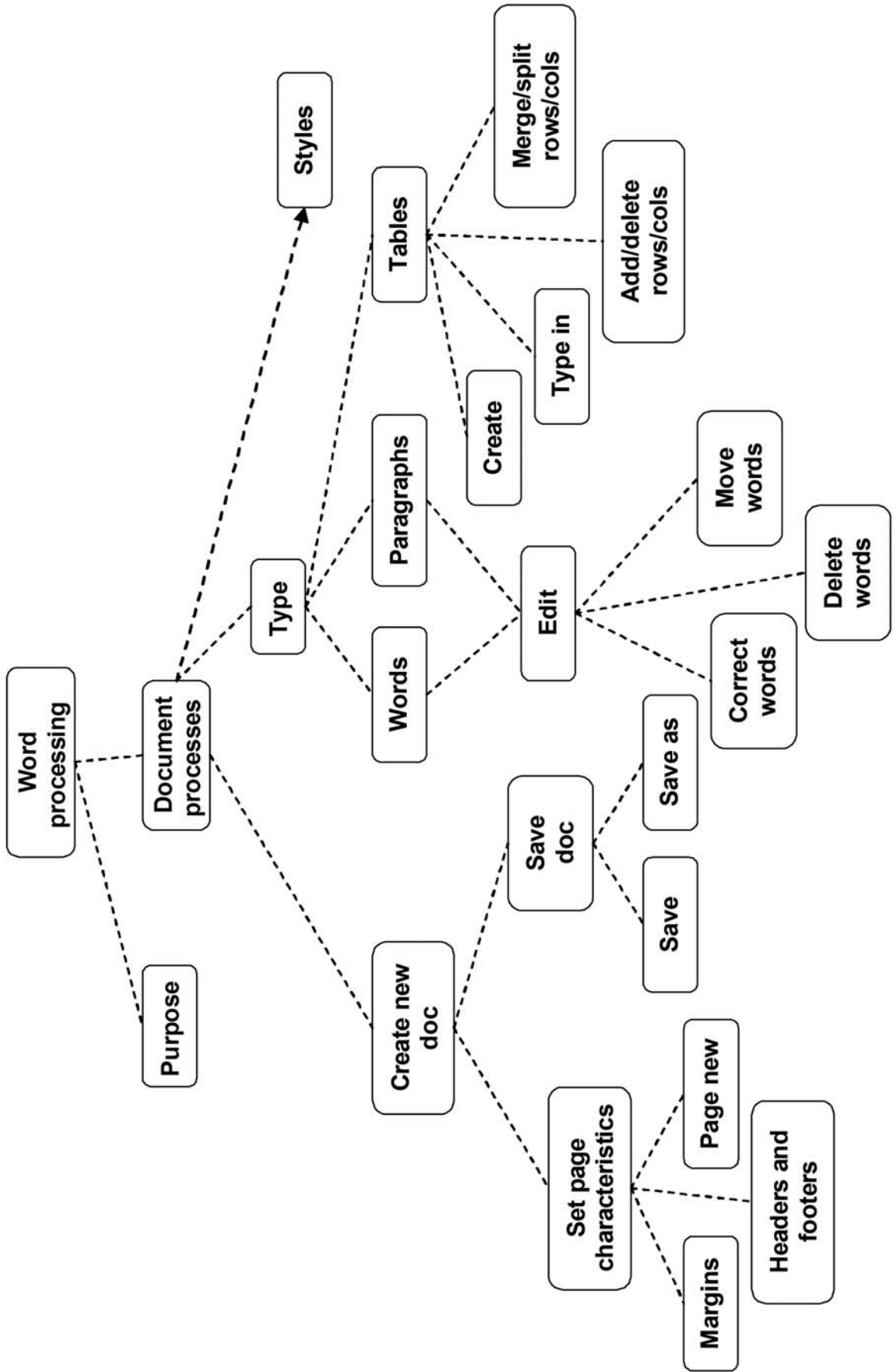
### Types of learning resources

<p><b>Resources that teach course content</b></p>	<ul style="list-style-type: none"> <li>• Open learning materials</li> <li>• Lecture notes</li> <li>• Readers</li> <li>• Reading sets</li> <li>• Resource packs</li> </ul>
<p><b>Resources that build on other resources</b></p>	<ul style="list-style-type: none"> <li>• Textbook study guides</li> <li>• Reading guides</li> <li>• Course guides</li> </ul>
<p><b>Resources that support specific learning activities</b></p>	<ul style="list-style-type: none"> <li>• Manuals</li> <li>• Laboratory guides</li> <li>• Seminar guides</li> <li>• Fieldwork guides</li> <li>• Project guides</li> <li>• Work-placement guides</li> <li>• Staff use of student guides</li> </ul>
<p><b>Resources that support learning processes</b></p>	<ul style="list-style-type: none"> <li>• Skills guides</li> <li>• Skills profiles</li> <li>• Logs</li> </ul>

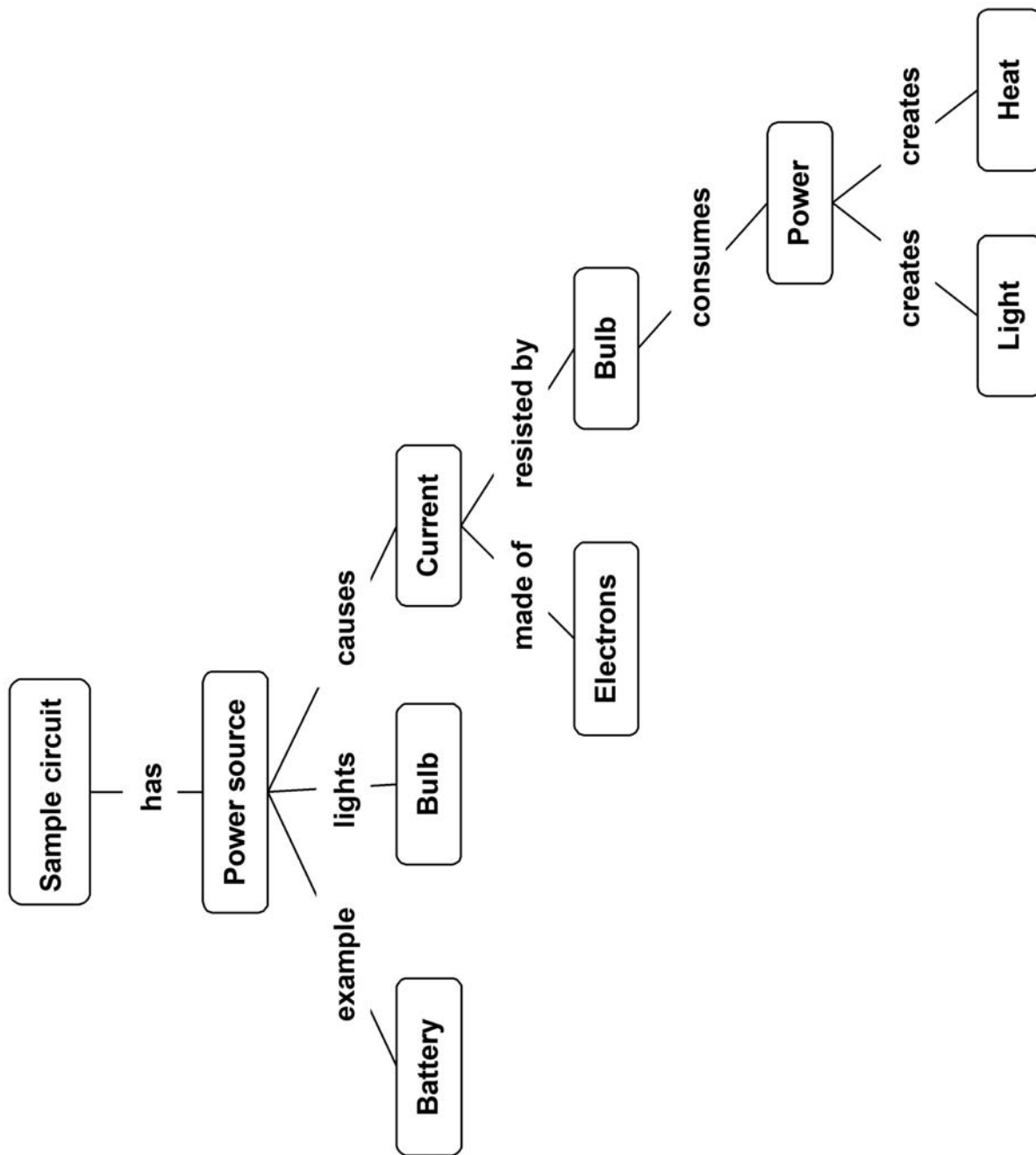
Seeing the big picture



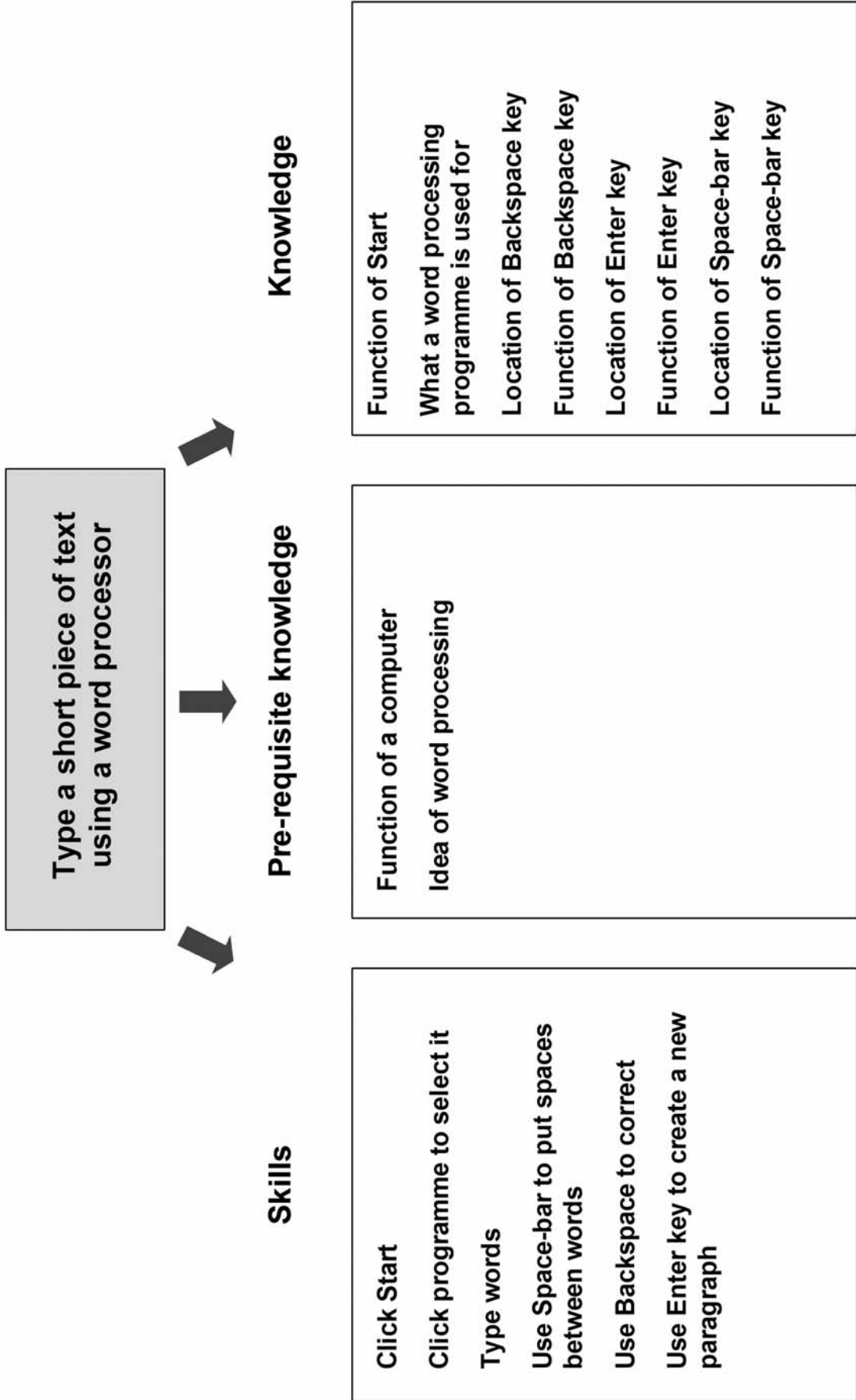
### Sample of a topic approach to content



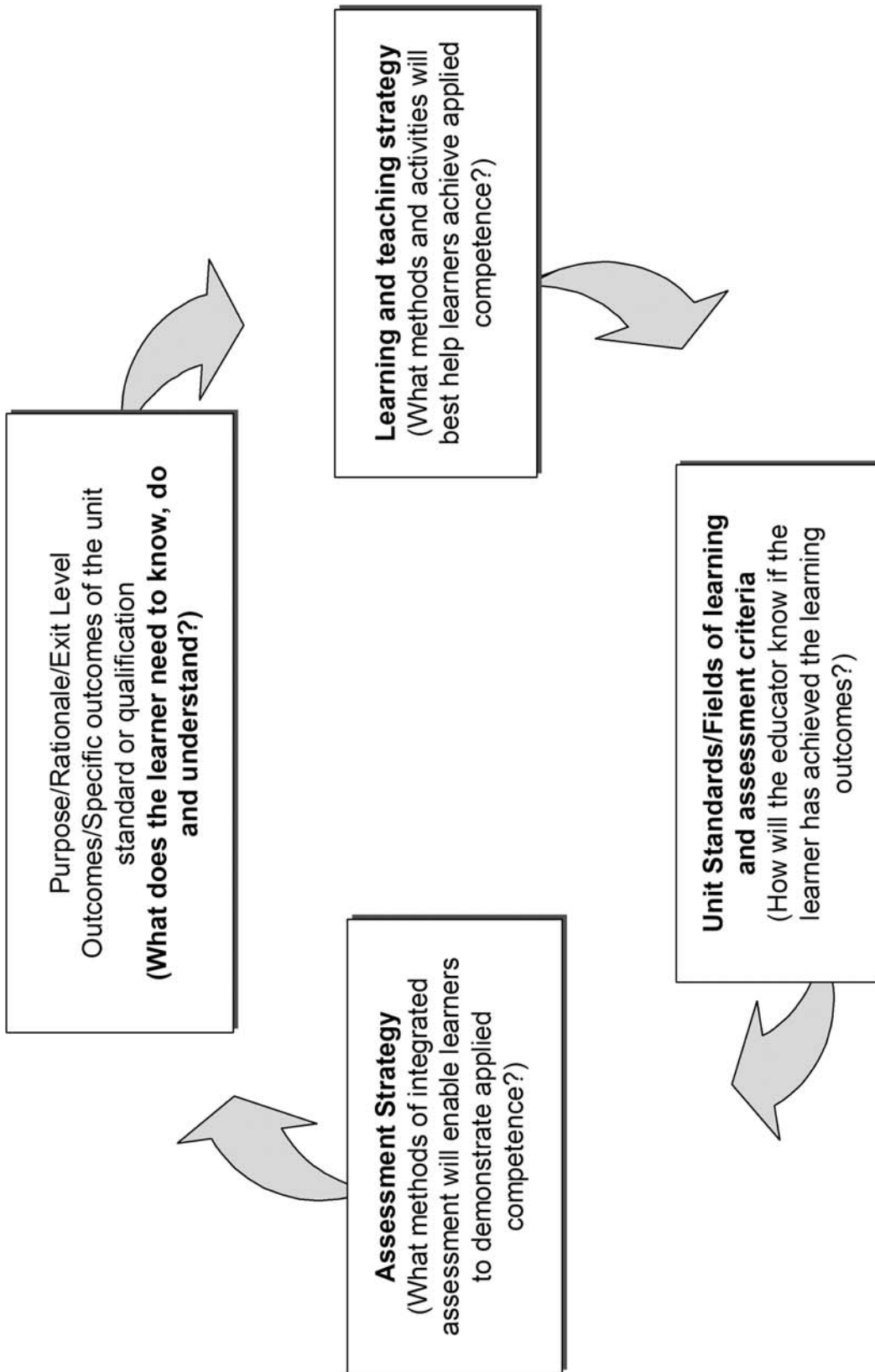
# Sample of a concept approach to content



# Sample of an objective-orientated approach to content

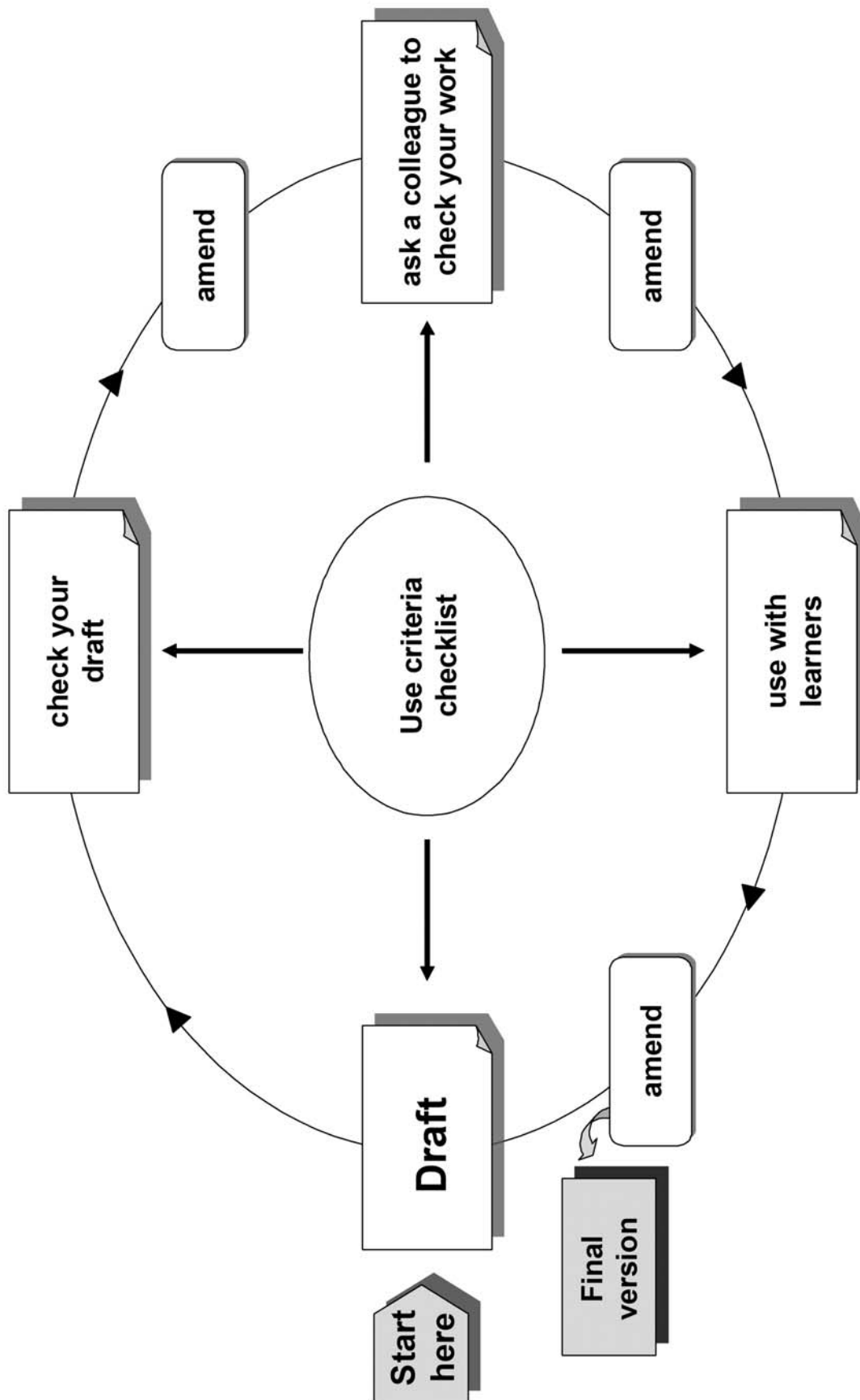


**Towards teaching, learning and assessing in an integrated way**



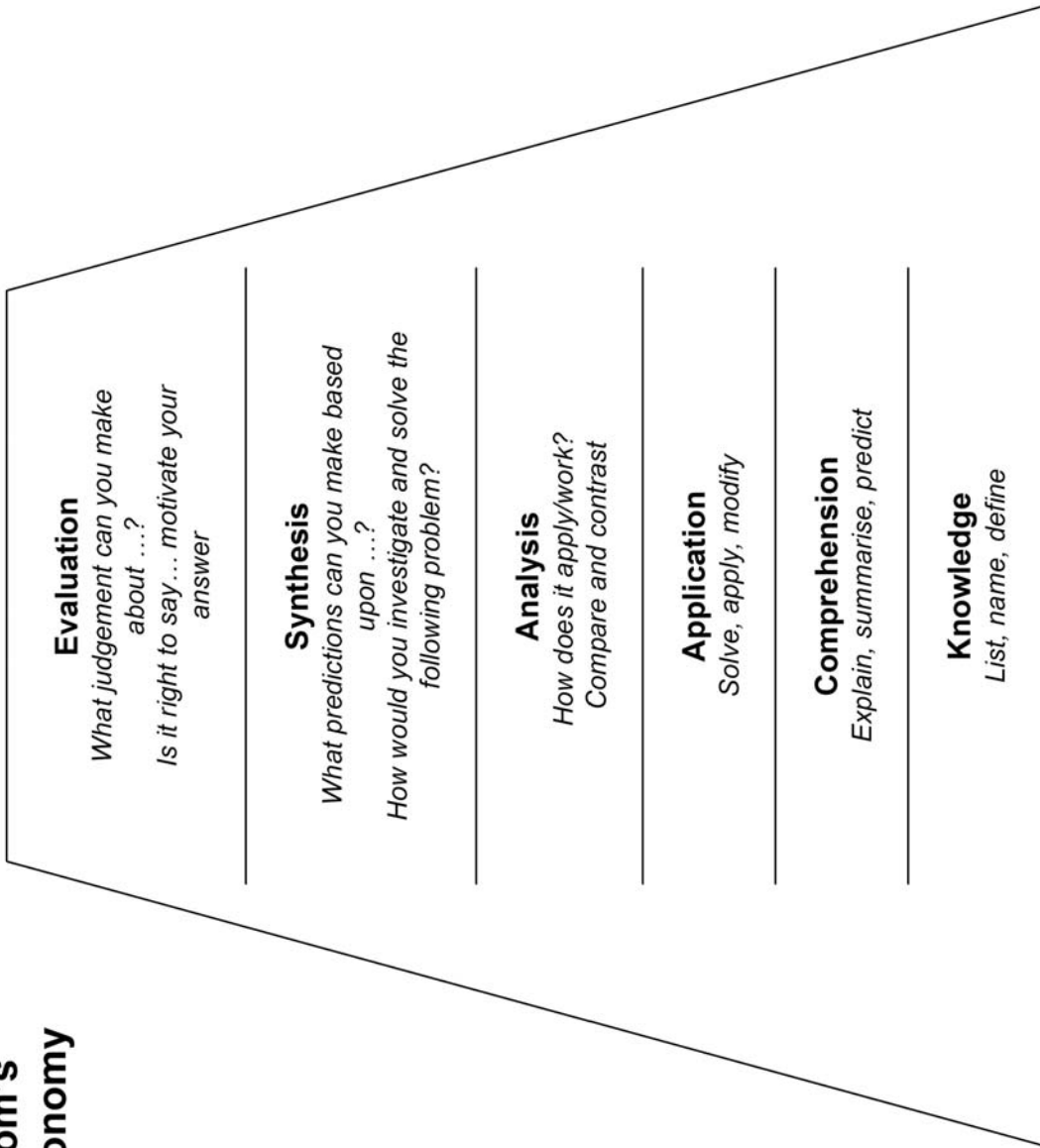
SAQA Guidelines for an Integrated Assessment

# The writing process





# Bloom's taxonomy



From: Bloom, B.S. (ed., et.al.) (1956) *Taxonomy of Education Objectives: Handbook 1, Cognitive Domain*. New York: David McKay Co. Inc



---

---

