

# Makoyda

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# FROM THE EDITOR'S PEN

**Biki Lepota**

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Welcome to the second quarter edition of Makoya.

As depicted on the cover, this edition revolves around diversity. In simple terms, diversity means a range of different things or ideas.

At the heart of the articles featured in this edition is diversity in relation to various topics discussed. For example, one article argues that 'education quality' can mean different things to different people. Another article talks about stakeholders' differences in understanding the approach used to standardise examination marks. Linked to that debate, is a discussion about the diversity of the evidence that is considered during standardisation of examination results.

Looking at diversity along the lines of language is another dimension. The penultimate article in this edition presents three different delegations that had engagements with Umalusi during their study visits. The delegations came from countries with diverse language backgrounds.

The final contribution announces the 40th Association for Education Assessment in Africa (AEAA) Conference, which will draw a diversity of delegates and speakers from across the globe.

Enjoy!



# Address by the Minister of Basic Education during the unveiling of Umalusi's Thuto- Mfundo Building

**Programme Director  
Chairperson of Umalusi Council,  
Prof Yunus Ballim  
Members of the sixth Umalusi  
Council  
CEO of Umalusi, Dr Rakometsi  
Director-General of the Department  
of Basic Education, Mr M Mweli  
Management and staff of Umalusi  
Members of the media  
Ladies and gentlemen**

It is a distinct honour and privilege to stand before you on this auspicious occasion, the official opening of Umalusi's refurbished Thuto-Mfundo Building. The Thuto-Mfundo Building, drawing inspiration from our rich linguistic heritage, is more than bricks and mortar.

Today, the Thuto-Mfundo Building stands before us, not just as an architectural achievement, but as a symbol of our shared journey, representing milestones of resilience, determination and commitment. It stands as a beacon of our collective commitment to a brighter future, anchored in the achievements of the past.

This structure symbolises our dedication to consistently uphold educational standards



**Minister MA Motshekga**

and Umalusi's unwavering commitment to a robust basic education and training system. Within its walls lie the dreams and aspirations of countless individuals who tirelessly work to provide every South African learner with a fair and reliable assessment.

Nelson Mandela once said: "Education is the most powerful weapon which you can use to change the world." In our mission to shape a better world, Umalusi has been our guiding light, leading us toward an enlightened and transformed basic education landscape in our homeland.

This monument stands as an embodiment of our nation's ideals and aspirations in basic education. Every brick and corner resonate with the victories and relentless pursuit of excellence that has characterised our basic educational journey.

Today, we celebrate not just a building, but 21 years of unwavering commitment to educational standards excellence. A commitment that has ensured that South Africa's education system is anchored in quality, credibility and integrity.

Programme Director, Umalusi, derived from the Nguni term meaning “shepherd” or “guardian”, has indeed been the guardian of our nation's educational standards. It safeguards one of our nation's most treasured assets – general and further education and training standards. In our culture, ‘Umalusi’ signifies guarding the family's wealth, and in our national context, there is no greater wealth than the education and potential of our youth.

For over 21 years, Umalusi has played a pivotal role in shaping the educational trajectory of South Africa. Umalusi stands as an epitome of what Greek philosopher Aristotle meant when he said: “We are what we repeatedly do. Excellence, then, is not an act, but a habit.”

As we stand at the cusp of a new era. You might be wondering: What is our basic education policy? In 1940, when faced with the daunting challenge of war, British Prime Minister Winston Churchill declared to the House of Commons: “You ask, what is our policy? I will say, ‘It is to wage war, by sea, land and air, with all our might and with all the strength that God can give us.’” In other words, in our circumstances. We must use every ounce of energy to ensure improved quality of basic education in our lifetime. We must not spare strength, courage or expense.

Taking a cue from Churchill during the war years, I ask: What is our key basic education policy today? I respond with equal determination: Our policy is straightforward –for all children to reach cognitive and other indicators in what is termed “thrive by five”.

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***For over 21 years, Umalusi has played a pivotal role in shaping the educational trajectory of South Africa.***

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For all learners to achieve foundational literacy and numeracy by their tenth birthday, complete the compulsory phase of basic education, and be certified.

You ask: What is our aim? I can answer with one word: Victory—victory at all costs. For us, it boils down to two primary goals: combat the poverty of the mind and unlock the potential of each child to achieve greatness.

All our children must attend schools that nurture their talents. Every child should receive a hot meal daily, have access to psychosocial support, benefit from modern, safe sanitation facilities, be taught by qualified teachers, and have the opportunity to engage in sports.

Every child and teacher must have access to technological devices to facilitate learning and teaching.

We will achieve victory through universal access to two years of early childhood development and by overall improving the quality of basic education, emphasising literacy, numeracy and other critical skills by 2030, whatever the cost.

Programme director, my heartfelt gratitude goes out to both past and present members of the Umalusi Council, our tireless professional teams, and every educator and stakeholder championing the power of education. Your collaborative efforts have ushered us to this momentous day. Umalusi has been a beacon of educational

excellence for over two decades, surmounting challenges with tenacity.

Members of the Umalusi Council bear a significant responsibility, guided by the legal frameworks, to consistently prioritise the organisation's mission. Their decisions are pivotal in upholding the quality of education in South Africa. I applaud the Council's transition to achieving clean audit reports in recent years, highlighting both their financial and advisory diligence. I am optimistic that the Council's future endeavours will further elevate our standards and enrich our educational strategies.

The Thuto-Mfundo Building is a living testament to Umalusi's evolution from its modest roots to its esteemed position today, shining a light on South Africa's educational landscape. A special mention goes to Umalusi's Assessment Standards Committee for its meticulous oversight, ensuring Umalusi's position as a trusted authority in our education system.

Umalusi's legacy is not confined to our borders; its impact is national and international. From developing qualifications and certification systems to initiating research programmes, Umalusi's footprints are profound in the educational arena. Its key initiatives, such as transitioning from the Senior Certificate to the National Senior Certificate, emphasise its central role in maintaining consistent standards for all learners.

Certifying qualifications from the Senior Certificate to the National Senior Certificate and spanning technical vocational education and training (TVET) colleges to adult learning centres, Umalusi has ensured that our learners are given credible certificates that reflect the rigour and quality of our education system. It has set and monitored educational standards,

and played a significant role in developing a qualifications framework for our learners. However, we must not only revel in our past achievements, but look forward with foresight. I call upon Umalusi to embrace self-reflection, innovation and feedback as it charts the next 21 years, exploring greater horizons.

Lastly, I wish to acknowledge the visionaries of Umalusi—past Council chairs like Dr Cassius Lubisi, Mr John Pampallis, Professors Sizwe Mabizela and John Volmink, and Professor Peliwe Lolwana, Umalusi's first CEO, along with her team. Their foundational work has been instrumental in moulding Umalusi's present.

In conclusion, as we stand before the Thuto-Mfundo Building, we are not just inaugurating a structure, but reaffirming our unwavering commitment to the future of our children and South Africa. Umalusi's legacy over the past 21 years has been unparalleled, yet our eyes are set on an even brighter horizon. Let this edifice remind us daily of our pledge to equitable and quality education for all.

Here is to the next chapter of high educational standards, excellence and transformation.

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***Members of the Umalusi Council bear a significant responsibility, guided by the legal frameworks, to consistently prioritise the organisation's mission.***

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# Hello and goodbye

**I would like to express my appreciation to the Chair of Council, Prof Yunus Ballim, and to the CEO, Dr Mafu Rakometsi, for the kind invitation to address Council and share my reflections on the work of Umalusi and its future.**

For me, today's meeting is, in the first place, a "hello and goodbye". It is a "hello" because I missed the opportunity to join the Minister and other friends and colleagues when she welcomed the sixth Umalusi Council at the event in September last year that coincided with Umalusi's 20<sup>th</sup> anniversary. It is a "goodbye" because I am in the process of bidding farewell to my friends and colleagues here in this beautiful country. Let me hasten to assure you that I am not running away from my country, but simply going to join my children and grandchildren. My late wife and I lived in the USA for 10 years, during which time four of our children were born. One of them died tragically in Johannesburg five years ago, but the rest are either already in the USA or on their way there. I have now obtained my immigrant visa (Green Card) and have to leave before June. I then have to remain in the USA for six months before being allowed to travel freely again. I will be a regular visitor here in South Africa.

I feel honoured and privileged to have served as Umalusi's Council Chairperson for a total of 12 years, from the time I took over from John Pampalis in 2006 until 2010 when Minister Motshekga asked me to serve as the CEO of the National Education Evaluation and Development Unit (NEEDU). After just over year at NEEDU, my wife lost her battle with cancer and I left NEEDU.



**Professor John D Volmink**

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However, I was reappointed in 2014 and served until 2022.

## **Education in the democratic era**

The years at Umalusi gave me so much insight into education in South Africa and of the policy-making process. When I first returned in 1990, we were celebrating the chaos and turbulence of a new beginning. The conventional signposts have been swept away and we have been travelling on unchartered waters. It has been exciting to be part of this wonderful and dynamic period of our history. For me, it has been particularly rewarding to be part of the transformation of education.

The education sector in this country faced three major challenges at the dawn of democracy. These were **provision, access (scalability/massification)** and **quality**.



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*The independent school sector, on the other hand, has been able to make much greater progress on quality, but in my view has struggled with the challenges of access and massification.*

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In the public school sector, significant progress has been made on access and massification, particularly at primary school. Virtually all the learners that should be in school are indeed at school in the first three phases of the school system. However, we have been moving along from an early focus on **provision**, which was so necessary in 1994, and still is today, to the current debate where we are asking deep questions about the **quality of that provision**.

The independent school sector, on the other hand, has been able to make much greater progress on **quality**, but in my view has struggled with the challenges of **access and massification**. But I must point out that there is limited consensus on what 'quality' actually entails. In both the public and independent sectors, there has been a preoccupation with the conditions for quality (such as infrastructure, resources, teacher supply and matric results), rather than on **what constitutes quality**; what is at the heart of quality? **So, I do not come with answers, but with questions.**

### Education and the Bill of Rights

My (activist) daughter, who works for the Black Sash is a lawyer. She and I had a difference of opinion when I complained about the protest delivery happening not

far from my home, making it difficult for me to pass. I said something like: "Why does no one in this country ask what I can do for the country, instead of what the country can do for me?" She quickly put me in my place, reminding me that we have a Bill of Rights as part of our Constitution that guarantees us certain rights. She said you either have it or you don't. As stated in our Constitution, "this Bill of Rights is a cornerstone of democracy in South Africa. It **enshrines the rights of all people in our country and affirms the democratic values of human dignity, equality and freedom**". The state must respect, protect, promote and fulfil the rights in the Bill of Rights.

But they are not privileges, they are rights. Therefore we can demand it. Education is such a right. As Prof Churr at the University of South Africa (Unisa) puts it, there are **rights to education** (the right to basic education, the right to learn in an official language of choice) and there are **rights in education** (the right to dignity, equality, protection from abuse, a clean and healthy environment). I just wish that the word 'quality' could have been placed before the word 'education'. I am very much focused on this notion of quality.

### What do we mean by quality?

As the Council responsible for quality assurance, it may be safe to assume that this is also the body taking responsibility for the **promotion of quality**. I have noted that Umalusi has been leading the debate on this issue and must continue to do so with greater vigour and scope. I have just read an interesting paper on educational quality by Robin Alexander of the University of Cambridge, in which he launches a scathing attack on the overuse of **quality indicators** as driven by the Organisation for Economic Cooperation and Development



(OECD), the United Nations Educational, Scientific and Cultural Organisation (UNESCO) and others because this focuses too narrowly on inputs and outcomes, and ignores process. He argues that the notion of **pedagogy** is the most important process issue, and should be central in the quality debate.

He speaks about pedagogy as that which is not only the observable act of teaching, but includes the underlying educational theories, values, knowledge and skills that are needed to make educational decisions.

This made me think about the evidence that different stakeholders use to judge quality. Educational authorities and providers routinely use quality indicators to discuss quality. However, **when learners themselves are asked about educational quality**, they do not talk about the Annual National Assessments (ANAs) and matric results. Instead, they talk about their **felt experience of learning and their relationships with the teacher and their peers**.

Another interesting take on educational quality comes from Richard Elmore of the Harvard Graduate School of Education, who argues that schools do not improve through managerialism. They improve through the demanding work of teaching and learning. Then there is the consortium of researchers led by the University of Bristol (Angeline Barrett and Leon Tikly), whose work I like very much. They speak about the three dimensions of quality:

**Inclusion:** Education that is accessible to all, that is an opportunity to achieve.

**Relevance:** Whereas inclusion concerns who achieves learning outcomes concern what those outcomes are – do they enable learners to participate in society, while still not being alienated from their own context.

**Participation:** This has to do with social justice and underpins inclusion and relevance.

So, there are **different ideologies** that underpin the concept of quality education in different contexts. They can be seen as representing competing world views, but they are not mutually exclusive. On the one hand, there is **the dominant ideology used by many economists** that equates quality strictly with learning achievement, preferably as measured by **standardised tests**. The argument here is that what is important is **how much is learnt** as a result of being in school. So, the investment in education should be on those strategies that will enhance learner achievement in order to improve quality.

There is another world view that argues that this reliance on achievement in standardised tests as the sole definition of quality may be detrimental to the achievement of goals that are not measurable, and hence to the relevance of education. So, the **human rights approach** stems from an ideology that focuses on **equity** in learning experience rather than on standardised test scores. The focus here is on the all-round development of the learner and an environment that supports positive learning experiences for all so that their aspirations can be accommodated as a basic right. So, learners need teamwork and communication skills. Learning how to learn, tolerance, celebrating diversity,

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*One of the proudest moments for me was when Umalusi led a discussion at a forum at Wits University on its report on Sign Language as Home Language, led by Stephen Mchunu.*

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respecting rights and understanding change all become important when speaking about quality education.

One of the **proudest moments** for me was when Umalusi led a discussion at a forum at Wits University on its report on Sign Language as Home Language, led by Stephen Mchunu. This was not about achievement on standardised tests, but on the human rights of dignity and inclusion, and the right to be respected.

Umalusi does an excellent job in fulfilling its mandate, and is highly respected for its work on developing evaluation qualifications and curricula. It does a superb job in moderating the assessment and accreditation of institutions. The list goes on.

It also does good research on a range of issues. It is in this context that I would like to see Umalusi tackle the notion of **educational efficiency** as an element in the debate on quality. The literature indicates that schools with more resources tend to deliver better results, as measured by learner performance. This means that these schools, because they produce good results, become sought after by learners and supported by their parents. So, these schools are assured of more resources and continue to produce better results. But the question can be raised whether high-performing schools are really **efficient**. After all, they take in the better learners, have the most resources and motivated teachers, as well as having very supportive and well-endowed parents and communities.

In contrast, low-performing schools draw learners from disadvantaged backgrounds and do not have adequate resources or

the most highly motivated teachers. Even so, these schools often do a great job in terms of adding value to the learning achievement of their learners. However, because, historically, these learners were not part of the top 20 on the final national list, there is little appreciation of the value they add to their learners. It raises the question of the need for a reconsideration of the distribution of resources to schools.

As an accreditation and quality assurance body, and a leader in the discourse on quality education, Umalusi will never assume that it is above criticism. Its mandate is not only to promote quality in the independent school sector, but also to re-assess its own worldviews and approaches to quality and quality assurance.

I believe that our **future as a country** will be determined by the extent to which we attend to the preparation and retention of our children. Ultimately, it has to do with **nation building** – about building a **just society**.

So, as I close for the last time, I would like to pay tribute to the CEO and the executive team for helping me complete my understanding of what efficiency and effectiveness could mean. I have to check my impulse to mention people by name, because I fear leaving out names. I believe that, to a person, they are consummate professionals whom I admire collectively and individually. Over the years, I have accompanied the executive team to various Portfolio Committee meetings in Parliament, and every time I would walk with my head held high, both when I enter and when I leave. Every time the team has done us proud, and I would like to assure the new Chairperson that this team will never let you down.

# Engaging with educationists at the National Policy Conference of the National Teachers' Union

**On 28 July 2023, I was invited to give a talk on the topic “words of wisdom” at the National Policy Conference of the National Teachers' Union (NATU). In this article, I share with you my thoughts around this topic. The chosen topic is by no means an easy one to tackle in a setting of this nature. At the heart of our difficulty lies the fact that the concept ‘wisdom’ can mean different things to different people. That suggests that, in a gathering like this one, the topic can be approached from different angles or perspectives.**

In preparing my talk, and in order to lead a clear presentation, I decided to consult the Longman Dictionary of Contemporary English (2003), according to which ‘wisdom’ means “good sense and judgement, based especially on your experience of life...”. The same dictionary further asserts that wisdom “is gained over a long period of time through learning or experience”.

Turning the word ‘wisdom’ into an adjective and using it in connection with decision making, the Longman Dictionary



**Dr Mafu S Rakometsi**

of Contemporary English writes that “wise decisions and actions are sensible and based on good judgement...”. Before I delve deeper into this concept in relationship with the work of Umalusi, I would like to say a few things about some of the provisions of South Africa’s Constitution (1996), as amended.

Section 195(1) of the Constitution singles out the following democratic values and principles that govern public administration in our country:

- a) A high standard of professional ethics must be promoted and maintained.
- b) Efficient, economic and effective use of resources must be promoted.
- c) Public administration must be development oriented.
- d) Services must be provided impartially, fairly, equitably and without bias.

- e) People's needs must be responded to, and the public must be encouraged to participate in policy making.
- f) Public administration must be accountable.
- g) Transparency must be fostered by providing the public with timely, accessible and accurate information.
- h) Good human resource management and career development practices to maximise human potential must be cultivated.
- i) Public administration must be broadly representative of the South African people, with employment and personnel management practices based on ability, objectivity, fairness and the need to redress the imbalances of the past to achieve broad representation.

I decided to frame my talk around these values and principles, fully cognisant of the fact that most of us, if not all present here, are public servants. Therefore, these values and principles talk to us as the servants of the South African public. My evaluation of the foregoing values and principles leads me to believe that there is a strong connection between them and ethical conduct in human interactions.

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Umalusi sees no value in entering into fruitless public debates with political commentators, high-level public servants or academics in respect of its standardisation decisions.  
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By ethical conduct, I am referring to us doing what is good or right in our interactions in social settings. According to Rossouw and Van Vuuren (2017), “ethical behaviour results when one does not merely consider what is good for oneself, but also considers what is good for others”. For that reason, I would argue that there is a link between the above constitutional principles and the concept of ‘wisdom’, which is the central concept of my talk. As I have already mentioned, ‘wisdom’ is defined as “good sense and judgement...”.

Bearing the above issues in mind, I will now attempt to connect the concept of ‘wisdom’ with the legislated areas of Umalusi’s work as a social institution. Specifically, I will talk about wisdom as it relates to the standardisation of examination marks. Colleagues, not everybody is aware that during the end-of-year standardisation processes, Umalusi’s Assessment Standards Committee (ASC) makes decisions in respect of over 500 subjects spread across five qualifications assessed by four different assessment bodies.

As a public institution, Umalusi is guided by a set of principles in carrying out its mandate. That notwithstanding, it has become commonplace for the public to comment on the end-of-year examination results by way of implying that Umalusi manipulates marks during its standardisation process. This is a concern to Umalusi because such claims are made without evidence, and speculation is made to appear as fact.

Continuing along the lines of making decisions that are sensible and based on good judgement, I deem it necessary to use this opportunity to briefly provide context to Umalusi’s standardisation approaches and processes. The end-of-year examinations are written by over 1.2 million candidates spread over five qualifications that are assessed by four assessment bodies (the Department of Basic Education (DBE), the Department



of Higher Education and Training (DHET), the Independent Examinations Board (IEB) and the South African Comprehensive Assessment Institute (SACAI).

The standardisation of results that flow from these examinations is a function that the Umalusi Council has assigned to the ASC. Its members are not employees of Umalusi; they are some of the finest minds in our country, associated with various universities. Thus, Umalusi relies heavily on the ASC members' knowledge and wisdom, gained over a long period of time through experience.

It is common cause that the ASC arrives at its decisions after careful analysis of available numerical evidence (tabulated and graphed information) and narrative reports (post-examination analysis reports, reports of internal and external moderators, marking verifiers' reports and chief markers' reports) to find evidence to serve as the basis for standardisation decisions. The question of interest for the ASC during its consideration of results relative to the evidence presented is whether there is sufficient rational evidence to adjust the marks either upward or downward.

In instances where there are differences between the ASC's decisions and the proposals presented in any of the over 500 subjects, the assessment body concerned is allowed an opportunity to gather new evidence to present in motivation for a counter proposal. Should there be compelling reasons for the ASC to agree with the proposal of the assessment body without violating any of the principles of standardisation, the initial decision is altered. The opposite is also true: if there are no compelling reasons to agree with the proposal, the decision of the ASC is final. This is because the independence of Umalusi is sacrosanct.

In respect of the most recent sets of results, i.e. the November 2022 and June 2023 National Senior Certificate (NSC) examination, most of the subject results were accepted as presented by the respective assessment bodies (the DBE, DHET, IEB and SACAI). This provides evidence that, in recent years, there has been a high degree of agreement between Umalusi and the assessment bodies in terms of the direction of standardisation decisions. An emerging pattern in recent years is to us a sign of a maturing system.

At the heart of the foregoing quality assurance processes is the need to safeguard the integrity and credibility of all the results. Crucially important is that Umalusi's research has proven that the approach that we employ to standardise examination results is not out of sync with what is happening elsewhere in the world.

It is for that reason that the Minister of Basic Education, Ms Angie Motshekga, remarked as follows during her congratulatory message on the occasion of Umalusi' 20th anniversary: "What we know is that, to date, no research has been conducted to provide evidence that there is anything amiss about Umalusi's standardisation process."

In the words of one of the top professors in Mathematics, the work of the ASC aims "to prevent learners from being disadvantaged due to uncontrollable circumstances".

Similar sentiments have been echoed before by senior academics in the education faculties of the universities that I, together with some of Umalusi's senior managers, have had engagements with on the mandate of Umalusi with specific reference to the standardisation of results. The overall theme that emerged from those interactions is: "I now have a different perspective on Umalusi's standardisation

approach.” Many people that we have presented to on our work have had a ‘eureka’ moment an ‘aha-erlebnis’ experience; an experience that gives a sudden insight: the ‘now I see moment.’

Umalusi sees no value in entering into fruitless public debates with political commentators, high-level public servants or academics in respect of its standardisation decisions. That is because Umalusi remains firm in its understanding and commitment to the idea that the best interest of learners is served when they receive certification of their learning achievements that is credible, has integrity and enjoys the confidence of the citizens and social institutions of our country. That position has been cemented by the international benchmarking of the NSC report, which makes an overall finding that the NSC provides its holders with an internationally comparable level of education. The report is publicly available on the Umalusi website ([www.umalusi.org.za](http://www.umalusi.org.za)).

Umalusi has a vision of being a trusted authority in fostering high education standards in the general further education and training (GFET) sector. It is on that account that, at the heart of Umalusi’s quality assurance processes is the need to inculcate ‘trust’ in the people of South Africa and examination councils at the continental level. It is for this reason that Umalusi invites observers from various education stakeholders, including NATU, to its standardisation meetings: to ensure transparency.

I would like to conclude my talk by reinforcing two of the nine values and principles that are promoted by section 195(1) of the South African Constitution: the promotion of a high standard of professional ethics, and fostering transparency. The work

of Umalusi, including the standardisation of examination results, is guided by the following five ethical principles:

- a) Integrity: Being honest and strong about what you believe to be right.
- b) Impartiality: The ability to give a fair opinion; not biased.
- c) Professionalism: The skill and high standard of behaviour expected.
- d) Reliability: Being trusted or depended upon.
- e) Transparency: Being easy to understand.

While these are Umalusi’s ethical principles, I argue that they apply to each and every one of us as workers and leaders in our respective areas of work. Writing in the context of leadership and ethics, Ciulla (2004: ix) emphasises that “Leadership is not a person or position. It is a complex moral relationship between people, based on trust, obligations, commitment, emotion and a shared vision of the good.”

Once again, I would like to thank the leadership of NATU for creating space during this policy conference for Umalusi to participate. We deeply appreciate that. I have no doubt in my mind that, taken together with yesterday’s deliberations, today’s discussions will lead to the adoption of conference resolutions that will assist in the realisation of NATU’s “commitment to defending the rights of children – as well as safeguarding, adhering to and dedicating itself to working unselfishly for the right of teachers to teach; and ensuring that the classroom experience is pleasurable to both the learners and teachers”.

Yes, that is possible through the collective wisdom of the leadership and membership of NATU.

# The role of qualitative input reports during the standardisation of examination results

## What is qualitative input?

Qualitative input refers to the information gathered from assessment processes related to the final examination. It is gathered from external moderators' moderation of question papers, the standardisation of marking guidelines and the verification of marking reports, as well as chief markers' and internal moderators' marking reports. The qualitative input informs members of the Assessment Standardisation Committee (ASC) on possible factors, other than the competency of the candidates, that could have influenced the performance of students in the final examination.

The purpose of the standardisation of marks is to control the variability from one examination session to the next. Performance variability may occur due to the quality of marking, the standard of the question papers and the state of teaching and learning, for example during the period of the Covid-19 pandemic. These factors, apart from the students' ability and knowledge, may cause variability in the results from one examination session to the next. Standardisation decisions are informed by well thought out principles



## Dr Mary-Antoinette Dliwayo

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of standardisation, qualitative inputs and evidence-based reports presented by the assessment bodies. A pre-standardisation meeting precedes the standardisation meeting. During the pre-standardisation meeting, Umalusi discusses the possible standardisation decisions, while the assessment body and Umalusi discuss and agree on the standardisation results.

## Gathering and packaging qualitative inputs

Staff members of Umalusi prepare and present qualitative inputs during the pre-standardisation meetings. These inputs will inform the Committee of factors that may contribute to the variation in students' results from one examination cycle to the next. The qualitative inputs are sourced from the reports of external moderators for the moderation of the question paper, attendance of the marking guideline discussion and the verification of marking. The approval or rejection of a concession will also be part of the qualitative input.

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***The team at the standardisation of marking guidelines discussion meetings may come across questions that are outside the curriculum or have missing, incomplete or wrong information.***

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Information from the chief markers' and internal moderators' reports from the assessment body can form part of the qualitative input.

### **The rationale for qualitative input**

#### **Moderation of papers**

The external moderation or absence of this process can influence the quality of a question paper. The question paper is set by an examiner and is internally moderated by the assessment body. Should a question paper be externally moderated, it has a better chance of being without mistakes and/or missing information. Sometimes the curriculum of a subject is updated, which may influence the students' performance. There is no history of questions that could prepare the students for a change in the curriculum.

#### **Marking guidelines discussions**

The attendance of the external moderators at the marking guidelines discussion meetings may influence the marking process. The presence of the marking staff is taken into consideration. The examiner, internal moderator (setting), chief marker, internal moderator (marking) and markers can all make valuable inputs during the discussion meetings. The absence of one

of the members may later have a negative impact on the marking process. The team, as mentioned above, has individual and collective knowledge on the subject under discussion. The knowledge and experience of each member of the team can contribute to the successful finalisation of a marking guideline with correct answers, including all alternative answers.

The team at the standardisation of marking guidelines discussion meetings may come across questions that are outside the curriculum or have missing, incomplete or wrong information. The assessment body may request a marking concession to allow the question paper to count out of a lower number of marks. This may have an impact on the cognitive level that could cause the question paper to be difficult or easy. The adjustments and additions to the marking guidelines during the discussions must be justifiable and must not interfere with the cognitive level of the answers or responses required. The standard of the sample marking is reported on and is taken into consideration with the qualitative input.

The marking guidelines need to include all necessary correct alternative responses. The chief marker rates the learners' performance in each question and comments on the ease or difficulty of the question paper. Most importantly, the chief marker supplies information on the use of textbooks. If questions were taken from specific textbooks, students might struggle to answer questions if they had not used the same textbooks. The chief markers' motivation assists the ASC to decide whether the raw marks can be accepted, adjusted downwards or adjusted upwards.

#### **Verification of marking**

During the verification of marking, the external moderator samples 20 scripts from different centres, different provinces and





on different levels of performance. The external moderators evaluate the standard of marking and adherence to the marking guideline. They will determine shortcomings of specific markers and, if necessary, report to and discuss this with the chief marker. The external moderator will check and report on the correct transfer of marks to the cover page of the script and the mark sheet. They will report on the standard of internal moderation and the number of scripts moderated. The external moderator reports on the performance of candidates. This must coincide with the performance of the candidates at the standardisation meeting.

The chief marker's reports are used to provide evidence to inform the qualitative input. Aspects like the clarity of instructions, numbering of the questions, standard of the question paper, content, weighting and cognitive levels are contained in the reports. They also report on the marking guidelines, and whether the questions correlate with the numbering of the marking guidelines.

The reports of the internal marking moderators supply lesser, but still important information. This includes information on the consistency in the allocation of marks, the adherence to the marking guidelines, and

whether marks were accurately totalled and transferred. The internal moderators also evaluate marker performance.

### **Importance of qualitative inputs on standardisation decisions**

The information and recommendations gained from the reports advise the ASC on standardisation decisions. The qualitative input presented by Umalusi's staff members on the day of the pre-standardisation of results meeting adds value to the qualitative data.

To improve the qualitative inputs presented, Umalusi will ensure that the examiners' and moderators' reports do not include predictions about student performance or suggestions for standardisation (mark adjustments). Umalusi will always attempt to ensure that the qualitative input points to pertinent, substantive issues that might have a material effect on student performance and offer precise comment on whether the ASC can trust the raw scores that were captured.

# Umalusi engages policymakers and implementers on the imperative of stopping unregistered and unaccredited institutions from operating

**As a social institution, Umalusi has an obligation to protect the interests of every learner in general and further education and training (GFET).**

During a media briefing held on 16 January 2023, the CEO of Umalusi, Dr Mafu S Rakometsi, remarked: "I want to inform members of the public that Umalusi is seriously concerned about candidates who register to write examinations at unaccredited private centres. It is equally concerning that there are some unaccredited independent schools and private colleges that admit learners, fully aware that they are operating unlawfully." Dr Rakometsi went further to urge the public to visit the website [www.umalusi.org.za](http://www.umalusi.org.za) to verify if an independent school or a private college is accredited before deciding to register with it.



**Mr Biki Lepota**



**Ms Mary Malia**

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## Deepening the message

To get everybody to pull in the same direction, and as directed by the relevant section of its founding act, Umalusi – through its Evaluation and Accreditation (E&A) Unit – engaged policymakers and implementers from across the country on 18 August 2023 on the imperative of not allowing unregistered and unaccredited institutions to thrive at the expense of unsuspecting candidates in the GFET space.

The engagement was held in a hybrid mode; some participants attended in person, while others joined online. The specific stakeholders in attendance were the Department of Basic Education (DBE), the Provincial Education Departments (PEDs), the Independent Examinations Board (IEB) and the South African Comprehensive Assessment Institute (SACAI). Profile-wise, the meeting was attended by senior officials

of the stakeholder organisations, including directors from the relevant directorates of the DBE, the CEOs of the IEB and SACAI, provincial heads of the examinations and assessment, and registration directorates, and the chief and deputy chief education specialists.

### **At the heart of the engagement**

The overall message delivered by Dr Rakometsi in his opening remarks was that of a need to harmonise the different approaches used by different provinces in registering independent schools for teaching and learning purposes and their registration as examination centres. The different approaches impact on Umalusi's accreditation process, since this process is linked to the registration of a school.

Flowing from the opening remarks, the discussions were anchored on the importance of aligning the different approaches used by provincial education departments in registering independent schools and their accreditation by Umalusi. One may ask: Why is it necessary to have an institution registered and accredited? The registration of an independent school is required by law and is essential to ensure the school's accountability to stakeholders. The accreditation of a school attests to the quality of the curriculum provision at that school. The registration of the institution as an examination centre ensures the credibility and integrity of its examinations, which leads to the awarding of the qualification.

### **How does registration differ from accreditation?**

To lead a clear discussion, it is necessary to briefly differentiate between the concepts of 'registration' and 'accreditation'. The registration and accreditation of institutions

are two entirely distinct functions, aimed at achieving different, yet complementary goals. The registration of an institution is a prerequisite for institutional accreditation. In other words, Umalusi considers an institution for accreditation if such an institution is registered with the relevant authorities. On the other hand, accreditation signifies a status given to a registered institution to attest to its capacity to offer a qualification.

In their article titled "Umalusi's approach to the accreditation of independent schools offering online teaching and learning", published in the June 2023 edition of Makoya (pp.16–19), Lechaba and Naidoo delineate roles and responsibilities:

"The South African Schools Act requires independent schools to be registered with the relevant provincial education department. The NQF and GENFETQA Acts restrict Umalusi to accrediting independent schools that are registered in line with the South African Schools Act and offer a qualification on the General and Further Education and Training Qualifications Sub-framework (GFETQSF) of the NQF."

This statement clarifies two things. The first is that the PEDs perform the registration function, while Umalusi accredits institutions. Secondly, the statement implies that registration precedes accreditation.

### **Specific issues on the table**

As indicated in this article, the need for the engagement was ignited by the challenges that Umalusi encountered while interacting separately with the DBE, PEDs, independent schools and private assessment bodies. In an attempt to address the challenges, the programme was designed so that all the issues converged around the question: What gaps exist with the current processes, and how can the gaps be bridged?

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***The overall message delivered by Dr Rakometsi in his opening remarks was that of a need to harmonise the different approaches used by different provinces in registering independent schools for teaching and learning purposes and their registration as examination centres.***

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The first presentation set the scene by updating the workshop on the common issues that affect the independent schooling sector. It covered five broad areas:

- The legislative blockages to the offering of foreign qualifications on the GFETQSF,
- The reasons why there is currently no space for alternate curricula on the sub-framework,
- The lack of a legislative framework to enable Umalusi to accredit online schools,
- The clarification that since Umalusi deals with institutions and not individuals, it has no role to play in home education, and
- What to look out for to confirm the validity of an institution's accreditation certificate.

The scene-setting talk was followed by a presentation on what to consider before registering an independent school as an examination centre. The key message of the presentation was that, for an independent school to be considered as an examination centre, it must first be registered with the relevant PED as an independent school. It must then be accredited by Umalusi to

offer the qualification, and it must finally be registered with an assessment body as an examination centre.

The third presentation aimed to share with participants the common challenges that Umalusi experiences in considering accreditation applications from independent schools and how to address the challenges going forward. Thereafter, each of the three assessment bodies (the DBE, IEB and SACAI) presented the criteria used to register independent schools as examination centres. Additionally, the DBE explained the processes that must be used to register independent schools. The presentations made it clear that the criteria used by the assessment bodies are adequately robust to safeguard the overall credibility and integrity of the examinations conducted at such centres.

### **Designated examination centres**

Focusing on the notion of designated examination centres, one of the presentations compared and contrasted public and private assessment bodies' reasons for the establishment of designated examination centres. The presentation clarified that private assessment bodies establish designated centres to accommodate candidates who access Grade 12 via distance education providers and online schools. These institutional types are currently not accommodated in Umalusi's accreditation regime. In contrast, the PEDs establish designated examination centres to accommodate candidates already enrolled in unaccredited independent schools. Based on that, it would not be unreasonable to conclude that designated examination centres are used as an interim measure to enable candidates from institutions other than accredited independent schools to write Grade 12 examinations and subsequently be certified.



## The benefits of the engagement

The engagement was considered successful for at least four reasons.

Firstly, Umalusi, yet again, successfully convened senior officials from national and provincial education departments, encompassing examination and registration divisions, and representatives from private assessment bodies, in a single gathering to discuss matters of common interest.

Secondly, the participants agreed that the different criteria and approaches used for the registration of independent schools as sites of teaching and learning, on the one hand, and their registration as an examination centre, on the other, need to be standardised.

Thirdly, consensus was reached to enhance communication channels between the PEDs, Umalusi, the DBE and – most importantly – the provincial directorates. This effort aimed to facilitate the registration of independent schools as institutions of learning and their registration as examination centres for the administration of reputable examinations.

Finally, the discussions clarified the distinct roles and legislated areas of work of each party involved. This understanding is vital as it enables senior officials in the national and provincial education departments and private assessment bodies to provide clear guidelines to the public. With a unified communication approach, the parties could prevent the operation of illegal independent schools, and only administer examinations at independent schools accredited by Umalusi and registered as examination centres by the PEDs, SACAI or the IEB.

## The way forward

In drawing the engagement to a close, Dr Eva Sujee, Executive Manager of Umalusi's Quality Assurance and Monitoring Branch, suggested five key actions to the policymakers and implementers as the way forward.

She started by underscoring the importance of all stakeholders employing a standardised process to register an institution as an independent school, on the one hand, and registering the same institution as an examination centre, on the other.

Secondly, Dr Sujee encouraged the PEDs to use Umalusi's feedback on the independent schools' accreditation applications as a lever to support those schools that are in the process of accreditation. Additionally, she asserted that if any independent school offered Umalusi's qualifications and did not seek to be accredited, such a school should face the full might of the law.

The third key action was the acknowledgement by Dr Sujee that there was a need for a framework to regulate online schooling. She indicated that Umalusi was working collaboratively with the DBE to regulate the sector.

Finally, Dr Sujee called for streamlined discussions and aligned processes regarding registering independent schools across the PEDs. She expressed her gratitude for the productive discussions during the meeting. She highlighted the value of building strong stakeholder relationships among stakeholders for problem solving, particularly when dealing with issues of mutual interest. Dr Sujee urged the PEDs to share best practices among each other.

# Learning from the sector on how to integrate innovative technologies to enhance service offering to the public

**As a learning organisation, Umalusi encourages its employees to identify opportunities to enrich their knowledge in their areas of work. In this regard, three staff members from the Information and Communication Technology (ICT) Unit recently participated in the GovTech 2023 Conference, organised by the State Information Technology Agency (SITA), at the Durban International Convention Centre from 12 to 14 September 2023. The officials are Simon Maluleke (Senior Manager: ICT), Dexter Simelane (Manager: ICT Applications) and Victor Mathebula (Assistant Manager: ICT Infrastructure).**

GovTech is an ICT-focused conference in which stakeholders and representatives from the public and private sector, academics and civil society organisation come together to engage and exhibit the latest trends in technology. This year's conference was organised under the



**Mr Victor Mathebula**

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theme “Platform economy for digital transformation and inclusive growth”. The conference was officially opened by the Minister of Communication and Digital Technologies, the Honourable Mondli Gungubele. The premier of KwaZulu-Natal, Ms Nomusa Dube-Ncube, and the Executive Mayor of eThekweni, Mr Mxolisi Kaunda, welcomed the delegates to the province of KwaZulu-Natal. The Deputy Minister of Communication and Digital Technologies, the Honourable Philly Mapulane, was also in attendance. He addressed delegates on the need for robust cyber security for an effective digital transformation.

Various panel discussions were held to deliberate different topics, such as the importance of Artificial Intelligence (AI) and Big Data in digital transformation, and the role that legislation and regulation play in promoting the digital economy for the benefit of the public service, business and

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*The most common example of this effect is linking government services rendered to citizens to an individual's ID number issued by the Department of Home Affairs.*

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the citizen. Among other panel discussions was the need for the integration of systems among government departments and entities to simplify and improve processes, and to ensure efficient service delivery to the citizens of the country.

The most common example of this effect is linking government services rendered to citizens to an individual's ID number

issued by the Department of Home Affairs. Data security remains a concern in this call for integration. There is a need to ensure that proper governance is in place and is adhered to by all parties involved.

Umalusi's delegates had an opportunity to attend an exhibition of various technologies and to engage with experts within industry with respect to the implementation of solutions that may be beneficial to the organisation, to enhance business processes and to improve the services rendered to key stakeholders.

In conclusion, examining the various technologies exhibited at the conference and considering the evolving landscape of the ICT industry, Umalusi's ICT is well placed to integrate additional innovative technologies to improve the quality of the services it provides to the public.

## Umalusi hosts three African countries in nine months during study visits

**Umalusi is a destination from which peers on the African continent always yearn to learn. Between December 2022 and September 2023, Umalusi hosted three delegations from three different African countries.**



**Mr Sphiwe Mtshali**



**Ms Shirley Ledwaba**



On 15 December 2022, the Permanent Secretary for Primary and Secondary Education of Zimbabwe visited Umalusi on a study visit.



Delegates from Zimbabwe

Exactly three months later, on 15 March 2023, Umalusi hosted a delegate from the Ministry of Education in Angola.



Delegates from Angola



The third study visit to Umalusi took place on 14 September 2023. The Inspector-General of Education in the Ministry of Secondary Education in Cameroon, together with his delegation, engaged Umalusi's management.



Delegates from Cameroon

The third visit was occasioned by the fact that the Cameroon Ministry of Basic Education was in the process of setting up a permanent structure for the assessment of the learning achievements of its primary and secondary school pupils. Therefore, the Cameroonians wanted to understand the role of Umalusi in the delivery and assessment of national qualifications such as the National Senior Certificate (NSC).

In welcoming the Cameroonian delegation, the CEO of Umalusi, Dr Mafu S Rakometsi, said "[t]he uniqueness of today's engagement is that it marks the first study visit during Umalusi's first year in its journey of the next 30 years or the third decade of

education guardianship in South Africa". The CEO went on to say that visits such as this "give Umalusi invaluable opportunity to discuss issues of mutual interest and forge strong cooperation between South Africa and countries on the continent, something that will go a long way in the realisation of the ideals of Agenda 2063, the Africa We Want, which is characterised by, among others, unity, interconnectedness and interdependence".

The Public Relations and Communications Team appreciates opportunities such as these, as they help to deepen the existing relations with Umalusi's stakeholders on the continent.

# Umalusi to host the 40<sup>th</sup> AEAA Conference

Umalusi will host the 40th Annual Conference of the Association for Educational Assessment in Africa (AEAA) at the Century City Conference Centre and Hotel in Cape Town. The conference will be hosted from 19 to 23 August 2024 under the theme “Reimagining educational assessment in the age of multiple dimensions of learning in a global society”.

The AEAA conferences normally have a mix of delegates and speakers from countries with different histories and demographics (such as those from Africa, Australia, Europe and North America). This creates an invaluable opportunity to discuss and debate assessment-related issues.

Umalusi is excited about the AEAA descending on South Africa to bear witness to the organisation having passed its teen years since the 21<sup>st</sup> AEAA Conference was



**Mr Sphiwe Mtshali**



**Ms Rachel Masisi**

held in Cape Town from 25 to 27 August 2003. This was immediately after the birth of Umalusi.

Any queries relating to this conference can be sent to [aeaa2024@umalusi.org.za](mailto:aeaa2024@umalusi.org.za). Detailed information about the conference is available on Umalusi's website ([www.umalusi.org.za](http://www.umalusi.org.za)).



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