

**AN ASSESSMENT OF THE THUTONG PORTAL
RECOMMENDATIONS
IN THE
FEASIBILITY STUDY
ON AN
E-EDUCATION INITIATIVE IN SOUTH AFRICA**

A Report submitted to KPMG

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30 April 2008

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SUMMARY

This report is written on request for an independent assessment of the Thutong Portal recommendations as outlined in the *Feasibility Study on the e-Education Initiative* for the South Africa public schools and FET college sectors. These recommendations relate very specifically to the **resourcing requirements** for the Thutong Portal as an integral part of the proposed Curriculum and Content Development (CCD) Pillar of the e-Education Initiative.

The assessment is written from the perspective of the assessor as a practitioner involved in the ICTs-in-Education sector in South Africa and the rest of Africa over the past 10 years. The assessor has also been a passive participant in the Feasibility Study for a brief period, mainly as a stakeholder, when she was working at Mindset Network and when stakeholders were required to participate in the Feasibility Study consultative workshops.

The assessment considered a range of background documents related to the e-Education Initiative in general including a *Needs Analysis* conducted by KPMG, as well as the specific recommendations on Curriculum and Content Development (CCD) within which the Thutong Portal recommendations are integrated.

It also notes that the ICT sub-committee of HEDCOM has reportedly approved the recommendations in their current form.

In assessing the recommendations, the following questions were posed:

1. Are the recommendations sensible, logical and coherent?
2. Do the recommendations respond objectively to the resource needs of the Portal given its current and future role in the schooling and FET college system in South Africa?
3. Is there any evidence of explicit or implicit bias or preference in favour of any external service provider, whether in the long term or short term?

The report comments on the key recommendations in light of these questions.

It concludes on the positive note that on the whole, the recommendations are indeed sensible, logical and coherent and that they respond to the central role envisaged for the Portal in the schooling and FET college system. In general the assessment also found no evidence of bias, explicit or implicit towards preferred service providers with the exception of a specific reference to the DSTV education bouquet which may suggest bias towards Multichoice as a preferred service provider in the face of growing competition in the pay-TV sector. The assessment recognises that any potential biases would be circumvented by rigorous adherence to government procurement policies which would give due consideration to levels of expertise, experience and BBBEE compliance, inter alia.

The report proposes very minor adjustments to some of the recommendations and proposes the endorsement of the recommendations and their inclusion as an annexure to KPMG's value assessment of the Thutong Portal recommendations including its cost models.

1. INTRODUCTION

An independent assessment of the Thutong Portal recommendations in the Feasibility Study on an e-Education Initiative, was requested in the context of a need for an impartial view on the efficacy of the proposed recommendations. The intention was to check whether the system proposed was sufficiently rigorous, based on an informed perspective. This report focuses mainly on the recommendations related to the resource requirements of the Portal and does not consider matters related to the conceptual framework for the Portal itself.

2. ASSESSMENT APPROACH

The assessment approach considers the recommendations against the broader management model proposed for the e-Education Initiative. The following questions were posed to test the efficacy of the recommendations:

1. Are the recommendations sensible, logical and coherent?
2. Do the recommendations respond objectively to the resource needs of the Portal given its current and future role in the schooling and FET college system in South Africa?
3. Is there any evidence of explicit or implicit bias or preference in favour of any external service provider, whether in the long term or short term?

The rationale for questions 1 and 2 is that if the recommendations are indeed, logical and coherent and if they respond objectively to the resource needs of the Portal, they are not a reflection of the subjective interests of any one party. The key recommendations are considered below and comment is provided accordingly.

3. MANAGEMENT MODEL

The general model for managing the e-Education Initiative in general and the Portal in particular, is premised on a combination of a strong state-led management process and the effective contracting in of specialised skills by external service providers. The model also considers an approach which integrates existing functions of various directorates of the Department of Education (DoE) with the e-Education Initiative functions.

3.1 A Combined State-Outsource Model

The overall recommendation is for a dedicated Branch within the Department of Education at national, provincial and district levels that will assume management responsibility for the e-Education Initiative and which will employ a small staff that will manage different sub-divisions of the Initiative, referred to as Pillars.

For the Curriculum and Content Development (CCD) Pillar, a dedicated Chief Director is proposed which in turn will have oversight of a Thutong Director who in turn will oversee 10 Portal Development Co-ordinators (equivalent to Deputy Directors). The latter will also co-opt and manage Learning Space Managers and Critical Advisors. This structure is depicted in the figure below:

Figure 1: Thutong Portal Management Structure

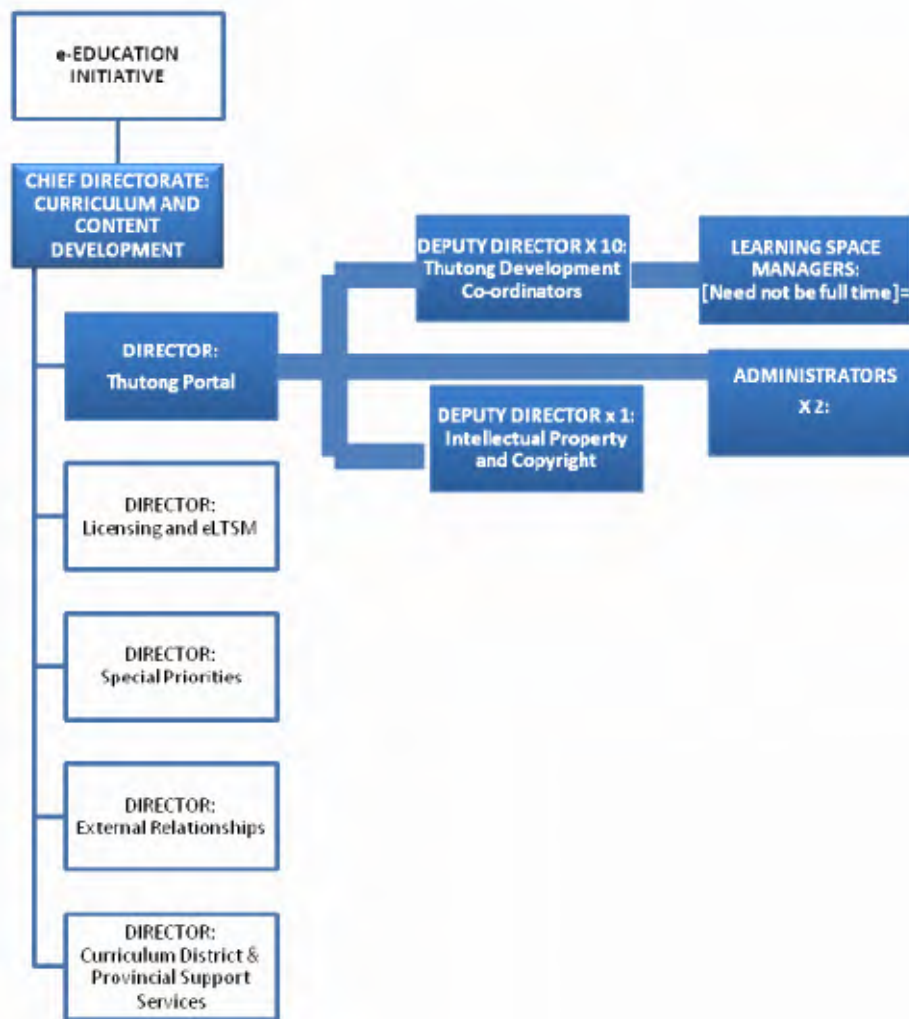


Figure 1 depicts the management structure for the Portal housed within the national DoE’s e-Education Directorate or Branch. At provincial levels, 1 unit head and 1 administrator is proposed for the CCD Pillar. At district level however, no additional support staff is proposed as this is Professional Development Pillar addresses the provision of PD credits and training as key in involving district officials in the curriculum integration strategy.

Roles and responsibilities are suggested for each level of directors at national level, including the Learning Space Managers. The latter are not considered to be full time staff but as responsibilities that can be assigned with existing Departmental functions.

The model also includes the active involvement of a host of different service providers at various levels in the system, with varying timeframes depending on the service required. These range from secondments of teachers with specified competencies to support content development to long term contracts with technical support providers for the design and maintenance of the Portal.

COMMENT:

1. That a structure internal to the DoE and not an semi-external, quasi-governmental parastatal to fulfil the function of managing the Initiative is recommended, suggests a commitment to strengthening government institutions in the delivery of this Initiative. This suggestion is raised in the context of a debate as to whether the e-Education Initiative should be managed by a quasi-governmental institution external to the DoE similar to the British Educational Communications and Technology Agency (BECTA) in the UK. Evidently the argument is in favour of an internally managed process for reasons clearly outlined in the document: that it would be too expensive and that with specific reference to the Portal, the functions are integral to the role of the DoE.
2. Evidently it is envisaged that the DoE would assume both the function of a delivery, implementation agent as well as an agency facilitating implementation and service provision with credible outsourced providers, in both the short and longer terms.
3. This approach accommodates both the need for stronger state-led institution and the skills constraints within the DoE that can be compensated by specialised skills of external providers.
4. The centrality given to the role of the district officials in the effective integration of ICTs within the curriculum by teachers and FET college lecturers is commendable as this approach has proven to be effective where they have been tried (such as with the Khanya Project in the Western Cape using local district level facilitators to promote higher levels of uptake of its ICT solutions by teachers and students in their schools). That this approach is also key to driving usage for the Portal represents a valuable and worthwhile investment towards an optimal-use strategy.
5. Whilst the roles and responsibilities are spelt out for Directors and Learning Space Managers, it is not as clear what the Critical Advisors are and what exactly their roles would be as opposed to Learning Space Managers.
6. That reason for suggesting 10 Portal Development Co-ordinators is not explicitly stated. It may well represent an educated guess of the number of Co-ordinators that may be needed at national level, given the tasks that have been spelled out for them.
7. The recommendation that long term outsourcing relationships be established with service providers as part of the overall management of the Portal seem logical because of the skill and capacity limitations that exist internally. There is no evidence that biases and preferred service providers are mentioned explicitly or implicitly that may warrant concern. It is understood that

the selection of such long term service providers would be subjected to a competitive tendering process and will be selected on the basis of the criteria that would consider inter alia, expertise, experience and BBBEE compliance.

3.2 An Integrated Approach

The recommendations specific to CCD Pillar also propose the integration of e-Education-related curriculum functions with existing directorates within the DoE. For example, that the e-Education Initiative collaborates with the existing GET Schools Directorate, the Social and School Enrichment Branch and School Curriculum Directorate.

COMMENT:

Whilst considering the management of an e-Education process as an important process that requires dedicated staff, it considers the mainstreaming of e-education within the existing structures and functions of the Department as a whole which differs fundamentally from the role of the Centre for Educational Technology as a separate and independent division within the DoE in 1995.

4. PORTAL HOSTING AND TECHNICAL DEVELOPMENT

4.1 SITA as Host

It is also recommended that the Portal be hosted within the State IT Agency (SITA) because it is a state-owned website and needs to be managed according to government security standards, hosting protocols and policies. This recommendation also takes due cognisance of the evolution of the Portal over time and the significant increase in the use of the Portal as ICT access becomes more ubiquitous in the education sector.

COMMENT:

This recommendation encourages inter-Departmental collaboration which remains a challenge and key consideration for government. Additionally, this addresses any concerns over the role of current external agencies involved in the hosting of the Portal website and hence limits the influence of such agencies in the future Thutong management process.

4.2 Technical Maintenance and Development

The recommendations spell out the services required to maintain the technological structures and tools of the Portal both currently and those emanating from e-Education Initiative requirements. It is also specifically proposed that contacts in the design and maintenance of the Portal be over a 3 to 5 year period to allow for technical continuity and relationship development with DoE staff. In an attempt to keep pace with technological changes, it is further proposed that the Portal undergoes a technical overhaul every 5 years.

COMMENT:

These recommendations are logical and consistent with general technical planning for education

portals of this kind. The recommendations are practical and forward-looking and evidently based on experience with the Portal over the past few years.

Again, with reference to the longer term relationships with external technical support providers, no explicit or implicit allusions are made to preferred providers.

5. CONTENT MANAGEMENT

The areas that content management will cover is clearly spelt out and includes both content development and acquisition of curriculum resources, supporting DoE officials in using the Portal and building communities of practice. Teachers with content knowledge and African language competencies would be seconded to the DoE and subject matter experts would be hired to support curriculum content development especially in priority learning areas. This process will also draw on expertise in professional materials development, instructional design and project management.

Each of these components are given detailed consideration including clarity on the role of Learning Space Managers. Again the evolution of Learning Spaces over time is considered as the digital curriculum content offering expands on a yearly basis and as users become more active on the Portal. A detailed year on year projection on the number of managed learning spaces and associated budget is provided over a 10 year period.

The aim to promote the widespread use of the Portal by all DoE officials at all levels, particularly as a channel of communication for their existing job functions, is explicitly stated with clear examples articulated on how this will be envisaged and an expectant uneven uptake of this process among districts, provinces and directorates.

COMMENT:

The integrationist approach is apparent with the role of the LSMs not necessarily as full time positions but that which can be integrated into existing roles, the expectant role of the Portal as communication channel integral to the role and function of all DoE officials across the board.

The inclusion of seconded educators not only encourages localised experience and expertise in the system but also promises greater contextual relevance of the digital content.

Given the significant challenge faced by teachers in delivering the new curriculum the emphasis on the development of curriculum resources is understandably paramount. However, a strategy that encourages greater usage of the Portal should also be cognisant of the need to allow for the development and exploration of non-curriculum or extra-curriculum digital resources as well.

Clarity on the role of the LSMs is valuable but as stated before, that of the Critical Advisors are not spelt out in this section however.

6. e-LTSM CREDITS

The Portal becomes an important conduit through which educators and college lecturers obtain e-LTSM Credits which represents a key incentive for their use of digital content. Cost estimates are provided for a range of e-LTSMs and cost comparisons with international examples are applied, particularly in the UK. .

COMMENT:

There appears to be much emphasis on the use of the DSTV education or full bouquets at a time when the prospect of more pay-TV channels who are obliged to include education content in their offering will be a fait accompli by the end of 2008 and that this is not considered in the estimations of the recommendations. This however could be construed as a bias in favour of DSTV and Multichoice.

7. TENDERS

The document provides details with budget for distinct tenders which are consistent with the resource recommendations proposed.

8. ASSESSMENT

Within the e-Education Initiative, it is evident that the Portal is envisaged as a central to its strategy both currently and over the next decade. The Portal is and will increasingly become:

- an integral communication mechanism for all DoE officials to fulfil their functions, at all levels (national, provincial and district) and throughout the Departmental hierarchy
- as a pivotal mechanism for accessing and uploading educational resources tool for and by teachers and FET college lecturers;
- as a critical support mechanism for the Continuing Professional and Teacher Development strategy of the DoE
- as a tool for supporting school managers in the implementation of the Advanced Certificate in Education for School Principals
- as a support mechanism for the school administration system particularly the rollout of the South African School Administration and Management System
- as mechanism for the development of communities of practice among learners, teachers and FET college lecturers and school managers

Evidently significant resources are required for the Portal to fulfil these and other functions optimally over the next decade. The recommendations for a strong state-led management model which includes the contracting in of external service providers at various levels and over varying periods of time; the integrationist approach of the recommendations in relation to existing curriculum and content development functions within the DoE; the active inclusion of educators from varying linguistic and

social contexts to support the development of contextually relevant digital content; the central role given to district officials in the promotion of uptake and use of the Portal, together suggest coherence and integrity in the articulation of the resource requirements for the Portal to fulfil its mammoth role.

That due consideration is given for consistent and continuous technical upgrade is not only logical but also very practical and forward-looking and is evidently premised on the experience with the Portal over the past few years.

The consistency of the recommendations is further evidenced by the articulation of clearly defined tenders with budgetary details to support the fulfilment of the recommendations.

Furthermore, no evidence of explicit biases in favour of any preferred service provider was evident in the recommendations in general, with the exception of the reference to the DSTV education bouquet which is owned by Multichoice, under the section dealing with e-LTSM Credits. That other service providers are already coming into play in the pay-TV sector with obligatory education content, is not considered.

It should however be recognised that any potential biases would be circumvented by rigorous adherence to government procurement policies which would give due consideration to levels of expertise, experience and BBBEE compliance, inter alia.

Finally, that the ICT sub-committee in HEDCOM has reportedly approved the recommendations in its current form, is further testimony to the efficacy of the recommendations.

8. PROPOSED AMENDMENTS

The following minor amendments are proposed:

1. The provision of more explicit clarity on the role and function of the Critical Advisors
2. Clarity on the reference to 10 Deputy Directors to serve as Portal Development Co-ordinators, even if this is a guesstimate.
3. Either the removal of Multichoice's DSTV education or full bouquet or the explicit mention of other potential pay-TV contenders in the education space such as Telkom Media and One Digital Media. Perhaps the latter is advisable and price estimates for these are already available.

9. CONCLUSIONS

With the view that the recommendations are coherent and unbiased in general, it is proposed that KPMG incorporates this report as an annexure to its existing value assessment of the Portal recommendations, including the cost model.