

BUSINESS PLAN

Open Learning System for Post-School Education and Training

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1. Summary Project Description

Name of Implementing Agency:	Department of Higher Education and Training
Project Name:	Open Learning System for Post-School Education and Training
BAS Project Fund Code:	716679
Implementation Period of the Project:	1 April 2014 – 31 March 2021 (as per the no-cost extension requested in August 2018)
CFO:	Mr Theuns Tredoux
Contact Number:	012 312 5079
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Total Project Amount Awarded:	R51 860 400

2. Executive Summary

2.1 Preamble

This business plan is an update (requested by National Treasury) of the approved Business Plan (no-cost extension) signed by the Director-General: Department of Higher Education and Training (DHET) on 28 August 2018 and submitted to National Treasury.

Delays were experienced due to the late appointment of project staff. The bulk of activities have kicked-off during the 2017-18 financial year and are projected to be completed in 2020-21.

On recommendation from National Treasury, an alignment exercise between open learning projects, parts of this business plan have been updated to take into account, the delay in implementation and duplication between projects.

2.2 Open Learning as a National Priority – Rationale for the Project

One of the obligations of the DHET is to increase access to educational opportunities for young people that are not in employment or education and training (NEET) and those who experience barriers to learning. Such barriers would include geographical isolation, discrimination on the basis of race, gender, age, or physical disability, financial abilities, the inability to take time off work for a course, lack of 'appropriate' qualifications, and the use of pedagogical approaches that restrict accessibility to learning.

A possible strategy that can be used by the DHET to increase access to educational opportunities is the implementation of open learning in an organised, articulated, structured and systematic manner within a Virtual Learning Environment (VLE). It will include free access to education and training opportunities for all and in specific free access to quality teaching and learning materials.

In Chapter 7 of the *White Paper for Post-School Education and Training* (2014) the DHET commits to working toward creating a post-school education and training (PSET) landscape based on open learning principles.

An *Implementation Strategy for Open Learning in Post-School Education and Training* was approved by the Deputy Director-General: Human Resources Development, Planning and Monitoring Coordination on 18 March 2016. The strategy identifies 10 outcomes with related activities. Emanating from the strategy, an implementation plan for the strategy has been developed that provides the context for open learning in PSET.

Since 2010/11, the Strategic Plan of the DHET supported the development of open learning opportunities as part of the PSET system. There is an intention to connect education institutions and curricula to emerging networks and information resources, to promote innovation and opportunities for lifelong learning and to the institutionalisation of open learning initiatives.

The DHET has developed a draft *Open Learning Policy Framework for Post-School Education and Training* in support of diversity of provision based on open learning principles as a strategic enabler to improve learning opportunities across the PSET system.

The DHET is conducting activities in order to support, coordinate and guide the development and provision of open learning in the PSET system under the umbrella term **National Open Learning System (NOLS)**. This is an attempt to provide a vision for the future delivery of open learning in the PSET system that are sustainable and meet the needs of a wide range of learners from the community education and training (CET) sector, technical and vocational education and training (TVET) sector, university education (UE) sector and also youth who are NEET. It will furthermore create an enabling environment for job creation in the development, management and implementation of an open learning system for PSET.

Through this **Open Learning System** project, capacity will be developed and jobs could be created in developing, managing, maintaining and sustaining open learning with multiple components such as materials development and content management, learning management, assessment and certification.

This **Open Learning System** project is working in parallel with the Teaching and Learning Development Support Programme, Sub-Project 2: *Capacity Building for TVET College Lecturers through Open Learning* as well as the European Technical Assistance Projects viz.: *Technical Assistance to capacitate DHET staff in open learning (OL4TL)* and *Technical Assistance to conduct Introductory and Provincial Open Learning Workshops for TVET and CET Colleges* all towards achieving the directives from the White Paper and the outcomes of the *Implementation strategy for Open Learning on Post-School Education and Training*.

2.3 Brief description of the Programme and its Elements

This updated Business Plan followed the conceptualisation of open learning in the DHET in 2013/4.

This project aims to initialise the development of the NOLS for South Africa. The NOLS consists of:

- PSET legislative and policy environment conducive to open learning;
- Implementation of open learning approaches in PSET institutions;
- Learning/Content Management System (L/CMS) providing access to high quality teaching and learning materials and learning opportunities;
- Quality teaching and learning materials developed by the DHET and made available as Open Educational Resources (OER); and
- Development of a national model for materials development.

This **Open Learning System** project has already seen the initiation of the development of a NOLS for PSET. This include:

- The development of the concept of Open Learning in PSET;
- The development of the user story and user requirements for the L/CMS (Information Technology System);
- The commencement of the development of quality open learning materials in 3 identified programmes (out of the 4 planned programmes);
- The development of institutional capacity (DHET and institutional personnel) to deliver programmes/courses in the proposed programme area (ongoing activities);

- The development of the conceptual framework including the methodology and publication of the envisaged case studies; and
- The promotion of the use of OER.

The primary elements of the **Open Learning System** Project are:

- Development of a National L/CMS including materials development in the 4 programme areas identified, and the development of institutional capacity to deliver courses in the proposed programme areas. Integral to this outcome is the development of high quality learning materials that will be published as OER to be made available via the L/CMS; and
- Coordination and promotion of the use of OER in PSET.

During the alignment process the other element from the original business plan has been moved to the *Capacity Building for TVET College Lecturers through Open Learning* sub-project, viz.:

- Implementation, collection and publication of case studies and promote on the application of open learning in post schooling that can be shared amongst institutions and countries.

(Annex 5)

2.4 Role players

While the DHET will take the lead in the development of the NOLS, universities, TVET colleges, skills development providers and CET colleges will play major roles in the implementation of open learning. The DHET entities such as the Sector Education and Training Authorities (SETAs), Quality Councils (QCs), and the South African Qualifications Authority (SAQA) as well as other Departments such as the Department of Basic Education (DBE) will also play major roles as they are already working with the DHET in conceptualising open learning. These role players are critical in providing an integrated system of open learning in the country.

The primary beneficiaries of the services in the country will be all lifelong learners of all ages that will have access to more learning opportunities. Secondary beneficiaries will be practising college lecturers; newly skilled and employed open learning content developers; learning managers; learning support personnel as well as young researchers.

2.5 Cost

The cost of developing a National L/CMS, developing materials in the 4 programme areas identified, developing institutional capacity to deliver courses in the proposed programme areas and coordinating and promoting on the use of OER in PSET is R51 860 400.

2.6 Timing implications

As outlined in the approved Business Plan (no-cost extension) signed by the Director-General on 28 August 2018 and submitted to National Treasury, the timeframe for the project is 1 April 2014 – 31 March 2021.

3. National Open Learning System for Post-School Education and Training

3.1 Contextual Framework (linked to the rationale of the project (3.3))

This updated Business Plan followed the conceptualisation of open learning in the DHET in 2013/4.

The Delivery Agreement and Outcome 5, that the Minister of Higher Education and Training signed with the President initially in 2010, namely the development of a “skilled and capable workforce to support an inclusive growth path”, together with the associated outputs 5.2 (dealing with Increase access to programmes leading to intermediate and high level learning) and 5.3 (dealing with Increase access to occupationally-directed programmes in needed areas and thereby expand the availability of intermediate level skills (with a special focus on artisan skills)) mandated the Minister of Higher Education and Training to increase access to quality learning and teaching programmes in the PSET sector. It has implications for Outcome 4: Decent employment through inclusive economic growth.

In Chapter 7 of the *White Paper for Post-School Education and Training* (2014) the DHET commits to working toward creating a PSET landscape based on open learning principles. This includes the following:

- A network of providers and learning support centres
- Professional development;
- Quality assurance;
- Equitable access to appropriate technology;
- Collaborative development of quality learning resources published as OER; and
- Cross-border distance education.

An *Implementation Strategy for Open Learning in Post-School Education and Training* was approved by the Deputy Director-General: Human Resources Development, Planning and Monitoring Coordination on 18 March 2016. The strategy identifies 10 outcomes with related activities.

These are:

1. Developing a policy framework for open learning in PSET;
2. Formulating and implementing an Open Learning Advocacy Strategy;
3. Developing an integrated information structure for open learning;
4. Developing the NOLS for PSET;
5. Developing open learning courses/programmes;
6. Collecting case studies on the application of open learning in PSET that can be shared amongst countries;
7. Coordinating and promoting the use of OER in PSET;
8. Supporting an institutional network to take forward open learning;
9. Developing a model of distributed learning; and
10. Organising a network of technology enabled centres and providers.

Emanating from the strategy, an implementation plan for the strategy has been developed that provides the context for open learning in the PSET.

Since 2010/1, the Strategic Plan of the DHET supported the development of open learning opportunities as part of the PSET system. There is an intention to connect education institutions and curricula to emerging networks and information resources, to promote innovation and opportunities for lifelong learning and to the institutionalisation of open learning initiatives.

In 2013 the DHET conducted extensive consultation within and outside the PSET system, five programme areas were identified for implementation of open learning (planning towards wide scale implementation). These are:

- Skills programmes in the implementation of the National Infrastructure Plan;
- The development of programmes for the National Senior Certificate for Adults (NASCA);
- TVET college subjects that are not widely offered at TVET Colleges, e.g. Physical Science;
- University programmes to increase access to higher education; and
- Career Development Practitioners' programmes for out-of-school youth to assist in Career Development Centres/walk-in centres/high schools.

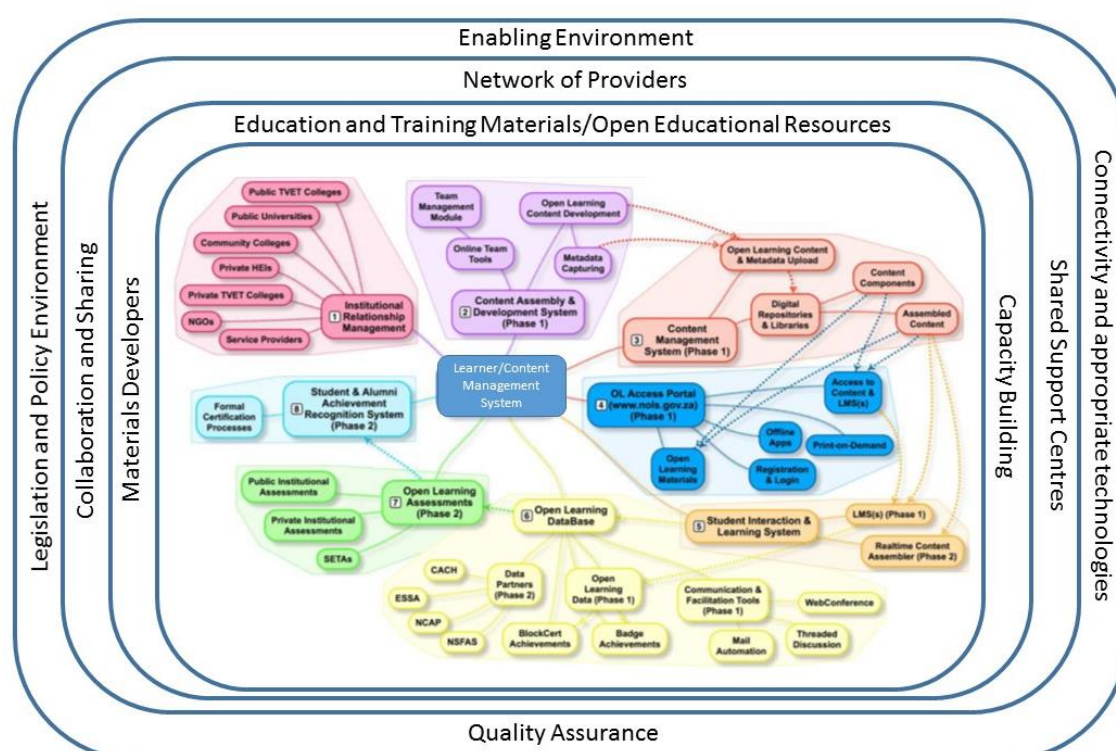
The DHET has developed an open learning conceptual framework and policy implications for government in preparation of this project. These include the following:

- Identify the key characteristics of a NOLS;
- Develop a planning framework, including critical guiding questions for the introduction of programmes within an open learning system for PSET in South Africa;
- Identify key role-players in each of the 5 proposed programme areas above and consult on the application and implementation of open learning; and
- Compile the conceptual framework, user specifications and policy implications for government, and specific for the DHET.

The DHET has furthermore developed a draft *Open Learning Policy Framework for Post-School Education and Training* in support of diversity of provision based on open learning principles as a strategic enabler to improve learning opportunities across the PSET system. It was widely consulted, subjected to a Socio-Economic Impact Assessment (SEIAS), and presented to the Social, Protection, Community, and Human Development (SPCHD) Cluster before approved by Cabinet for public comments. It was published on 7 April 2017.

Within the above context, the DHET is conducting activities in order to support, coordinate and guide the development and provision of open learning in the PSET system under the umbrella term NOLS. This is an attempt to provide a vision for the future delivery of open learning in the PSET system that are sustainable and meet the needs of a wide range of learners from the CET sector, TVET sector, university education sector and also youth who are NEET. It will furthermore create an enabling environment for job creation in the development, management and implementation of an open learning system for PSET.

The following diagram attempts to outline the scope of the NOLS:



This **Open Learning System** Project aims to complement and contribute to the development of a NOLS for South Africa. As illustrated in the diagram above, the NOLS consists of:

- PSET legislative and policy environment (incl. quality assurance) conducive to open learning;
- Connectivity and appropriate technologies;
- Implementation of open learning approaches in PSET institutions (incl. a network of providers and shared support centres);
- Quality teaching and learning materials developed by the DHET and made available as OER;
- Development of a national model for materials development; and
- An L/CMS providing access to high quality teaching and learning materials and learning opportunities.

Although this project is the first project within the NOLS initiative, it does not cover all the areas above.

This **Open Learning System** Project is working in parallel with the other Open Learning European Union-funded project, viz. the Teaching and Learning Development Support Programme, Sub-Project 2: *Capacity Building for TVET College Lecturers through Open Learning* as well as the European Technical Assistance (TA) Projects viz.: *TA to capacitate DHET staff in open learning* and *TA to conduct Introductory and Provincial Open Learning Workshops for TVET and CET Colleges* all towards achieving the directives from the White Paper and the outcomes of the *Implementation strategy for Open Learning on Post-School Education and Training*.

In order to align activities of the 2 projects and 2 TAs, an alignment exercise was done to fill gaps and to remove duplication (**Appendix 5**). The two projects' Business Plans were subsequently reworked.

3.2 Project Description

At this stage of the conceptualisation and development of open learning in the DHET, an initial phase of implementation is implemented through this **Open Learning System** project in order to initiate the development of a NOLS for PSET. The purpose of this **Open Learning System** project is therefore to initiate the development of a NOLS for PSET.

Emanating from the alignment exercise, the primary elements of the **Open Learning System** Project are:

- Development of a National L/CMS;
- Materials development in the 4 programme areas identified and the development of institutional capacity to deliver courses in the proposed programme areas. Integral to this outcome is the development of high quality learning materials that will be published as OER to be made available via the L/CMS; and
- Capacity building and promotion of the use of OER in PSET.

The 4th element from the original business plan viz. 'the implementation, collection and publication of case studies and promote on the application of open learning in PSET that can be shared amongst institutions and countries' has been moved to the *Capacity Building for TVET College Lecturers through Open Learning* sub-project (duplication).

The **Open Learning System** Project has identified 4 of the proposed programme areas for materials development in consultation with the relevant branches. These include:

- Skills Programme: Occupational Certificate: Electrician (SAQA Qual ID 91761);
- NASCA: The five subjects that have been identified for development are Mathematics, Quantitative Literacy, Natural Sciences, English and Economic and Management Sciences;
- Two NC(V) subjects: Mathematics and Physical Science; and
- Career Development Practitioners' programme: Occupational Certificate: Career Development Information Officer (SAQA Qual ID: 96372).

As outlined in the Executive Summary, this **Open Learning System** project has already seen the initiation of the development of the NOLS for PSET. This include:

- The development of the concept of Open Learning in PSET;
- The development of the user story and user requirements for the L/CMS (Information Technology System);
- The commencement of the development of quality open learning materials in 3 programmes (out of the 4 planned programmes);
- The commencement of the development of institutional capacity (DHET and institutional personnel) to deliver programmes/courses in the proposed programme area (ongoing activities);
- The development of the conceptual framework including the methodology and publication of the envisaged case studies (transferred to the *Capacity Building for TVET College Lecturers through Open Learning* project); and

- The promotion of the use of Open Educational resources (OER).

The project role players are:

- The DHET:
 - Directorate: Open Learning (Implementing division);
 - UE branch;
 - TVET colleges branch;
 - CET colleges branch;
 - Skills branch;
 - Directorate: Development Support in the Chief Financial Officer's (CFO's) branch;
 - Directorate: Finance in the CFO's branch;
- TVET colleges and Centres of Specialisation (CoS):
 - Management;
 - eLearning Managers;
 - Lecturers;
 - Students;
- CET colleges:
 - Management;
 - Lecturers;
 - Students;
- Skills development providers;
- SAQA and the relevant QCs; and
- SETAs.

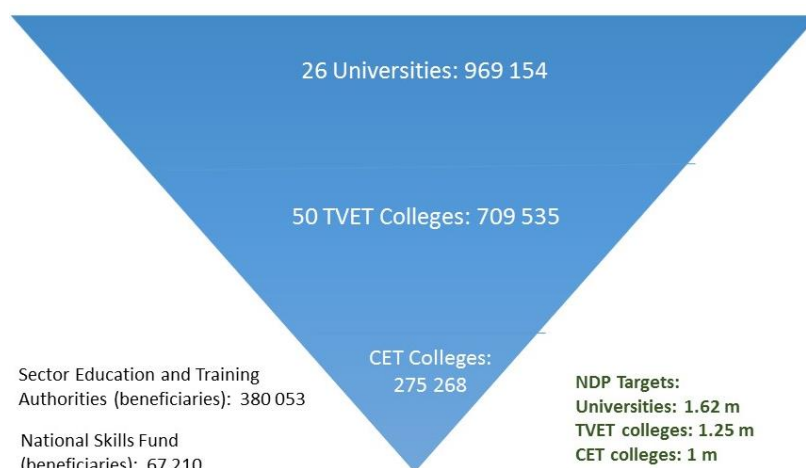
The accountable department is the DHET and the lead division within the DHET is the Directorate: Open Learning within the Policy, Planning and Strategy Branch.

Other partners are universities, the South African Institute for Distance Education (SAIDE), the Commonwealth of Learning (COL), Publishing Association of South Africa (PASA), Departments of Trade and Industry (DTI), Science and Technology (DST) and DBE.

The primary beneficiaries of the services in the country will be all lifelong learners of all ages that will have access to more learning opportunities. Secondary beneficiaries will be practising college lecturers; newly skilled and employed open learning content developers; learning managers; learning support personnel as well as young researchers.

3.3 Rationale and Objectives

According to the White Paper (2014) the current size and shape of the PSET system has to expand to accommodate the National Development Plan (NDP) targets as outlined in the following diagram:



In order to expand as targeted in the 2030 targets of the NDP, the PSET system has to expand its reach and approaches to teaching and learning to reach these targets. Open learning, when applied in a systematic and planned manner, can address the threefold challenges of the expansion viz. increased access, maintain or increase quality and cost-effectiveness.

Emanating from the Contextual Framework (paragraph 3.1) that laid the foundation for the rationale for the **Open Learning System** Project, this project forms an integral part of the DHET's activities to build understanding, develop models, support, coordinate and guide the development and provision of open learning in the PSET system (under the term NOLS). Open learning is by definition a new teaching and learning approach "which combines the principles of learner centredness, lifelong learning, flexibility of learning provision, the removal of barriers to access learning, the recognition for credit of prior learning experience, the provision of learner support, the construction of learning programmes in the expectation that learners can succeed, and the maintenance of rigorous quality assurance over the design of learning materials and support systems".

The envisaged impact of open learning in PSET is "A South Africa in which we have a **differentiated** and **fully-inclusive** post-school education and training system that allows South Africans to **access** relevant, quality post-school education and training, in order to fulfil the economic and social goals of participation in an inclusive economy and society".

Open learning therefore aims to steer the PSET sector towards making increasing use of diverse, cost-effective approaches to teaching and learning in the interests of increased access (translating into increased enrolments) and increased success (translating into improved throughput, success rates and employability), without sacrificing quality of teaching and learning (goal).

This **Open Learning System** project will therefore assist the DHET in achieving this goal and build the understanding open learning and how to apply it in the PSET system.

The open learning objectives that the **Open Learning System** project will contribute to (sphere of influence) are:

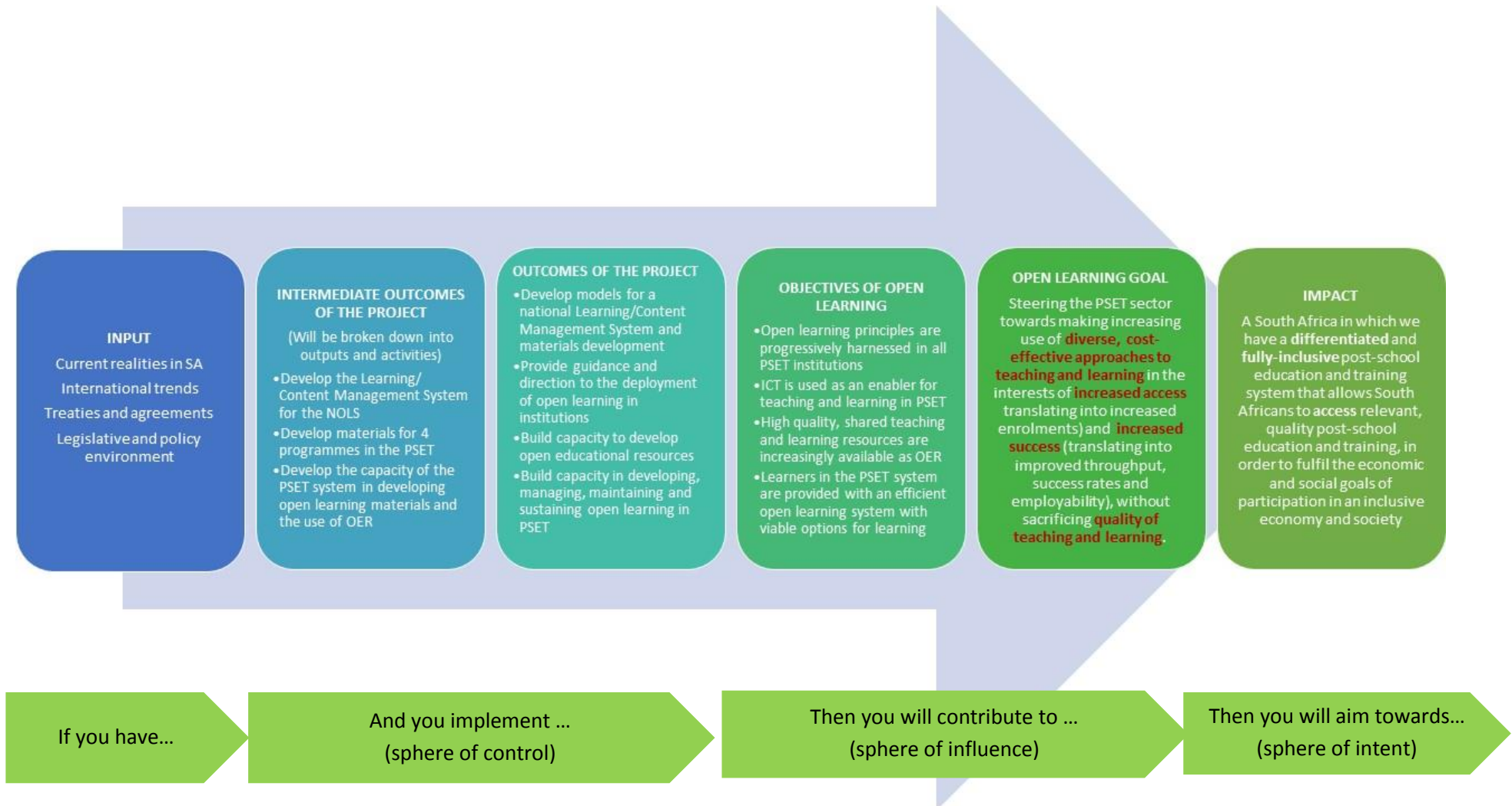
- Open learning principles are progressively harnessed in PSET institutions;
- Information and Communication Technology (ICT) is used as an enabler for teaching and learning in PSET;
- High quality, shared teaching and learning resources are increasingly available as OER; and
- Students in the PSET system are provided with an efficient open learning system with viable options for learning.

The outcomes of the project include:

- Develop models for a national Learning/Content Management System and materials development
- Provide guidance and direction to the deployment of open learning in institutions
- Build capacity to develop open educational resources; and
- Build capacity in developing, managing, maintaining and sustaining open learning in PSET.

In the planning of the project, the Theory of Change was developed. The Theory of Change provides a comprehensive description and illustration of how and why the desired change is expected to happen in the PSET context. It provides the logic between what the **Open Learning System** project does (its activities and outputs – discussed in the next section) and how these lead to desired goals and objectives being achieved – discussed in section 3.3. It identifies the vision/impact statement, the desired long-term goals and then works back from these to identify the objectives to aspire to and the outcomes of the project. These are all mapped out in detail in the Results Framework (see **Appendix 1**).

The Theory of Change applied for the **Open Learning System** project has been summarised in the following diagram:



3.4 Project Specifications

3.4.1 Outcomes

Emanating from the Theory of Change, the **Open Learning System** project's outcomes are to:

- Develop models for a national L/CMS and materials development;
- Provide guidance and direction to the deployment of open learning in institutions;
- Build capacity to use and develop OER; and
- build capacity in developing, managing, maintaining and sustaining open learning in PSET.

The outputs associated with the **Open Learning System** project are:

- Develop the L/CMS for the NOLS;
- Develop materials for 4 programmes in the PSET; and
- Develop the capacity of the PSET system in developing open learning materials and the use of OER.

3.4.2 Components of the Open Learning System Project

The logic of each component is captured in the following:

- Through the **Open Learning System** project, the L/CMS will be developed (Component A). The L/CMS development will result in a robust and contextualised technology platform not only for all further components to be built upon, but also to provide a national platform for further development and distribution of quality .
- In Component B two type of materials will be developed and made available on the L/CMS. Firstly, learning and teaching support materials (LTSM) will be developed in priority programmes of the DHET as well as where relevant, individualised self-directed learning materials for individual learning. These materials development outcome will not only produce materials that will be made available as individualised learning opportunities on the LMS, but also as LTSM on the CMS. Different models of development will be tested and result in the development of a preferred model for materials development by the DHET. The materials will also provide institutions and lecturers with opportunities to adopt, adapt, and customise the LTSM for their own use and purpose because of the materials being published as OER. Individual learners will be provided with learning opportunities on the LMS for self-directed learning. This learning can then be acknowledged and recognised (recognition of prior learning (RPL)) so that they can work towards obtaining a recognised and accredited qualification at a registered institution. These learning opportunities are learner-centred and will adhere to the principles of open learning.
- Component C sees that:
 - the DHET and institutions are provided with guidance and direction in the deployment of open learning;
 - capacity is built within a cadre of lecturers and other content specialists to develop open educational resources; and
 - capacity is built in the DHET and institutions in developing, managing, maintaining and sustaining open learning in PSET.

Therefore in Component C which is running alongside Components A and B, capacity is been built within Components A and B in areas such as 1) model building for systems; 2) materials development; 3) content management; and 4) learning management, assessment and certification in an open learning environment. Furthermore capacity will also be built in institutions and projects to use OER content (available on the CMS).

It must be noted that components will be implemented in parallel and all components will be finished in more or less the same time.

Furthermore, this project as a whole is working in parallel with the Teaching and Learning Development Support Programme, Sub-Project 2: OL4TL as well as the European Technical Assistance Projects to work towards achieving the open learning objectives.

The **Open Learning System** project's three main components broken down into activities, milestones and key performance indicators are:

a. **Component A: Development of an open learning L/CMS for PSET**

Intermediate Outcome:

Develop the L/CMS for the NOLS.

Outputs are:

1. A model for a national L/CMS developed;
2. An open learning L/CMS is developed;
3. Materials are uploaded to the L/CMS; and
4. A maintenance and sustainability plan is developed for the L/CMS.

The key performance indicators, main activities and milestones are summarised in the following table:

Activities	Key Performance Indicators	Milestones	Due Date
1. Develop a model for a national L/CMS	<ul style="list-style-type: none"> A document describing the model for the L/MS is approved by the DG 	Model for L/CMS	March 2020
2. ¹ Develop the user story and user requirements specifications for the national L/CMS	<ul style="list-style-type: none"> The user story and user requirements specifications are approved by the CD:PS 	L/CMS in operation	March 2019
3. ² Develop Business Process Diagrams (BPDs) for the national L/CMS	<ul style="list-style-type: none"> BPDs are developed and approved by the CD:PS 		April 2019
4. Product development and testing	<ul style="list-style-type: none"> L/CMS is developed and tested and all development and process documents are signed off by the CD:PS 		April 2020
5. Handover of product by SITA	<ul style="list-style-type: none"> The contract with SITA is concluded and final invoice signed 		Sept 2020

¹ Activities shaded in grey have already been completed

² Activities shaded in peach are in progress and progress reports are available

Activities	Key Performance Indicators	Milestones	Due Date
6. Materials that were developed in Component B are uploaded to the L/CMS	<ul style="list-style-type: none"> Materials are accessible on the L/CMS 	Materials are available on the L/CMS	March 2021

b. Component B: Development of materials for 4 programmes in the PSET

Intermediate Outcome:

Materials are developed for 4 programmes (identified by the DHET) in the PSET.

Outputs are:

- Materials are developed for the National Occupational Certificate: Electrician;
- Materials are developed for the National Senior Certificate for Adults (NASCA);
- Materials are developed for two subjects of the National Certificate (Vocational) (NC(V));
- Materials are developed for the Occupational Certificate: Career Development Information Officer; and
- A preferred model for the development of materials is developed.

The key performance indicators, main activities and milestones are summarised in the following table:

Activities	Key Performance Indicators	Milestones	Due Date
1. Develop materials for the National Occupational Certificate: Electrician that includes:			
a. Seek approval from the relevant branch to develop specific materials	<ul style="list-style-type: none"> Subjects/courses approved by DDG:T 		Nov 2016
b. Develop two sets of Terms of Reference (TOR) for Service Providers to develop the materials	<ul style="list-style-type: none"> Two tenders published 		Aug 2017 Sept 2018
c. Appoint Service Providers to assist in the development of the materials	<ul style="list-style-type: none"> Service Providers contracted 		Sept 2017 May 2019
d. Materials are developed	<ul style="list-style-type: none"> Progress reports received from Service Providers Materials signed off by the CD:PS 		Jan 2021
e. Materials are uploaded to the L/CMS (depending on the model of development and presentation agreed on)	<ul style="list-style-type: none"> Materials accessible through the L/CMS 	Materials are available on the L/CMS	March 2021
f. The model used in the development is documented	<ul style="list-style-type: none"> Model document signed off by the CD:PS 	Model documented	March 2021
2. Develop materials for the NASCA that includes:			

Activities	Key Performance Indicators	Milestones	Due Date
a. Seek approval from the relevant branch to develop specific materials	• Subjects/courses approved by DDG:C	Materials are available on the L/CMS	Nov 2016
b. Develop TOR for Service Providers to develop the materials	• Two tenders published		July 2017
c. Appoint a Service Provider to assist in the development of the materials	• Service Provider contracted		Nov 2017
d. Materials are developed	• Progress reports received from Service Providers • Materials signed off by the CD:PS		April 2020
e. Materials are uploaded to the L/CMS (depending on the model of development and presentation agreed on)	• Materials accessible through the L/CMS		March 2021
f. The model used in the development is documented	• Model document signed off by the CD:PS	Model documented	March 2021
3. Develop materials for two subjects of the NC(V) that includes:		Materials are available on the L/CMS	
a. Seek approval from the relevant branch to develop specific materials	• Subjects/courses approved by DDG:T		Nov 2016
b. Develop Terms of Reference (TOR) for Service Providers to develop the materials	• Tender published		Dec 2018
c. Appoint a Service Providers to assist in the development of the materials	• Service Provider contracted		May 2019
d. Materials are developed	• Progress reports received from Service Providers • Materials signed off by the CD:PS		Dec 2020
e. Materials are uploaded to the L/CMS (depending on the model of development and presentation agreed on)	• Materials accessible through the L/CMS		March 2021
f. The model used in the development is documented	• Model document signed off by the CD:PS	Model documented	March 2021
4. Develop materials for the Occupational Certificate: Career Development Information Officer that includes:			

Activities	Key Performance Indicators	Milestones	Due Date
a. Seek approval from the relevant branch to develop specific materials	• Subjects/courses approved by DDG:P		Nov 2016
b. Develop Terms of Reference (TOR) for Service Providers to develop the materials	• Tender published		May 2019
c. Appoint a Service Providers to assist in the development of the materials	• Service Provider contracted		Sept 2019
d. Materials are developed	• Progress reports received from Service Providers • Materials signed off by the CD:PS		Dec 2020
e. Materials are uploaded to the L/CMS (deepening on the model of development and presentation agreed on)	• Materials accessible through the L/CMS	Materials are available on the L/CMS	March 2021
f. The model used in the development is documented	• Model document signed off by the CD:PS	Model documented	March 2021
5. Develop a preferred model for the development of materials that includes:			
a. Analyse different models developed throughout this project as well as through the OL4TL sub-project	• Report with recommendations on the development of a model for materials development for the DHET	Report signed off by the CD:PS	March 2021
b. Consider the recommendations from the analysis and develop a preferred model for materials development for the DHET	• Model document approved by the DG	Preferred model for materials development in the DHET adopted	March 2021

c. Component C: Development of capacity of the PSET system in developing open learning materials and promoting the use of OER³

As Component C is an ongoing activity throughout the span of the project its key performance indicators are captured in a 'Capacity Development Grid' and includes:

- The DHET is provided with guidance and direction in the deployment of open learning;
- Institutions are provided with guidance and direction in the deployment of OER;
- Capacity is built within a cadre of lecturers to develop OER;
- Capacity is built within a cadre of other content specialists to develop OER;

³ These activities are shared between the OL4TL and the two Open Learning Technical Assistance projects

- Capacity is built in the DHET in developing, managing, maintaining and sustaining open learning in PSET;
- Capacity is built in institutions in developing, managing, maintaining and sustaining open learning in PSET;
- Capacity is built in the DHET in model building for open learning systems;
- Capacity is built in the DHET in content management;
- Capacity is built in the DHET in learning management, assessment and certification in an open learning environments;
- Capacity is built in institutions and projects to use OER content and to deliver programmes/courses in the proposed programme areas.

These activities are mainly focussing on the following institutions: TVET colleges, CET colleges and skills providers.

Therefore the Intermediate Outcome is:

Develop the capacity of the PSET system (DHET, institutions, lecturers and content developers) in open learning.

Outputs are:

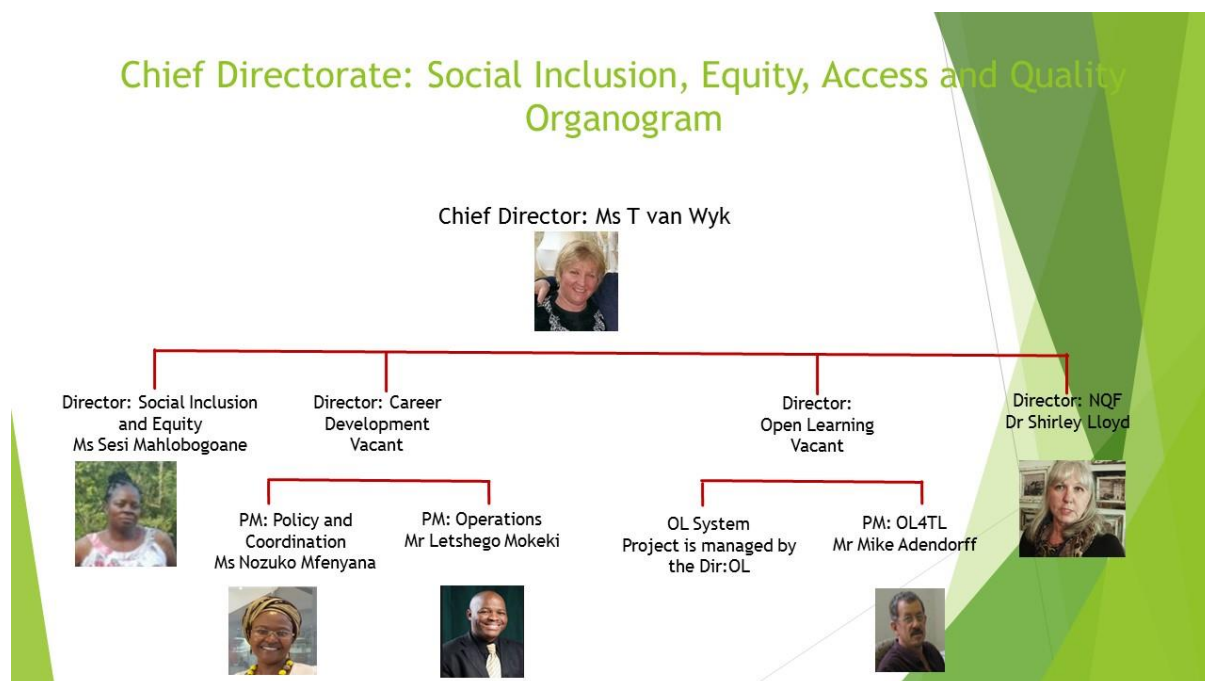
- Capacity is built in DHET in open learning;
- Capacity is built in institutions in open learning; and
- Capacity is built in lecturers and content developers in open learning.

The key performance indicators, main activities and milestones are summarised in the following table:

Activities	Key Performance Indicators	Milestones	Due Date
1. Ongoing workshops, training sessions, seminars, and other capacity building activities for DHET, institutions, lecturers and content developers	<ul style="list-style-type: none"> • A 'Capacity Development Grid' is updated on activities. 	Capacity is developed throughout the PSET system focussing on TVET colleges	Ongoing until March 2021
2. Develop a national network of institutions supporting open learning through sharing, capacity building and collaboration			
3. Develop and implement an advocacy and communication strategy to: <ol style="list-style-type: none"> Promote the use of OER in PSET; Clarify licence frameworks in PSET; 	<ul style="list-style-type: none"> • Advocacy and communication strategy approved by the DDG • Bi-annual reports on the implementation of the advocacy and communication strategy 	Advocacy and Communication Strategy approved Implementation reports quarterly	March 2019 Ongoing
4. Establish an OER Forum/Community of Practice to promote the use of OER in PSET	<ul style="list-style-type: none"> • A community of practice established and evidence is available on an information technology platform 	Information technology platform established and community of practice in operation	Dec 2018
	<ul style="list-style-type: none"> • An OER Forum established and functional 	Forum minutes and activities	Ongoing

3.4.3 Project Management, Accountability and Location in the DHET

The **Open Learning System** Project is located in the Chief Directorate: Social Inclusion, Equity, Access and Quality within the Branch: Policy, Planning and Strategy of the DHET. The following organogram shows the location as well as the inter-relation with the OL4TL project.



Due to scarcity of skills in open learning, the DHET is experiencing challenges in appointing a project manager on short term contract for the project. In order to ensure sustainability of and integrated decision making in open learning in PSET, the DHET has resolved that a permanent appointed Director: Open Learning will be managing the project directly. Interviews has already been taken place and it is envisaged that the Director will be appointed in March 2019.

The project also has an appointed a Deputy Director/Project Coordinator (since March 2016) who is responsible for materials development and a Senior Administrative Officer (since March 2016) who is responsible for administration of the project.

The project reports to the Chief Director: Social Inclusion, Equity, Access and Quality.

The Open Learning directorate will also be responsible for monitoring and evaluation of the project.

The Director: Open Learning will ensure that the activities undertaken in the project are in accordance with the approved project plans. He/she is responsible for ensuring that the project produces the required deliverables on time, within budgeted costs and at the level of quality required.

Key responsibilities include:

- Documenting the detailed Project Plan;
- Managing assigned resources according to the defined scope of the project;
- Implementing the following project processes: time / cost / quality / change / risk / issue / procurement / communication / acceptance management;
- Monitoring and reporting on project performance (re: schedule, cost, quality and risk);
- Reporting and escalating project risks and issues;
- Managing project interdependencies; and

- Making adjustments to the detailed plan as necessary to provide a complete picture of the progress of the project at any time.

3.4.4 Procurement Strategy

All procurement of services for the project will be undertaken in line with the DHET procurement policies and processes and will be via open request for services and tenders. The DHET has 3 procurement committees that oversee all procurement in line with National Treasury regulations:

- Bid Specification Committee which checks all terms of reference for technical and other accuracy;
- Bid Adjudication Committee which authorises the publication of all ToRs and requests; and
- Bid Evaluation Committee which evaluates the bids and awards the service to a provider.

The project follows the normal PFMA procurement processes to appoint service providers (where necessary).

Because of the capacity building nature of the project Earmarked Grants are set aside for Universities, TVET and CET Colleges. These monies are planned, approved, transferred, monitored and reported in institutions through the approved processes of managing Earmarked Grants to institutions.

3.4.5 Oversight and Reporting of the Project Implementation

The project is monitored and reported through the normal monitoring processes within the DHET. The Director: Open Learning will conduct regular monitoring and the Directorate: Development Support will initiate an independent monitoring and evaluation process with a midterm review of the project and a final evaluation at the end of the project.

Project outcomes has been included in the Annual Performance Plan (APP) of the DHET since 2015/6. Bi-annual reports are submitted to the Strategic Planning division of the DHET to report progress on APP targets of the DHET.

A Project Steering Committee was established, but was subsequently merged with the other EU funded project, the Teaching and Learning Development Support Programme, Sub-Project 2: OL4TL. This Committee provides oversight over implementation of the project.

The role of the steering committee is to:

- exercise oversight, leadership and decision-making on the project;
- ensure the project's scope aligns with the requirements of the stakeholder groups;
- provide the project team directly involved in the project with guidance on project business issues;
- ensure effort and expenditure are appropriate to stakeholder expectations;
- address any issues that have major implications for the project;
- keep the project scope under control as emergent issues force changes to be considered; and
- to approve project reports.

3.4.6 Relationship with other Branches/Units in the DHET

Because Open Learning Implementation cannot take place in isolation, it is working directly with the implementation branches responsible for UE, TVET and CET. Implementation of the project is taking place within these branches/institutions.

Regular meetings are held with other projects such as the CoS project. The **Open Learning System** Project is 100% integrated in the work of other branches and institutions.

3.4.7 Pre-conditions, project risks and strategies

The project is based on the open learning conceptual framework, user specifications of an open learning system and policy implications for government developed by the DHET based on consultation on the application and implementation of open learning in all 4 programme areas.

Project risks have been identified and have also been include in the Risk Register of the DHET and managed through DHET processes.

Risk Identified	Impact Assessment	Likelihood	Mitigation of risk	Contingency planning
Late start of the project due to late/no appointment of project staff	Critical	Common	Promote appointments	Project staff has partly been appointed DHET appointed a permanent Director for Open learning to manage the project
Lack of available local expertise for technology development	Minor	Moderate	The State Information Technology Agency (SITA) has been contracted to work with the Service Provider in developing the platforms Off the shelf/open source technologies/programs will be used	Service providers other than SITA can be appointed
SITA is unable to deliver on the contract	Critical	Common	SITA is managed closely and frequent management workshops/meetings are taking place	Service providers other than SITA can be appointed
Lack of support from internal stakeholders	Minor	Common	Communication and advocacy are taking place Integrate NOLS in the activities of all branches	Continued integration and collaboration need to take place
Lack of available open learning expertise and service providers	Critical	Likely	A wide range of service providers can be approached including PASA	The feasibility study has shown that there are sufficient open learning providers and expertise available locally
Slow procurement processes	Moderate	Moderate	DHET Planning Branch has experience in processes	Early submission of documentation/tenders to Supply chain Management (SCM)
Complexity of materials development models	Critical	Moderate	Multi-phase SCM/procurement processes approved	Continuous collaboration with SCM

The Results Framework is supplied as Annex 1

The Quarterly Milestones Table is supplied as Annex 4

3.5 Budget and Financial Management

EXPECTED PROJECT REVENUE FLOWS						
	2016/7	2017/8	2018/9	2019/20	2020/1	Total
Budget Support						
Project award	1 085	3 404	6 949	25 779	14 643	51 860
Other funds						
TOTAL FUNDS AVAILABLE	1 085	3 404	6 949	25 779	14 643	51 860

PROPOSED USE OF BUDGET SUPPORT FUNDS						
	2016/7	2017/8	2018/9	2019/20	2020/1	Total
Total use of Budget Support funds by year	1 085	3 404	6 949	25 779	14 643	51 860
BY COMPONENT						
Component A	1 027	1 183	498	3 976	3 985	10 669
Component B	0	2 100	6 308	18 416	8 026	34 850
Component C	58	121	143	3 387	2 632	6 341
BY ECONOMIC CLASSIFICATION (Budget Support)						
Compensation of Employees	572	1 156	1 158	2 447	2 167	7 500
Goods and Services	419	1 973	5 699	22 129	12 404	42 624
Machinery and Equipment	94	0	92	141	72	399
Transfers, Earmarked Grants and Subsidies	0	275	0	1 062	0	1 337

Notes:

- For 0,1 of the duration of the project, a Project Manager was appointed from Project Budget. For the remainder 0,9 of the duration of the project, project management was covered by Voted Funds (permanent appointment of Director: Open Learning). Both the compensation as well as the operational costs for this position were covered.
- This Open Learning System Project is working in parallel with the other Open Learning European Union-funded project, viz. the Teaching and Learning Development Support Programme, Sub-Project 2: Capacity Building for TVET College Lecturers through Open Learning as well as the European Technical Assistance (TA) Projects viz.: TA to capacitate DHET staff in open learning and TA to conduct Introductory and Provincial Open Learning Workshops for TVET and CET Colleges all towards achieving the directives from the White Paper and the outcomes of the Implementation strategy for Open Learning on Post-School Education and Training. Some of the budgets are shared between the projects, e.g. in capacity building
- Compensation of employees and operational costs have been distributed between the three components.

3.6 Progress in the Open Learning System Project since its inception

The Open Learning System Project was initiated in 2016/7 and has seen significant progress since its inception. Although expenditure remained low, the following **progress highlights** can be recorded:

3.6.1 Development of the L/CMS

The initial development of the L/CMS by SITA was terminated due to the archaic development approach that SITA has deployed. The DHET then developed the prototype of the L/CMS on the

Google CourseBuilder platform. Materials were uploaded but after evaluation and stress testing the platform was found to be inadequate for the volume and sophistication of the envisaged learning materials. The materials were migrated to a Moodle platform that is found to be much more robust and stable. The prototype is still available at the following address:

<http://dhet-tvet-lms.co.za/login/index.php> (case sensitive). Because users have to be registered on the system by the administrator, the following login credentials can be used:

Username: trudi

Password: trudivanwyk

Direct links to samples can be accessed at:

Basic Hand Tools- <http://dhet-tvet-lms.co.za/course/view.php?id=30>

Kirchoff's Law- <http://dhet-tvet-lms.co.za/course/view.php?id=32>

Due to the compulsory use of the State Information Technology Agency (SITA) for the development of systems, the DHET reverted back to SITA as the service provider to develop the L/CMS. SITA has changed their development approach to an 'agile' development approach that is much more applicable to the needs of the NOLS. On 9 January 2018 a letter was issued to SITA to develop a proposal for developing the L/CMS. Work with SITA during February and March resulted in the development of the following project documents:

- User Story;
- User Specifications; and
- Proposal.

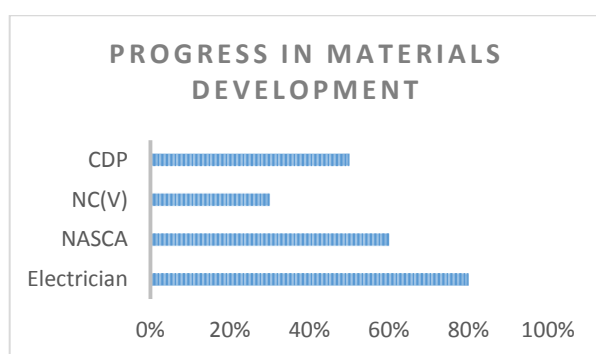
The proposal with costings was submitted to the approval process of DHET and was approved by the DG on 27 June 2018. A purchase order has been issued, and SITA began the development process during July 2018.

3.6.2 Development of Open Learning Materials

There are 4 sub-projects in this component, viz:

- Materials are developed for the National Occupational Certificate: Electrician;
- Materials are developed for the National Senior Certificate for Adults (NASCA);
- Materials are developed for two subjects of the National Certificate (Vocational) (NC(V)); and
- Materials are developed for the Occupational Certificate: Career Development Information Officer.

Progress in materials development is reflected in the following diagram:



National Occupational Certificate: Electrician

The process to develop open learning materials for the Occupational Certificate: Electrician (QCTO Curriculum Code 6711011000) was initiated with the appointment of a service provider, Neil Butcher and Associates (NBA), on 22 September 2017. The process was designed to follow these broad steps:

- Analyse the Business Process Description document prepared by SITA, appraise the learning management platform currently in use for the NOLS and make recommendations for future use;
- Refine the curriculum approach;
- Develop a Terms of Reference for and a detailed schedule of work to be done by the team of subject matter experts during each phase of the materials development process;
- Produce the 'Occupational Certificate: Electrician Curriculum Content' document for the registered qualification;
- Develop the 'Open Learning Teaching and Learning Resources and Assessment Tasks for the Occupational Certificate: Electrician' document;
- Develop the 'Flexible Learning Pathways for the Occupational Certificate: Electrician'; and
- Develop a set of specifications to for the digitally supported teaching and learning resources and multimedia materials for the programme.

This work was completed on 31 March 2018. The following are available on <http://ol4nocelectrician.weebly.com>:

- Detailed Programme Overview;
- Teaching and Learning Resources and Assessment Tasks;
- Learning Pathways;
- Materials Development Specifications;
- Digital Asset Register;
- Storyboards;
- Style guide; and
- Open Learning and Teaching Resources.

A tender for the development of the digitally supported teaching and learning resources and multimedia materials has been published and is in the process of appointment of a service

provider. The development of digital learning resources is scheduled to be completed by January 2021. This process will be overseen by Neil Butcher and Associates as a second phase to their appointment.

The sub-project is 80% completed.

National Senior Certificate for Adults

The process to develop open learning materials for five subjects in the NASCA programme was initiated with the appointment of a service provider, the South African Institute for Distance Education (SAIDE), on 2 November 2017. The service provider will deliver the completed self-study open learning materials by April 2020.

The process was designed to follow these broad steps:

- Designing an approach to developing self-directed learning materials, activities, assessment tasks and multi-media for the subjects of the NASCA programme;
- Developing detailed subject outlines for each of the subjects;
- Developing a comprehensive list of resources available as OER that can be used for each subject and where adaptation to the OER are required, a detailed description of the required adaptations;
- A full set of activities, assessment tasks, videos, animations, graphics and interactive multi-media developed for each of the subjects;
- A complete lecturer's guide for CET lecturers and practitioners on how to effectively integrate the activities, assessment tasks and multi-media resources into a coherent expression of the subject content; and
- A complete student's guide to assist students to study through self-directed learning methods.

The project plan has been approved, existing OER were reviewed by the service provider with the support of subject matter experts. Materials development has commenced and is 60% completed.

National Certificate (Vocational)

The tender for the appointment of a suitable service provider to adapt current OER and produce digital teaching and learning resources (courseware) for two subjects of the National Certificate (Vocational), viz. Physical Science and Mathematics has been published and closed on 15 February 2019. Evaluation of the tenderers will only take place once the approval from National Treasury to the extension of the project has been obtained. The project is 30% completed.

Occupational Certificate: Career Development Information Officer

The materials for the Occupational Certificate: Career Development Information Officer have been developed by the EDTP SETA and the DHET. A tender will be prepared to adapt the materials for an open learning environment. The sub-project is 50% completed.

3.6.3 Capacity building in open learning and the use of OER

Capacity development is an ongoing process. Several workshops, seminars and meetings were held where DHET officials, institutional management and teaching staff as well as materials developers were capacitated in various aspects of open learning including materials development, management, assessment, OER and copyright.

Appendices to Business Plan

Appendix 1: Results Framework

Project Name:	Open Learning System for Post-School Education and Training
Project Objectives:	<p>The overall objective of the project is to design, develop and pilot an enabling environment for the implementation of open learning approaches and to identify workable models of open learning, especially for materials development in an open learning context. The intended benefits to be realised through the project are the operationalisation of an L/CMS where students and lecturers can access LTSM as well as self-directed learning opportunities. It furthermore provides capacity building in open learning and the use of OER across the PSET system. This Open Learning System project will therefore assist the DHET in achieving the goal of increased access to quality teaching and learning materials and opportunities and build the understanding open learning and how to apply it in the PSET system.</p> <p>The open learning objectives of the Open Learning System project will contribute to (sphere of influence) are:</p> <ul style="list-style-type: none"> • Open learning principles are progressively harnessed in PSET institutions; • Information and Communication Technology (ICT) is used as an enabler for teaching and learning in PSET; • High quality, shared teaching and learning resources are increasingly available as OER; and • Students in the PSET system are provided with an efficient open learning system with viable options for learning. <p>The Delivery Agreement and Outcome 5, that the Minister of Higher Education and Training signed with the President initially in 2010, namely the development of a “skilled and capable workforce to support an inclusive growth path”, together with the associated outputs 5.2 (dealing with Increase access to programmes leading to intermediate and high level learning) and 5.3 (dealing with Increase access to occupationally-directed programmes in needed areas and thereby expand the availability of intermediate level skills (with a special focus on artisan skills)) mandated the Minister of Higher Education and Training to increase access to quality learning and teaching programmes in the PSET sector. It has implications for Outcome 4: Decent employment through inclusive economic growth.</p>
Project Outcomes:	<p>The Project’s ultimate Outcome is the uptake, adoption or use of project outputs by the project beneficiaries.</p> <p>The outcomes of the project include:</p> <ul style="list-style-type: none"> • Develop models for a national Learning/Content Management System and materials development; • Provide guidance and direction to the deployment of open learning in institutions; • Build capacity to develop open educational resources; and • Build capacity in developing, managing, maintaining and sustaining open learning in PSET.
Project Components:	<p>The intermediate outcomes of the project that are broken down into outputs and activities related directly to the project components (see 3.4.2). These include:</p> <ul style="list-style-type: none"> • Develop the Learning/ Content Management System for the NOLS; • Develop materials for 4 programmes in the PSET; and • Develop the capacity of the PSET system in developing open learning materials and the use of OER.
Project Inputs:	<p>Financial: Project budget, voted funds, collaboration with other funded projects (donor/voted/NSF)</p> <p>Human: Project Manager/Director; Project Coordinator/Deputy-Director, Senior Administrative Assistant; other Open Learning staff; staff in other projects that this project is collaborating with; staff in institutions</p> <p>Other Resources: Projects, DHET, institutions</p>

**Project
Baseline:**

In Chapter 7 of the White Paper for Post-School Education and Training (2014) the DHET commits to working toward creating a PSET landscape based on open learning principles; Implementation Strategy for Open Learning in Post-School Education and Training (2016).

Open learning conceptual framework and policy implications for government (2013) provides ten strategic objectives for open learning and an implementation plan.

Other enabling legislation and policies include:

- Section 38.1 of the Higher Education Act (Act No 101 of 1997) supports collaboration and partnerships in higher education between public universities;
- The Continuing Education and Training Act (Act No 16 of 2006) commits to 'ensure access to basic adult education, further education and training and the workplace through continuing education and training by persons who have been marginalised in the past such as women, the disabled, and the disadvantaged'. It further commits to 'provide optimal opportunities for learning, the creation of knowledge and the development of intermediate- to high-level skills, in keeping with international standards of academic and technical quality.' The act furthermore emphasises the provision of opportunities for life-long learning;
- The Skills Development Act (Act No 97 of 1998) requires that learners have access to high quality and appropriate education and training, and to skills development opportunities accessible in a work-integrated approach. It emphasises the relevance of education in the workplace and learning 'on the job';
- The White Paper on Education and Training (1995) focusses on Transformation and an integrated system (Chapter 2) and Equality, Access, Redress and Quality (Chapter 4). It furthermore in Chapter 5 addressed the establishment of NOLA and adoption of Open learning principles – Open Learning is an approach which combines the principles of learner centredness, lifelong learning, flexibility of learning provision, the removal of barriers to access learning, the recognition for credit of prior learning experience, the provision of learner support, the construction of learning programmes in the expectation that learners can succeed, and the maintenance of rigorous quality assurance over the design of learning materials and support systems;
- The Policy for the Provision of Distance Education in South African Universities in the Context of an Integrated Post-School System (2014) signals the intent of the DHET to draft a policy on partnerships and collaboration that will likely also formalise opportunities for institutions to collaborate on the offering of programmes, that in itself open up learning. It recognises the impact of ICT on the provision of education in the higher education sector, and supports the creation of an enabling environment for appropriate integration of ICT, and the expansion of distance education provision in an orderly manner in which access and quality issues are at the forefront;
- White Paper 3 on the Transformation of the Higher Education System (2007) promoted the development of a flexible learning system, including distance education and resource-based learning based on open learning principles. It also directs to expanding the range of programmes and increasing enrolments based on open learning and distance education, especially for young and older adults, with particular emphasis on women. The policy includes a whole section on Distance education and resource-based learning. It also supports the development of a national network of centres of innovation in course design and development, as this would enable the development and franchising of well-designed, quality and cost-effective learning resources and courses, building on the expertise and experience of top quality scholars and educators in different parts of the country;
- White Paper 4: A Programme for the Transformation of Further Education and Training (1998) commits to the development and expansion of high-quality, flexible, innovative Further Education and Training (FET) (now TVET) institutions, based on the principles of open learning and responsiveness to the needs and demands of all learners of 15 or over;

- The National Policy on Community Education and Training Colleges (2014) provides a framework for the provision of a diverse range of programmes, including different modalities for delivery. In the long term, online programmes are going to be one of the critical modes of provision for delivery of community education and training programmes;
- The DHET published the Articulation Policy (No 373, Government Gazette No 39867, 30 March 2016) to provide purposes, principles and recommendations to inform the articulation practices of role-players in the PSET system. It facilitates the access, progression and mobility of students between and within the three sub-frameworks of the NQF;
- The Minister has published the RPL Co-ordination Policy (No 381, Government Gazette No 39876, 31 March 2016), which is a clear statement and indicator that supports and recognises the need to open access to education for students, and acknowledges that RPL is an important component of addressing this need;
- SAQA has published the National Policy for the Implementation of the Recognition of Prior Learning (2014), which provides for the operational implementation of RPL by the three QCs, professional bodies and education and training institutions; and
- The White Paper 7 on eEducation advances the development of digital content, the development of learning and teaching platforms, as well as the use of ICT and affordable connectivity for teaching and learning.

Several projects such as the TVET College connectivity project, the CoS project and the Lecturer Support Programme, to name a few are all promoting the use of ICT, sharing of resources, development of OER and collaborative development of shared resources.

Component Results Framework		
Component A: Development of an open learning L/CMS for PSET		
Component Intermediate Outcome: Develop the L/CMS for the NOLS	Component Outputs: <ul style="list-style-type: none"> • A model for a national L/CMS developed; • An open learning L/CMS is developed; • Materials are uploaded to the L/CMS; and • A maintenance and sustainability plan is developed for the L/CMS. 	Activities: <ol style="list-style-type: none"> 1. Develop a model for a national L/CMS 2. Develop the user story and user requirements specifications for the national L/CMS 3. Develop Business Process Diagrams (BPDs) for the national L/CMS 4. Product development and testing 5. Handover of product by SITA
Outcome Indicators: L/CMS for the NOLS is operational with content uploaded	Output Indicators: <ul style="list-style-type: none"> • A document describing the model for the L/MS is approved by the DG • The user story and user requirements specifications are approved by the CD:PS • BPDs are developed and approved by the CD:PS • L/CMS is developed and tested and all development and process documents are signed off by the CD:PS • The contract with SITA is concluded and final invoice signed 	
Component B: Development of materials for 4 programmes in the PSET		
Component Intermediate Outcome: Materials are developed for 4 programmes (identified by the DHET) in the PSET	Component Outputs: <ul style="list-style-type: none"> • Materials are developed for the National Occupational Certificate: Electrician; • Materials are developed for the National Senior Certificate for Adults (NASCA); • Materials are developed for two subjects of the National Certificate (Vocational) (NC(V)); • Materials are developed for the Occupational Certificate: Career Development Information Officer; and • A preferred model for the development of materials is developed. 	Activities: For each of the sub-programmes the following activities are pursued: <ol style="list-style-type: none"> 1. Seek approval from the relevant branch to develop specific materials 2. Develop TOR for Service Providers to develop the materials 3. Appoint a Service Provider to assist in the development of the materials 4. Materials are developed

Outcome Indicators: Materials are available on the L/CMS for the NOLS	Output Indicators: <ul style="list-style-type: none"> Materials are available on the L/CMS Model for the development of materials has been adopted by the DHET and approved by the DG 	5. Materials are uploaded to the L/CMS (depending on the model of development and presentation agreed on) 6. The model used in the development is documented
Component C: Development of materials for 4 programmes in the PSET		
Component Intermediate Outcome: Develop the capacity of the PSET system (DHET, institutions, lecturers and content developers) in open learning.	Component Outputs: <ul style="list-style-type: none"> Capacity is built in DHET in open learning; Capacity is built in institutions in open learning; and Capacity is built in lecturers and content developers in open learning. 	1. Ongoing workshops, training sessions, seminars, and other capacity building activities for DHET, institutions, lecturers and content developers 2. Develop a national network of institutions supporting open learning through sharing, capacity building and collaboration 3. Develop and implement an advocacy and communication plan to: <ul style="list-style-type: none"> Promote the use of OER in PSET; Clarify licence frameworks in PSET; 4. Establish an OER Forum/Community of Practice to promote the use of OER in PSET
Outcome Indicators: <ul style="list-style-type: none"> The DHET is provided with guidance and direction in the deployment of open learning; Institutions are provided with guidance and direction in the deployment of OER; Capacity is built within a cadre of lecturers to develop OER; Capacity is built within a cadre of other content specialists to develop OER; Capacity is built in the DHET in developing, managing, maintaining and sustaining open learning in PSET; Capacity is built in institutions in developing, managing, maintaining and sustaining open learning in PSET; Capacity is built in the DHET in model building for open learning systems; Capacity is built in the DHET in content management; 	Output Indicators: <ul style="list-style-type: none"> A 'Capacity Development Grid' is updated on activities. Advocacy and communication strategy approved by the DDG Bi-annual reports on the implementation of the advocacy and communication strategy A community of practice established and evidence is available on an information technology platform An OER Forum established and functional 	

<ul style="list-style-type: none"> • Capacity is built in the DHET in learning management, assessment and certification in an open learning environments; • Capacity is built in institutions and projects to use OER content and to deliver programmes/courses in the proposed programme areas. 		
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Appendix 2: Component budget input tables

PROPOSED USE OF BUDGET SUPPORT FUNDS BY COMPONENT

INPUT TYPE	EXPENDITURE CATEGORY (GFS)	2016/7	2017/8	2018/9	2019/20	2020/1	TOTAL AVAILABLE BUDGET SUPPORT FUNDS
COMPONENT A							
SITA Developments	Goods and Services: Service Providers	94	15		2976	1985	5070
SITA User Needs	Goods and Services: Service Providers	258	1				259
SITA Maintenance	Goods and Services: Service Providers				1000	2000	3000
Operational Costs							0
Laptops, printers and software	Machinery and equipment	94		39			133
Compensation (personnel)	Compensation of employees	572	1156	438			2166
Printing, stationery, minor assets	Goods and services: Printing, Stationary, minor assets	9	11	21			41
COMPONENT B							
NOC: Electrician							
1. NBA	Goods and Services: Service Providers		1825	4666			6491
2. Subject Expert Group	Transfers		275		1062		1337
3. Multi-media Production	Goods and Services: Service Providers				4000	1000	5000
NASCA							0
1.SAIDE	Goods and Services: Service Providers			868	4174	1000	6042
2. Subject Expert Group	Goods and Services: Service Providers				3639		3639
NC(V)							0
1.Service Provider	Goods and Services: Service Providers				3000	2000	5000

INPUT TYPE	EXPENDITURE CATEGORY (GFS)	2016/7	2017/8	2018/9	2019/20	2020/1	TOTAL AVAILABLE BUDGET SUPPORT FUNDS
Career Development Information Officer							0
1.Service Provider	Goods and Services: Service Providers				1000	3000	4000
Operational Costs							0
Laptops, printers and software	Machinery and equipment			53	80		133
Compensation (personnel)	Compensation of employees			720	1447		2167
Compensation: Upload to NOLS	Compensation of employees					1000	1000
Printing, stationery, minor assets	Goods and services: Printing, Stationary, minor assets			1	14	26	41
COMPONENT C							
Promoting Open Learning and OER	Goods and Services: Venues, catering, accommodation, travel	58	13	123	1806	1000	3000
Institutional Capacity to deliver courses	Goods and Services: Venues, catering, accommodation, travel		108	20	500	372	1000
Operational Costs							0
Laptops, printers and software	Machinery and equipment				61	72	133
Compensation (personnel)	Compensation of employees				1000	1167	2167
Printing, stationery, minor assets	Goods and services: Printing, Stationary, minor assets				20	21	41
Total		1 085	3 404	6 949	25 779	14 643	51860

Appendix 3: Cash use projection and requested disbursement schedule

EXPECTED USE OF CASH

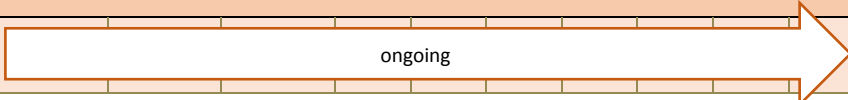
	Actual Expenditure			2019/20				2020/1			
	2016/7	2017/8	2018/9	Q1	Q2	Q3	Q4	Q1	Q2	Q3	Q4
COMPONENT A											
COMPENSATION OF EMPLOYEES	572	1156	438	0	0	0	0	0	0	0	0
GOODS AND SERVICES	361	27	21	500	1276	1200	1000	0	1000	1550	1435
MACHINERY AND EQUIPMENT	94	0	39	0	0	0	0	0	0	0	0
TRANSFERS, EARMARKED GRANTS AND SUBSIDIES	0	0	0	0	0	0	0	0	0	0	0
SUB-TOTAL	1 027	1 183	498	500	1 276	1 200	1 000	0	1 000	1 550	1 435
COMPONENT B											
COMPENSATION OF EMPLOYEES	0		720	361	362	362	362	300	300	300	100
GOODS AND SERVICES	0	1825	5535	3000	3500	4000	5327	0	3004	1680	2342
MACHINERY AND EQUIPMENT	0		53	20	0	40	20	0	0	0	0
TRANSFERS, EARMARKED GRANTS AND SUBSIDIES	0	275		0	500	400	162	0	0	0	0
SUB-TOTAL	0	2 100	6 308	3 381	4 362	4 802	5 871	300	3 304	1 980	2 442
COMPONENT C											
COMPENSATION OF EMPLOYEES	0	0	0	0	0	500	500	291	292	292	292
GOODS AND SERVICES	58	121	143	564	580	582	600	565	464	364	0
MACHINERY AND EQUIPMENT	0	0	0	0	0	61	0	72	0	0	0
TRANSFERS, EARMARKED GRANTS AND SUBSIDIES	0	0	0	0	0	0	0	0	0	0	0
SUB-TOTAL	58	121	143	564	580	1 143	1 100	928	756	656	292
TOTAL	1 085	3 404	6 949	4 445	6 218	7 145	7 971	1 228	5 060	4 186	4 169

Appendix 4: Quarterly milestone table

Nr	Milestone Description	2016/7	2017/8	2018/9	2019/20				2020/1			
					Q1	Q2	Q3	Q4	Q1	Q2	Q3	Q4
COMPONENT A: Development of an open learning L/CMS for PSET												
1	A model for a national L/CMS developed							X				
1.1	Draft model for a national L/CMS developed				X							
1.2	Consultation with various stakeholders on the draft model					X						
1.3	Final draft model developed					X						
1.4	Final draft model presented to Senior Management						X					
1.5	Model finalised						X					
1.6	Model approved by DG							X				
2	An open learning L/CMS is developed									X		
2.1	The user story and user requirements specifications are approved by the CD:PS			X								
2.2	BPDs are developed and approved by the CD:PS			X								
2.3	L/CMS is developed and tested and all development and process documents are signed off by the CD:PS								X			
2.3.1	Requirements gathering				X							
2.3.2	Design				X							
2.3.3	Develop/configuration							X				

Nr	Milestone Description	2016/7	2017/8	2018/9	2019/20				2020/1			
					Q1	Q2	Q3	Q4	Q1	Q2	Q3	Q4
2.3.4	Assess product default functionality							X				
2.3.5	Catalogue configuration requirements and identify customisations							X				
2.3.6	Configure solution							X				
2.3.7	Review configuration and adjust configuration							X				
2.3.8	Quality assurance and acceptance									X		
2.3.9	Go-live support									X		
2.4	The contract with SITA is concluded and final invoice signed									X		
COMPONENT B: Development of materials for 4 programmes in the PSET												
3	Materials are available on the L/CMS											X
3.1	Develop materials for the National Occupational Certificate: Electrician that includes:											
3.1.1	Seek approval from the relevant branch to develop specific materials	X										
3.1.2	Develop Terms of Reference (TOR) for Service Providers to develop the materials' curriculum content		X									
3.1.3	Appoint Service Providers to assist in the development of the materials		X									
3.1.4	Materials are developed				X							
3.1.5	Materials are uploaded to the internet for the second service provider to use in developing the multi-media				X							

Nr	Milestone Description	2016/7	2017/8	2018/9	2019/20				2020/1			
					Q1	Q2	Q3	Q4	Q1	Q2	Q3	Q4
3.1.6	Develop Terms of Reference (TOR) for Service Providers to develop the materials' multi-media			X								
3.1.7	Appoint Service Providers to assist in the development of the materials				X							
3.1.8	Materials' multi-media are developed											X
3.1.9	Materials are uploaded to the L/CMS											X
3.1.10	The model used in the development is documented											X
3.2	Develop materials for the NASCA that includes:											
3.2.1	Seek approval from the relevant branch to develop specific materials	X										
3.2.2	Develop TOR for Service Providers to develop the materials		X									
3.2.3	Appoint a Service Provider to assist in the development of the materials		X									
3.2.4	Materials are developed								X			
3.2.5	Materials are uploaded to the L/CMS (depending on the model of development and presentation agreed on)											X
3.2.6	The model used in the development is documented											X
3.3	Develop materials for two subjects of the NC(V) that includes:											X
3.3.1	Seek approval from the relevant branch to develop specific materials	X										
3.3.2	Develop Terms of Reference (TOR) for Service Providers to develop the materials			X								
3.3.3	Appoint a Service Providers to assist in the development of the materials					X						

Nr	Milestone Description	2016/7	2017/8	2018/9	2019/20				2020/1			
					Q1	Q2	Q3	Q4	Q1	Q2	Q3	Q4
3.3.4	Materials are developed										X	
3.3.5	Materials are uploaded to the L/CMS (depending on the model of development and presentation agreed on)											X
3.3.6	The model used in the development is documented											X
3.4	Develop materials for the Occupational Certificate: Career Development Information Officer that includes:											X
3.4.1	Seek approval from the relevant branch to develop specific materials	X										
3.4.2	Develop Terms of Reference (TOR) for Service Providers to develop the materials				X							
3.4.3	Appoint a Service Providers to assist in the development of the materials					X						
3.4.4	Materials are developed										X	
3.4.5	Materials are uploaded to the L/CMS (deepening on the model of development and presentation agreed on)											X
3.4.6	The model used in the development is documented											X
4	Develop a preferred model for the development of materials that includes:											X
4.1	Analyse different models developed throughout this project as well as through the OL4TL sub-project											X
4.2	Consider the recommendations from the analysis and develop a preferred model for materials development for the DHET											X
COMPONENT C: Development of capacity of the PSET system in developing open learning materials and promoting the use of OER												
5	Ongoing workshops, training sessions, seminars, and other capacity building activities for DHET, institutions, lecturers and content developers											X

Nr	Milestone Description	2016/7	2017/8	2018/9	2019/20				2020/1			
					Q1	Q2	Q3	Q4	Q1	Q2	Q3	Q4
6	Develop a national network of institutions supporting open learning through sharing, capacity building and collaboration				ongoing							X
7	Develop and implement an advocacy and communication plan to: a. Promote the use of OER in PSET; b. Clarify licence frameworks in PSET;											
7.1	Develop An Advocacy and Communication Strategy			X								
7.2	Promote the use of OER in PSET				ongoing							X
7.3	Clarify licence frameworks in PSET				ongoing							X
8	Establish an OER Forum/Community of Practice to promote the use of OER in PSET											X
8.1	A community of practice established and evidence is available on an information technology platform			X	ongoing							X
8.2	An OER Forum established and functional			X	ongoing							X
9	Close down of Project											X
9.1	Financial Close-out report signed off by the CFO											X
9.2	Project Close-out report signed off by the DG											X

Appendix 5: Alignment of Open Learning Projects

ITEM	BUSINESS PLAN OUTPUTS	ORIGINAL BUDGET (Original Business Plan)		ADJUSTED BUDGET (Amended Business Plan Feb 2019)		OUTPUTS TRANSLATED INTO PROJECTS	ACTUAL EXPENDITURE/BUDGET		DUE DATE	
		NOLS	OL4TL	NOLS	OL4TL		NOLS	OL4TL	NOLS	OL4TL
LM/CM System development	System development and technical services	5 140 000		8 328 828		SITA Developments	5 069 462		Sept 2020	
	Hardware and software environment	3 160 000				SITA User Needs	259 366		Mar 2019	
	Implementation Strategy for LM/CM System					SITA Maintenance	3 000 000		Mar 2021	
Content and materials Development	Materials development (NOLS) • 1 Skills Programme • 4 NASCA subjects • 2 NCV subjects • 1 CDS programme	22 460 000		31 509 053		NOC: Electrician				
						1. NBA	6 491 466		Jan 2021	
						2. Subject Expert Group	1 337 023		May 2019	
		7 052 000				3. Multi-media Production	5 000 000		Jan 2021	
						NASCA				
						1.SAIDE	6 042 004		Apr 2020	
						2. Subject Expert Group	3 638 560		Apr 2020	
						NC(V)				
						1.Service Provider	5 000 000		Dec 2020	
						Career Development Information Officer				
						1.Service Provider	4 000 000		Dec 2020	

ITEM	BUSINESS PLAN OUTPUTS	ORIGINAL BUDGET (Original Business Plan)		ADJUSTED BUDGET (Amended Business Plan Feb 2019)		OUTPUTS TRANSLATED INTO PROJECTS	ACTUAL EXPENDITURE/BUDGET		DUE DATE	
		NOLS	OL4TL	NOLS	OL4TL		NOLS	OL4TL	NOLS	OL4TL
	Two programmes/courses, including Adv Dip TVT, developed		18 638 000		13 638 000	Subject expert groups to develop curriculum content documents and materials development guidelines for 8 courses in the Adv Dip TVT (~50 credits)		1 000 000		Sept 2018
						A university develops the self-directed learning materials for the 8 courses of the Adv Dip TVT (~50 credits)		6 500 000		Dec 2019
						Complete the materials development for the remainder of the programme Adv Dip TVT (~70 credits)		4 500 000		Oct 2020
						Adapt the developed materials for CPD		1 638 000		Oct 2020
Capacity Building	Promoting Open Learning and OER	11 748 400		4 000 000	3 500 000	Promoting Open Learning and OER	3 000 000		Dec 2020	
	Institutional Capacity to deliver courses					Institutional Capacity to deliver courses		3 500 000	Dec 2020	
	Internal capacity to manage open learning					Internal capacity to manage open learning		500 000	Dec 2020	
	Career Interest Questionnaire						1 000 000		Jun 2019	

ITEM	BUSINESS PLAN OUTPUTS	ORIGINAL BUDGET (Original Business Plan)		ADJUSTED BUDGET (Amended Business Plan Feb 2019)		OUTPUTS TRANSLATED INTO PROJECTS	ACTUAL EXPENDITURE/BUDGET		DUE DATE	
		NOLS	OL4TL	NOLS	OL4TL		NOLS	OL4TL	NOLS	OL4TL
Case Studies	Develop Conceptual Framework including methodology and publication	1 800 000	10 207 000		8 850 000	16 case studies		8 000 000		Jun 2018
	Conduct case studies and write them up									Jul 2020
	National Open Learning Conference					Conference		550 000		Oct 2020
	Printing					Printing		300 000		Sept 2020
Impact Assessment of Project Activities	Support and regular monitoring of project activitied, outputs and processes					Support and regular monitoring of project activitied, outputs and processes			Ongoing	Ongoing
	Impact Assessment (Mid-term)					Activity removed - part of component 4 of the TLDSP				
	Impact Assessment (End of project)					Activity removed - part of component 4 of the TLDSP				
Policy and Enabling Environment						Policy Framework for PSET (publication, launch, etc.) - OL directorate budget				
						DHET Position Paper on e-learning				
					712 000	Legislation & policy analysis		712 000		Oct 2019

ITEM	BUSINESS PLAN OUTPUTS	ORIGINAL BUDGET (Original Business Plan)		ADJUSTED BUDGET (Amended Business Plan Feb 2019)		OUTPUTS TRANSLATED INTO PROJECTS	ACTUAL EXPENDITURE/BUDGET		DUE DATE	
		NOLS	OL4TL	NOLS	OL4TL		NOLS	OL4TL	NOLS	OL4TL
Advocacy, Communication and Network Building	Develop a national network of institutions supporting open learning through sharing, capacity building and collaboration					Develop a national network of institutions supporting open learning through sharing, capacity building and collaboration			Ongoing	Ongoing
	Develop a national network of universities supporting open learning through sharing, capacity building and collaboration (OL4LD BP)					Develop a national network of universities supporting open learning through sharing, capacity building and collaboration (OL4LD BP)				Ongoing
Operational Costs		500 000	1 155 000	8 022 519	2 800 000					
	Machinery and Equipment					Laptops, printers and software	400 000		Ongoing	
	Compensation of Employees					Compensation (personnel): Mike, Tanya, George	6 500 000	2 800 000	Ongoing	Ongoing
						Compensation: Upload to NOLS	1 000 000		Ongoing	
	Operational Costs					Printing, stationery, minor assets	122 519		Ongoing	
		51 860 400	30 000 000	51 860 400	30 000 000	Total	51 860 400	30 000 000		