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Turning Points Consultancy CC

Times of change are when we learn most.

Consultancy Report:

Assessment of the Zambia College of Distance Education (ZACODE)

Justin Ellis

Commissioned by

The Commonwealth of Learning

November 2009

Quotes from learners in DODE afternoon classes, Lusaka



Christine Shumba

“There are so many things that I wanted in my life. Since I am 58 now I wanted to know, what is knowledge, and what is it going to give me? Since all my children are graduates, I thought that maybe I should also go to school and get knowledge. Thereafter I found that school is really my key for everything I can be in my life...”

(Anon)

“...I decided not to just sit at home... When I make it, I think in my life I will be able to help myself, without depending on somebody.”

Banda Lobati

I stopped school due to some circumstances... I thought it is a good idea for me to go back to school because it is cheaper than those who are coming in the morning. It's affordable. (K450 000 per year, about US\$100.)

Doreen Kakwawe

I had to nurse my kids; I didn't have enough time. Then I was advised to come here since it is only three hours in the afternoon. I am a single parent. I was supposed to finish school ten years ago. But after my Mum passed away I couldn't continue as I didn't get any support. But I saw that I wasn't benefiting anything. I was advised to come and join my aunt there and go back to school... Here I am today, very happy to be writing my final exams which will help me to find a better place in society and look after everyone.

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Terms of Reference and Context

This study was carried out at the request of the Ministry of Education, Zambia. The Commonwealth of Learning contracted Turning Points Consultancy CC, a Namibian company, who provided the services of Justin Ellis, to “carry out an evaluation of the Zambia College of Distance Education (ZACODE) and submit recommendations to the Ministry of Education, Zambia, on measures to be taken to redesign the operations of the college.”

More specifically, the consultant was required to:

1. identify the requirements needed to become an open school such as the Namibian College of Open Learning (NAMCOL) or the Botswana College of Distance and Open Learning (BOCODOL);
2. evaluate the existing structure and make recommendations in regards to the human resources the college needs to provide open and distance education (including training and content);
3. consider a funding model and make recommendations;
4. travel to the Copperbelt region of Zambia, accompanied by the Director of the Directorate of Distance Education (DODE) (or his representative) to review the location of the college and assess whether it can respond to the needs of the country from its current location(physically and administratively);
5. make recommendations for the process to be followed for it to become a parastatal (draft an action plan);
6. conduct interviews as well as hold focus group discussions/sessions with stakeholders to assess their views;
7. brief the stakeholders on the findings/recommendations on the last day; and
8. prepare a final report with recommendations and an action plan and submit to COL.



The Zambia College of Distance Education (ZACODE) at Luanshya

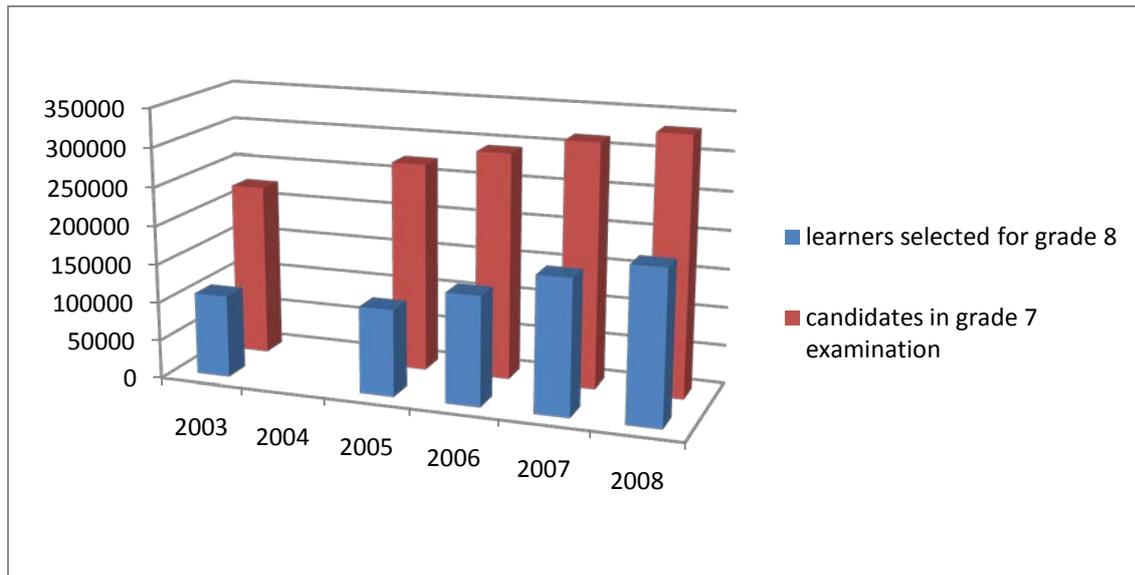
After a week of preparatory reading, the consultant visited Zambia from 19 – 31 October 2009, where he was ably assisted by the Directorate of Distance Education (DODE) in the Ministry of Education to interview the stakeholders that had been identified. The visit to the Zambia College of Distance Education (ZACODE) duly took place from 22 to 24 October 2009. The consultant would like to express particular thanks to the Director of DODE, Mr Victor Muyatwa, and Ms Rhoda Mweetwa, Principal Education Officer, for making all the arrangements and attending to various requests. A fuel shortage at the time of the visit did not make anything easier.

The terms of reference are systematically attended to in subsequent sections of this report. However, to understand some of the recommendations which are made later in the report it is necessary to make some preliminary observations about the context of ZACODE and Open Schooling in Zambia.

1. Zambia is making a determined effort to expand access to secondary education.

In 2003, 224 867 Zambian learners (99 227 or 44% girls) wrote the grade 7 examination at the end of the primary phase. Only 107 132 (53 307 or 50% girls) were selected to proceed to grade 8, or the first of two years of upper basic education. Only 48% of learners therefore proceeded to grade 8 in the formal system. By 2008, however, there had been an impressive 48% improvement in access. In that year 332 279 learners (150 764 or 45% girls) wrote the examination and 197 259 (98 023 or 50% girls) were selected for grade 8. Sixty percent therefore proceeded to grade 8.

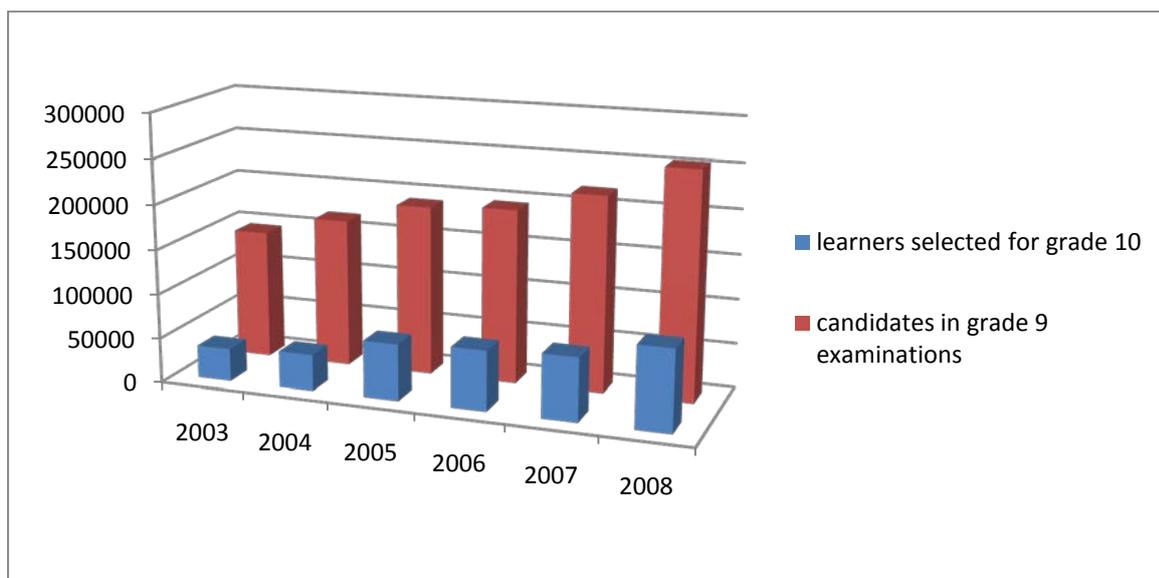
Graph: Candidates in national grade 7 examinations and those selected for grade 8, 2003 - 8



Source: Data supplied by Ministry of Education

Similarly, in the transition from basic education to high school, in 2003, 145 121 learners (47% girls) wrote the grade 9 examination, but only 36 443 learners (47% girls) were selected for grade 10. Only 25% therefore proceeded to formal high schools. By 2008, the number of learners writing the grade 9 junior certificate examination had gone up by 75% to 254 032 candidates (47% girls) of whom 90 672 (46% girls) were selected for grade 10. Thirty-six percent therefore proceeded to grade 10.

Graph: Candidates in national grade 9 examination and those selected for grade 10



Source: Data supplied by Ministry of Education

Government is apparently committed to further expansion of secondary education. In his motivation of the 2010 budget, the Minister of Finance and National Planning, on 9 October 2009, gave priority to roads, education and health, bringing education up 26.4 % to 19.9% of the total budget. In particular funds were allocated for completing the construction of twenty high schools and 2 900 classrooms. Books and desks are also mentioned. Whether this expenditure can be fully realised in current economic circumstances is uncertain, but the intention is clear.

Basic Facts and Figures about Zambia

Population: 12 million
Surface area: 752 000 square kilometres
Main economic activities: agriculture, mining (copper and cobalt) and tourism
GNI per capita US\$630 (2008)
Official Language: English (some 70 national languages)
Rainfall: 750 – 1300 mm per year (Nov – Apr)
GDP Growth 4.9% average (2001 -2008)
64% live below the poverty line
Human Development Index 0.481 (2007) ranked 164
Adult HIV prevalence rate 14.3% (2007)
Primary School Completion Rate: 84% (79% female)
Secondary School Gross Enrolment Ratio 36% (33% female)
Tertiary Education Gross Enrolment Ratio 2.3% (1.5% female)

Despite these commendable efforts by government, it is clear that much of the demand for secondary education has gone unmet. In the absence of any alternative for young Zambians, something like a voluntary social movement has emerged in terms which teachers provide afternoon classes at secondary level, for a fee. These parallel schools, going under the unfortunate name of Academic Production Units (APUs), first emerged in the Copperbelt Province in the 1990s, but soon mushroomed countrywide. APUs in effect replaced Open Secondary Classes which the then National Correspondence College had set up but was not able to sustain because its funding from government was cut and tutors could no longer be paid by the College. It appears that by 2008 some 90 000 of those learners who sat the grade 9 examinations were in APUs or their equivalent. Perhaps half as many were candidates in the grade 12 examinations. These numbers suggest that some 300 000 learners could be enrolled in an Open School – if one existed - and give us an indication of the extent of the market for alternative secondary education.

A rough estimation of the budget of an APU suggests that with 800 learners each paying K450 000 per year (about US\$100), the school would have an income of K360 million, of which K192 million would be spent on 14 teachers and a coordinator to provide three hours of tuition during weekday afternoons. The balance of K168 million would hopefully be spent on books, but rumours, and an official investigation in 2007, suggest that schools make other use of such funds, for instance for the transportation of teachers, bonuses , etc. No doubt there are some good and effective APUs. However, it is perhaps not surprising that one official described them as 'legitimised robbery'.

The phenomenon of APUs was studied in 2004/5 as part of a larger study, the Zambia High School Sub-Sector Review, conducted by the University of Wolverhampton. It was found that because of low quantities of learning materials, poor teaching standards, and little quality control, most learners were not being well served by APUs. A system of open leaning centres managed by the school

boards, with good materials, paid tutors, and supervision by the Directorate of Distance Education (DODE) through its provincial and district offices was recommended.

DODE duly set about developing open learning materials for upper basic education (grades 8 and 9) and high school (grades 10 – 12). With the assistance of a consultant teams of staff members wrote the first modules, which were commercially printed, and in 2006 DODE launched a pilot alternative secondary education programme for both phases. Due to lack of capacity at the DODE headquarters, this programme was in 2008 transferred to ZACODE, successor to the National Correspondence College. A general system to transform or regulate APUs has, however, not been implemented.

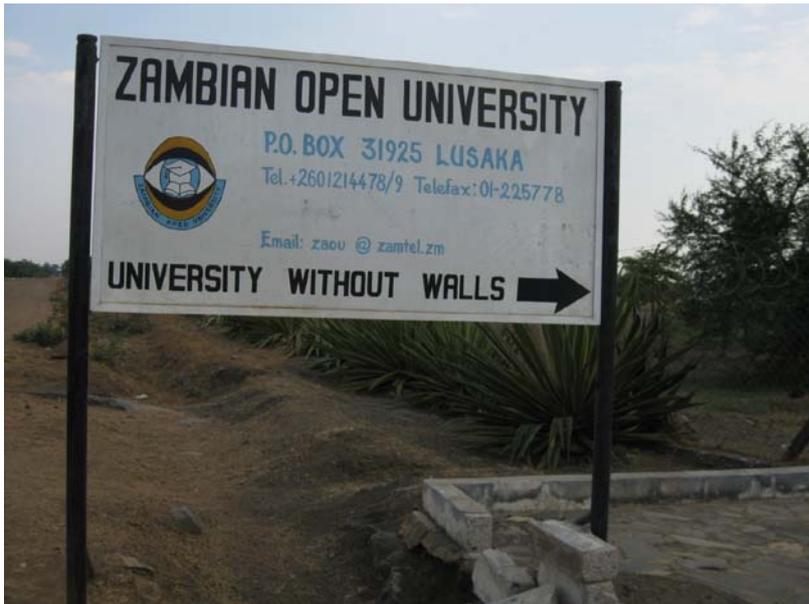
2. The country has good experience and capacity in Open and Distance Learning

The perplexing thing about the current state of alternative secondary education in Zambia is that the country has a record for innovative and effective use of open and distance learning.

At the time of independence in the 1960s, when the need for secondary education was even more acute than now, the Correspondence Course Unit at Luanshya (an offshoot of the famous Evelyn Hone College) served the needs of an emerging elite in Zambia and notable exiles from other Southern African countries, making of that town a household name. The concept of using radio broadcasting and some residential tuition was there from the beginning though frustrated in its implementation by lack of funds. The Unit was renamed the National Correspondence College in 1976, and enrolled 1750 learners in 1981. The shift in approach in the mid-1980s, to supporting study groups meeting in schools pushed up participation to 33 000 in 1985, but ultimately could not be sustained due to the economic conditions of the time. As a result, the College, renamed, the Zambia College of Distance Education in 2000, effectively reverted to a correspondence mode of tuition, with 500 – 1300 'directly enrolled' learners per year. ZACODE thus survived, but in an emaciated state.

The University of Zambia has had a distance education programme from its inception, currently offering six degree programmes, providing for an unknown number of the 11 500 students currently enrolled at the University. Similarly, since 2001 the Ministry of Education, in the form of the National In-Service Teachers' College, operating through the colleges of education, has successfully trained three cohorts of primary school teachers using distance learning. The third cohort of 4 420 students was enrolled in 2006.

The most interesting phenomenon in Zambian higher education of late, however, is the Zambian Open University (ZAOU). Established without government subsidy in 2002, ZAOU had 5 064 students in 2009, mostly in education, law and social studies. ZAOU generates its own study materials, which comply with the curricula of the University of Zambia.



Operating from a farm house on a plot behind Lusaka's industrial area, ZAOU is now about to put up its first building. It has, however, provided learner support, including some tuition, through provincial offices.



Prof Dickson Mwansa, Vice Chancellor of the Zambian Open University and former Dean of the Faculty of Education at UNZA. He is planning to start a new company to offer distance education at high school level.

Educational Broadcasting, and especially radio, has long been employed in Zambia to enhance schooling. The most acclaimed and successful project in this regard has been the Interactive Radio Instruction project, funded by USAID, which has supported primary learners, particularly in community schools.

Resources such as ischool.zm similarly demonstrate that Zambia is developing a capacity to exploit new media, as they become accessible, for enhancing formal education.

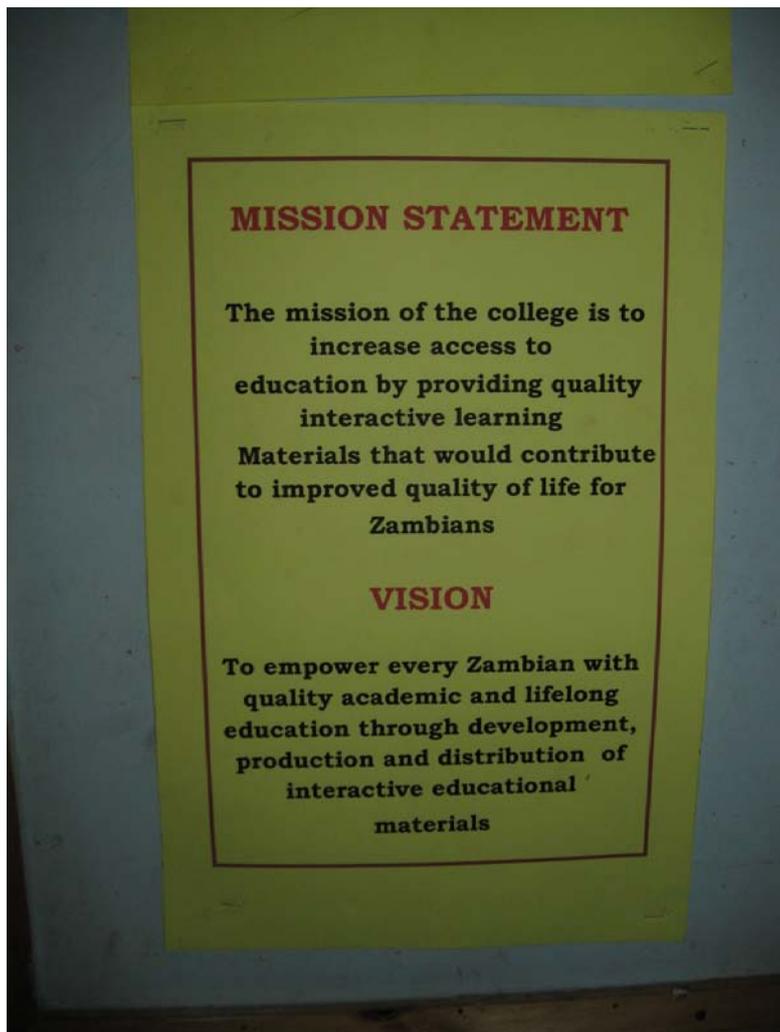
Zambia has supported its own Cooperative College, which has used ODL to train staff in agricultural and other cooperatives, since 1979.

The human capacity to support a system of Open Schooling should therefore not be lacking in Zambia. Zambians should be able to produce their own distance learning materials, perhaps with some limited external facilitation to ensure that a high standard is achieved.

3. Organizational components that could make up a system of Open Schooling are currently disjointed.

It appears the main problem that must be wrestled with in providing Open and Distance Learning for Zambian learners at secondary level is the disjointedness of the components that could and should be combined to provide an effective and integrated service.

As it is currently operating, ZACODE has a primary interest in providing printed learning materials. Unfortunately its human and financial capacity prevent it from doing so adequately. It is being called upon to provide printed materials to those in pilot DODE afternoon classes (which practically speaking are not very different from APUs) but has no further involvement in how the materials are used or the progress of the learners.



The Educational Broadcasting Service, though having certain capacity and facilities, partly as a result of the Interactive Radio Project, runs as a separate section. It provides a good service to schools, and probably incidentally to those studying part-time, but at the current time lacks funds for access to radio stations, who expect a commercial rate for airtime.



Tutorial support, vital for this level of education, is in the hands of APUs and the equivalent, and has in a strange way been privatised. Due to the benefits that schools and teachers derive from this system they may provide active and passive resistance to reform unless it is handled well.

The Ministry of Education, through its DODE structures, has a supervisory presence at national, provincial and district level, but seems to lack the regulatory instruments and financial means to bring it all together in one integrated system.

Requirements to Become an Open School

The TOR require that the consultant “identify the requirements needed to become an open school such as the Namibian College of Open Learning (NAMCOL) or the Botswana College of Distance and Open Learning (BOCODOL).”

The following characteristics of NAMCOL and BOCODOL, that seem particularly relevant to Zambian circumstances, were identified by the consultant and discussed with the management of DODE and ZACODE. Readers will understand that some level of generalisation and visioning has been necessary in arriving at these characteristics so as develop pointers that could be significant for Zambia.

1. There is a strong learner support system

Although there are circumstances in which learners may succeed using only printed materials and assignments sent to a remote tutor by post or other means, this method has generally been found to result in most learners dropping out of the programme. Particularly where learners are young, do not have well-developed reading skills, and the medium of instruction is a second language, there is a necessity to provide as much face-to-face tuition as is affordable. Learners and their parents certainly demand it, as that is what they have been accustomed to in primary schools where printed materials are often scarce. However, the tuition in an open school has to be different from a formal school, as the hours are going to be fewer than in a school, perhaps 2 -4 hours per subject per week, and the teacher must learn to be a facilitator who helps learners to use the materials, marks assignments, and generally develops study skills and deals with any difficulties the learners face. A reliance on study centres, which are usually organised in schools in the afternoons, has therefore developed. They have replaced afternoon or night schools as they once were. To support such decentralised centres regional offices with mobile staff are in place. Support provided to learners also has to do with how the college is marketed, and how learners (and sometimes their parents) are recruited, advised and registered. For those learners who cannot attend tutorials in term-time, intensive full-time tutorial sessions are organised in school holidays.

2. Excellent learning resources are provided in a range of media

Although this may not be evident to a casual observer, much effort goes into producing excellent self-study printed learning materials, the main resource for learning in an open school. At an early stage examiners and their reports are consulted to understand where learners are struggling, and what is most important in the curriculum. Curricula are studied and sometimes reconstructed to arrive at the most logical way of ordering what is to be learned, so that all the steps along the way

are clear and the units build on one another so that at each session learners make progress and feel it. For each course a small team of part-time writers have to be recruited, trained, motivated and supervised, there are editors of several kinds, illustrators, layout specialists, and so on. One gratification is that OS materials are increasingly used in fulltime schools, with official approval, instead of traditional textbooks. Where economies of scale cannot be achieved for low-enrolment subjects, wrap-around study guides are provided with a good textbook. Printing has been outsourced to competing companies, and is timed so that all materials are always available to be handed over to learners on the day of registration. Computerised systems track complex stock movements. Logistics, partly using private contractors, are well oiled.

Radio and television are increasingly being used, through commercial agreements with public and private broadcasters. Some content is conveyed. But perhaps more importantly, encouragement is provided to learners, and the public standing of the college enhanced. New media such as mobile phones are also being used. Listeners to a radio programme might be invited to provide an answer to a question by SMS to be in line for a prize. Reminders of a due date, or notification that tutors have been paid, can be sent out by SMS. Some courses are already available on the web, or on CDs, so that those who have access to the technology can use them. Expertise is thus being developed for a not too distant time when access to the internet is as pervasive as the mobile phone is today.

3. There is a quality assurance system

High standards are achieved because of the quality of staff that have been employed, the training that has been provided according to a well-researched staff development plan, and the performance management system that is in place. Key instruments, such as a house style manual and a marketing policy, are rigorously implemented. There is a quality assurance policy and standards are in place for key processes and activities. The implementation of the standards is audited and such reports are discussed by management so as to achieve improvements.

4. There is sufficient management and other capacity to make an impact

In consideration of the many young people who are unemployed, and who could improve their lifetime earnings, livelihoods and social conditions if they had completed secondary education, there is a widespread national consensus that quality open schooling must be provided on a scale commensurate with the numbers of young men and women who cannot continue with their education by formal means, and who want to return to education for various reasons relating to work or family circumstances. Since open schooling only becomes cost-effective when economies of scale are achieved, the government is willing to make an upfront investment, to a small extent in buildings, but mainly in key professional staff and programme development, and later in providing sufficient learner support, so that the open school can operate on a worthwhile scale, within the means available. There is a funding formula in place to take account of what disadvantaged learners and their families are able to pay, and ensure that open learning is not more expensive than formal education. Public-private partnerships, and international or regional institutional professional and institutional partnerships, have been developed as a key resource.

5. The government system of national examinations is used

The national system of secondary school examinations and certificates is used, so that candidates coming through open schooling emerge with the same qualifications as others, and if they are young enough may regain entry into the formal system. However, some forty percent of the candidates sitting for an examination may be from the open schooling system. This adds greatly to the pressures on the examination authority and its administration. Long and careful discussions have therefore taken place to solve the many problems relating to fees, registration processes, accurate continuous assessment marks, time and place of writing, provision of results by electronic means, and other matters of this kind. Sudden decisions and actions are avoided.

6. There is dependence on government funding, but increasing self-generation of funds

Since the intention is to make secondary education accessible to disadvantaged young citizens, almost all of whom are unemployed, government subsidy covers 80 – 90 percent of the actual cost of the courses offered, the remainder being made up by learners and their parents or guardians. However, funds are also generated by sale of course materials to the formal education system, though the usual process for the acquisition of textbooks. Funds are also generated through consultancies and education service provision won on the open market. The latter includes a contract from government to increase the supply of learners who can gain access to tertiary education in the sciences.

7. Professional, vocational, skills and livelihood programmes are increasingly emphasised

Training in ICTS is increasingly provided, for instance for the International Computer Driving Licence. Literacy and extension workers in government are trained through the Certificate in Education for Development, and related higher qualifications. The Commonwealth Diploma in Youth Development Work is offered. A Certificate in Local Government Studies is well supported, and future offerings include a Certificate in Early Childhood Development and a Business Management Course for small and medium enterprises. Collaboration with the Training Authority to offer vocational courses at the equivalent of secondary level continues, for instance in office practice and tourism. There is in-house capacity to research the market for future course offerings.

8. There is a high proportion of female learners

Roughly two-thirds of learners are female. Although this is not the result of design, the fact is that more young women than men find it possible to study through ODL. It should nevertheless be seen as an advantage in terms of equity. The advancement of women through education is likely to have social benefits in terms of better health and education for the next generation, while the greater participation of women in the workforce and in management can have benefits in terms of productivity. Measures are still needed to attract more young men to open schooling.

The Existing Structure of ZACODE and its Human Resource Needs

The current structure of ZACODE resembles that of a high school in terms of its posts and the way they are graded. There is a principal as the head of the institution, and staff components for academic work and for support services. A local advisory board is active in supporting the College, but does not seem to have any expertise in open schooling or ODL. ZACODE, to all intents and purposes, is apparently supervised by the Provincial DODE office, which gives rise to anomalies as ZACODE is meant to operate nationally.

The following tables give the posts that are available and whether they are filled or not.

Post	Filled	Vacant
Principal	x	
Head of Department: English		x
Head of Department: Maths		x
Head of Department: Science		x
Head of Department: Social Sciences	x	
Senior Lecturer: English	x	
Senior Lecturer: Mathematics		x
Senior Lecturer: Science		x
Senior Lecturer: Social Sciences	x	
Lecturer: English		x
Lecturer: Mathematics		x
Lecturer: History and Civics		x
Lecturer: Geography and RE		x
Lecturer: Env Science and Biology	x	
Lecturer: Physics and Chemistry	x	
Lecturer: Commerce	x	
Lecturer: Bookkeeping and Accounts	x	

Senior Executive Officer	x	
Assistant Accountant	x	
4 Typists	3	1
4 Photocopying Assistants		4
4 Clerical Officers	2	2
1 Office Orderly	x	
2 cleaners	1	1
1 watchman	x	

At the time of the consultant's visit, twenty staff members were present, of whom eight were women.

What is evident from this staffing position is that certain subjects, such as Mathematics, are not being covered, while many subjects or areas are being looked after by lower rank staff members who hold teaching diplomas. Funds are not available for the farming out of work, and lecturers are therefore doing all writing and editing of course materials.

The cost of the staff members on board, in terms of their salaries is approximately K50 million per month or K600 m per year (about US\$133 000 per year.) Additional provision is made for printing costs. However, the College has no transport whatsoever. At the time of the consultant's visit materials were stacked about waiting for provinces or centres to come and fetch them.



ZACODE Lecturer

At the time of the consultant's visit ZACODE had 1332 active learners who had enrolled directly with the college. Learners are able to enrol at any time and are considered active if they still have modules to complete. The College is therefore currently administering two programmes, its own earlier programme for Junior Secondary and GCE O levels, and the Alternative Upper Basic and

Alternative High School Programmes that were partially developed by DODE in 2006 and transferred to ZACODE in 2008.

This gives a breakdown as follows.

Course	Male	Female	Total
Junior Secondary	357	179	536
GCE O level	481	227	708
Alternative Upper Basic Education	13	6	19
Alternative High School Education	46	23	69
Total	897 (67%)	435 (33%)	1332

It is difficult at this point to explain the gender imbalance. ZACODE does keep records of its learners in a tray filing system, but it would seem that the tedious task of researching the ages and employment status of learners has not been done recently. (Learner records are not on a computer.)



ZACODE Lecturer

The Pilot Alternative Upper Basic Education Programme (grades 8 and 9) was launched in March 2006, by DODE, for 3 000 learners in 60 centres. The centres are at schools. The staff of the school effectively run the centres. Similarly, the Pilot Alternative High School Programme (grades 10 – 12) targeted 1 000 learners in 20 centres. At the time materials had been produced for grade 8 and for grade 10, and were commercially printed. When this was found to be expensive it was decided that

the reproduction and distribution of materials should rather be done in-house by ZACODE, using photocopy (Risograph) machines (on A4 size paper).

At the time of the consultant's visit ZACODE had managed to reproduce grade 8 modules in the following numbers: English 3 078, Mathematics 2 405, History 2 748, Geography 2320, Civics 2 370, and Environmental Science 2 708. This number would seem to be too few for the intended number of learners, given that most courses have two modules at this level. Grade 9 modules are not being produced. One therefore wonders what has happened to the learners who completed the grade 8 course in 2006, 2007 and 2008, and who were entitled to expect that grade 9 materials would be available for them.

Similarly, ZACODE had managed to reproduce grade 10 modules in the following quantities: English 1 430, Mathematics 1 240, History 505, Geography 3 425, Science 911, and Commerce 2 108. Anomalies in respect of the target of 1 000 are evident. There is also no mention of modules for grades 11 and 12, which are now in demand, one presumes, as explained above. It seems they have not been written.

It was reported that modules had been delivered to fourteen DODE centres, of which six offered both upper basic and high school, three were high school only, and five upper basic only. It seems that about one third of the available stock has been delivered, and this mostly to centres on the Copperbelt or within striking distance. The rest are stacked about waiting for transport to arrive.



Laboriously produced modules await transport

An arrangement had been made by DODE that 56% of the cost of the materials should be paid to ZACODE by DODE afternoon classes that are part of the pilot programme. This amount would presumably be drawn from the fees charged to learners by the centres. ZACODE had not yet been paid anything by even a single centre. It was not clear to the consultant what administrative mechanism would be followed to transfer or account for such monies and whether or not such an arrangement would be within the rules. Such an arrangement, however, suggests that the continued production of materials at ZACODE may not be sustainable, in the absence of constant and adequate funding from central government, which is currently not assured.

It is evident that ZACODE does not have nearly sufficient in-house capacity to produce adequate quantities of materials.

ZACODE lecturers do attempt to provide some support to their directly enrolled learners, through the marking of assignments that are received through the post, and though a single mobile phone that the College has acquired.

Through the College's own initiative, classes in some computer applications are offered on site, through two small computer labs, although the College has no connection whatsoever to the internet, due to the cost which is beyond ZACODE's means.

If the characteristics of a modern open school as described in the previous section are considered then it is evident that ZACODE needs to be completely restructured. In fact, it is the whole of DODE that needs to be reorganised. It is unfortunate that because of previous austerity measures and some lack of modernisation it is necessary to make some radical proposals. These proposals are for structures needed immediately and for the next 3 – 5 years, pending the establishment of ZACODE as a semi- autonomous body.

Firstly, it is proposed that the current Directorate of Distance Education be replaced by a Directorate of Youth and Adult Learning. This new Directorate should have divisions for (a) ZACODE, (b) relations with private and semi-private adult education institutions (since there is a crying need for regulation of such bodies and for creating synergy between government and private effort), and (c) Adult Literacy (a function recently transferred to the Ministry of Education.) Correspondingly, provincial and district structures should be re-named for youth and adult learning instead of distance education as at present. The usual term 'adult learning' is also appropriate, but Zambian circumstances seem to suggest that an emphasis on youth would not be misplaced.

The officer in charge of ZACODE should thus be a Chief Education Officer or a Deputy Director. Supporting him or her should be four sections, led by two principal education officers, for learner support and materials production, the controller of educational broadcasting, and an administrative officer of equal rank. Each would probably need four senior education offices, or equivalent, to start with, and a few specialised (education) officers. A small component for clerical assistance will also be needed, for instance to ensure that computerised records are available on all enrolled learners and their progress. Printing should be outsourced. There should also be a facility to contract part-time writers, editors, illustrators, assignment setters and markers. Reference can be made to the structures of NAMCOL and BOCODOL to identify the functions that need to be considered. An investment needs to be made in computerisation. The consultant could be more prescriptive but prefers that Zambia should consider its own circumstances and decide accordingly.

Once the new structure has been instituted staff can be appointed, drawing on the current structures of DODE and ZACODE, but also bringing in new blood. Some temporary arrangements will have to be made in Lusaka for additional office accommodation, until such time as the new ZACODE head office is built. (See discussion on premises later in this report.)

An extensive in-service training programme will be needed for the new ZACODE staff members. This should be compiled based on the identified needs of existing staff members. The most effective means of doing such training would probably be to attach Zambian staff members to existing open schools. The production of study materials can be combined with training. Fellowships to the Commonwealth of Learning might be considered for senior staff members. A few younger staff members should also be considered for formal courses in ODL, such as those offered by the Indira Ghandi Open University

A national advisory body for ODL should rapidly be instituted by the Minister, for a period of say three years, drawing on the expertise that is readily available in Zambia concerning ODL, and bringing in interested parties such as employers, trade unions and persons with knowledge of technical and vocational training and examinations.

Location of ZACODE

The consultant was required to view the location of the College and assess whether it can respond to the needs of the country from its present location (physically and administratively.)

An in-situ investigation was carried out accordingly, although the consultant must admit that he is not an expert in physical facilities.

Luanshya, where ZACODE is located, is a pleasant mining town in Zambia's Copperbelt Province. It has a population of about 110 000. The China Nonferrous Metal Mining Group has just completed formalities for the acquisition and reopening of Luanshya Copper Mines, bringing hopes for a revival in the fortunes of the town.

The ZACODE building is near the town centre. It was reportedly built as a store for the Roman Catholic Church in the 1930s, hired by the Distance Education Unit in the 1960s, and eventually acquired by government for the National Extension College. The neighbours include several noisy bars and liquor outlets. The stand is almost entirely occupied by the building. (See picture on page xx.) Internal structures are almost all wooden partitions. No major structural defects were reported.

At present the upstairs part of the building provides sufficient office accommodation for a dozen professional and clerical staff, including two small computer rooms, while the ground level provides for printing, storage and learner records.

For the present low-level activities of the College, the accommodation is probably sufficient. However, if ZACODE is scaled up to respond to the extent of the need for open schooling in Zambia (some 300 000 learners) it is difficult to see how the current facility will be adequate five years from now. If experience of Namibia and Botswana is anything to go by, ZACODE will need a staff of 5 – 10 times its current size at its head office, and considerable storage space will be needed for the consolidation of printed materials before they are sent out to the provinces.

Continued location in Luanshya will probably increase inefficiencies in the production and distribution of materials. Most materials will be printed commercially in Lusaka. Then they will be sent to Luanshya for consolidation and packing, then back to Lusaka for distribution to most of the country, since Lusaka is the hub for most road transportation.

Services that ZACODE is going to need, including high-speed internet access and the maintenance of high capacity computer systems, are probably not going to be available in Luanshya, except at a cost in terms of both time and money.

The fact of being 'out of sight and out of mind' has already cost ZACODE dearly in terms of the attention and funding that it has received from central government.

It is therefore recommended that ZACODE sets about building itself a modest headquarters, on a site in Lusaka, or a nearby town such as Kabwe, with room for expansion, and that when the new

headquarters is available the current facility at Luanshya becomes a regional centre for ZACODE, serving several provinces. Alternatively it could be sold to defray costs of the new head office.



The Heidelberg Offset Printing Press at ZACODE; it has evidently not been operational for many years, but might still be useful to a skilled commercial printer.

ZACODE as a semi-autonomous body

“It seems clear that open schools work better if they are given a degree of autonomy and not run as branches of government.” (Sir John Daniel, President and CEO of COL)

The current difficulties being experienced by ZACODE would tend to reinforce this view, one that is based on extensive experience. Open Schooling needs highly competent and specialised management and staff. Many of the decisions to be made are very technical, complex, and must have a long-term perspective; they are high risk in terms of the resources to be committed and expended, and the reputation of the College that is on the line. Small mistakes can have big consequences. The kinds of delays and frustrations that are caused by complex government bureaucracy can be fatal for a distance education operation, which must be agile, learner and performance orientated.

It should therefore be the intention, in the medium term, that ZACODE should become a statutory body, in terms of an Act of Parliament. This commitment should be clearly stated in the upcoming Sixth National Development Plan.

However, there should also be a build-up to the establishment of this semi-autonomous body, so that its establishment in terms of the Act is just a step along the way in the development of a College that is already a going concern and appreciated by government. Moving rapidly from the current weak state of affairs to a parastatal would seem to be risky. There is therefore a need to immediately begin with the transformation of ZACODE, while still under government auspices. The main elements of this transformation are suggested later in the report.

One of the tasks in the transformation of ZACODE will therefore be to draft the legislation to establish it as a statutory body and to support its passage through Parliament. Although basic laws and drafting styles do differ, it will not be necessary to start with a clean slate. For instance, legislation from Namibia and Botswana can be studied to consider the compromises that have been struck, as Sir John Daniel suggests, in determining the degree of autonomy that the government is willing to allow. Some of the key issues to be decided include the institutional mandate, the processes for the appointment of a board and a chief executive, the staff establishment and their remuneration, the determination of budgets, the courses of study to be offered, the fees to be charged to learners, and reporting mechanisms. There may already be general requirements within government that relate to state-owned entities, and these will have to be complied with. Although lawyers will be required in due course it will do no harm for ZACODE staff to begin the drafting process, and for this ‘layman’s draft’ to be improved upon by professionals in due course.

Another requirement will be to draft the funding formula, a matter dealt with later in this report.

An agreement between the Ministry and ZACODE about the use of facilities, especially schools and offices at provincial and district level will probably also be needed.

Funding ZACODE and finding efficiencies

Open schooling can be cheaper than conventional schooling, without loss of quality. However, this can only be the case when sufficient investment has been made upfront in staff development, the preparation of multi-media materials, and communications technology, especially computers. The operation must also be of sufficient size to achieve economies of scale.

Open learning has a different cost structure to schools. More money is spent on printed, audio and audio-visual learning resources, and on communication technology, and less on live face-to-face tuition. There is also a cost attached to the complex administration that is required.

However, at the level of upper basic education (grades 8 and 9) learners are still going to need a lot of face-to-face tuition, because of their limited reading ability and mastery of the English language. This may mean that open schooling at this level is not much cheaper than conventional means. However, it may still be worth having an open school programme at this level if it gives access to education to learners who cannot be reached by conventional programmes.

Very often those who are the intended beneficiaries of open schooling are socially and economically disadvantaged. They have not been well served by the conventional system. A case could therefore be made that actually open school programmes should be better funded than conventional programmes, since clearly there are many obstacles to be overcome, which will require additional resources. However, the generally accepted principle is that open schooling should not be more expensive than conventional schooling.

The first step therefore seems to be to arrive at a proper estimation of what the system of formal education costs, per subject taught to a learner, at a particular phase in the formal education system. This calculation may not be as simple as it first appears, as all the overheads and sometimes hidden costs need to be included. The cost of boarding should be included, for instance.

When it comes to determining a formula by which the amount to be paid by Government to an open schooling system is determined, this cost per learner per subject at a particular phase is the logical starting point. If the fee that the learner is to pay goes to the account of the College then this amount can be deducted from the subsidy. A further deduction can be made in view of the supposed greater efficiency of open learning. However, as already indicated, it is doubtful that much cost efficiency can be achieved with younger learners, and the effect may only be expected at high school level. Even then, government should be careful of imposing such a discount (such as beyond 5 – 20%) that the quality of the programme is compromised. This will mean that eventually the programme is discredited in the eyes of its supposed beneficiaries. The only remaining variable then is for government to say how many learner and subject enrolments it is willing to fund in a year. Unless the number of learners is relatively large, perhaps at least 5 000 – 10 000, economies of scale cannot be expected.

There are other methods of determining the funding for open schooling, but most other methods are likely to end in unresolved arguments about what it costs *or should cost* to provide the service.

It seems likely that there is considerable inefficiency in the current system of ZACODE correspondence study and the APUs or DODE afternoon classes. It seems likely that there is a high drop-out rate as learners are meant to struggle on under adverse conditions for several years before they get to the national examination. The best way of investigating this would be through a tracer study, which would also provide other instructive information such as the current occupation of former learners.

Another piece of research that is needed is to determine the amounts that learners and their parents are currently paying for APUs and the like in various parts of the country, and what the target group might be willing to pay for an open school programme.

Open schooling may be able to achieve greater efficiency by doing away with the system of grades within phases that is currently applied in afternoon classes in the same fashion as for schools. Instead one could develop a course for a subject for the whole phase, for example high school mathematics, with the intention that learners complete the subject in one year. Learners would do less subjects per year, perhaps only two or three, but the chances of them dropping out before the examination would be greatly reduced. Many learners may also only want to do one or two subjects, for instance to improve their grade in a subject such as Mathematics so that they can gain admission to higher education. Youthful and adult learners tend to be very clear about why they have come back to education, and since their motivation is high the learning curve can be surprisingly steep. Already the Zambia Examinations Council is seeking to impose a limit on the number of subjects that part-time candidates can take in a year, due to the growing load on their shoulders (and perhaps also inside information about the performance of part-time candidates.)

In any case, since resources are limited, strategic choices must be made in where to focus efforts in the building up of open schooling in Zambia. Otherwise resources are going to be dissipated across too wide an agenda, without quality being achieved anywhere.

Probably the best place to start will be at the high school level, to ensure that complete courses for this phase can be offered in enough and significant subjects. However, the curriculum reform which is currently under discussion needs to be kept in mind. Careful consultation may be needed with the curriculum authorities so that one starts on subjects that are least likely to be drastically affected. Again, to achieve efficiency, one wants course materials to last for at least five years without major changes. It usually takes at least two years to develop a set of materials for a course at this level, and the course should **never** be launched until **all** the material are available. Concerning this phase there should be a discussion with Prof Mwansa, in view of his intention to offer courses at this level privately, to see if some partnership can be formed to mutual advantage.

The next priority will probably be to offer selected courses in the skills or vocational or professional areas. Close consultation will be needed with relevant bodies, especially employers, professional associations such as accountants, and TEVETA, to identify occupations where there is a high likelihood of employment or advancement for those who satisfactorily complete the courses. ICT seems to be an obvious area. School qualifications are not the answer for everyone, and open schooling can demonstrate its utility to prospective learners and government most effectively by adding to the number of the gainfully employed, or at least improving people's livelihoods.

For reasons already explained, the upper basic level of education will be the third priority. Which is not to say that it is not important. It is vital for a large number of learners, and it must be attended to once the other two priorities have been seen to.

The Way Forward

This section of the report suggests cardinal matters that may need the attention of the Ministry of Education if open schooling is to make further progress in Zambia. In conclusion, an indication of the relative timing of the various actions is suggested for consideration. Together these proposals constitute the main recommendations arising out of the consultancy.

1. Policy and Legislation

- 1.1. *Form a technical committee on ODL.* It is proposed that the Minister appoints a technical committee on ODL to advise her on policy and other matters relating to ODL and OS. This committee should be drawn not just from the Ministry of Education, but from other Ministries and institutions, public and private, that have an interest or expertise in ODL. DODE should provide the secretariat for the committee. In time the technical committee might be transformed into the council of ZACODE.
- 1.2. *Finalise a policy on ODL, including OS.* The process to formulate a policy on ODL is already under way as part of a SADC initiative. What is important at this stage is that it should include OS.
- 1.3. *Promulgate and enforce a regulation on afternoon and night schools.* It will take some time to transform ZACODE and develop a system of open schooling. In the meantime the phenomenon of afternoon and evening schools and APUs should be regulated by law so as to ensure that standards are adhered to, particularly in respect of financial accountability and materials provision, so that learners and their families get value for their money.
- 1.4. *Draft legislation for the establishment of ZACODE as a semi-autonomous body.* While the legwork for this task can be done by DODE, the advice of the technical committee may be sought. Part of this task should include the development of a funding formula for OS and the drafting of an agreement between the Ministry of Education and the future ZACODE.
- 1.5. *Ensure that the transformation of ZACODE into an Open School is written into the Sixth National Development Plan.* This plan is now in preparation. It is therefore important that it includes all necessary provisions for the transformation of ZACODE, particularly in respect of the capital investments and start-up costs that are needed.
- 1.6. *Carry out research on OS.* In particular it would seem important to carry out a tracer study to determine what has happened to learners who have made use of various routes to study out-of-school, including ZACODE, APUs, afternoon and evening classes, etc. The amounts that learners and their families are willing and able to pay for alternative secondary education needs to be sensitively investigated. The Minister and Deputy Minister may wish to visit neighbouring states to see how they are handling these matters.
- 1.7. *Develop a strategic plan for OS.* Although the policy to be developed, and this report, provide some guidelines it will be important to organise these intentions into a strategic plan that prioritises lines of action and provides a basic work plan for what is to be done by whom, by when and at what cost. COL has developed excellent resources that can be used as a resource by DODE and the technical committee.

2. Institution Building

- 2.1. Restructure DODE and ZACODE.* A restructuring of the Ministry of Education is currently under way. It is important that this opportunity to re-organise the Ministry's approach to youth and adult learning in general, and OS in particular, should be seized.
- 2.2. Deploy, transfer, appoint and locate staff.* Existing staff members should be appropriately deployed and new staff appointed in accordance with the new structure. Temporary workspace should be provided in Lusaka and elsewhere, pending the construction of the new head office. Electronic communication between staff members may be important in such circumstances.
- 2.3. Create and implement an HR Development Plan.* A training plan for all staff involved in OS should be developed and implemented as a matter of priority.
- 2.4. Form a ZACODE transformation assistance team.* As is becoming evident, the transformation of ZACODE is going to be an intensive and complex process. Transitions are messy. The Ministry may therefore consider setting up a team of senior officials, drawing on the range of specialisations available to it, to guide and support DODE in handling the process. Personnel matters may become particularly sensitive as a semi-autonomous body implies that staff members currently working for the Public Service, who choose to do so, will have to leave that employer and take up appointments with the new body. Financial and personnel rules, and a quality assurance system, need to be formulated in advance for the new body being established. Considerable marketing and public relations work also needs to be done prior to and during the re-launch of ZACODE as a new entity.
- 2.5. Provide a new head office building for ZACODE.* As previously indicated, the present accommodation of ZACODE will not suffice and a relocation to Lusaka or Kabwe is felt to be necessary. Temporary arrangements may be needed, but it is proposed that a beginning be made in the medium term to provide a modest head office building on a site where there is room for expansion.

3. Programmatic Matters

- 3.1. Establish satisfactory arrangements concerning national examinations for part-time candidates.* It is proposed that an ad hoc liaison committee be established between DODE and the Examinations Council to discuss and agree upon all matters relating to the examination of part-time candidates, including fees to be paid, places of sitting, time of year for sittings, registration processes, procedures for the release of results and their interpretation.
- 3.2. Produce a quality-assured set of distance learning resources for the high school phase.* Prior consultation with the curriculum authority will be needed to identify which subjects may be substantially reviewed. Consultation should also take place with Prof Mwansa to see if a partnership agreement can be entered into.
- 3.3. Gradually Introduce a 'best practice' open high school programme for part-time learners.* The word pilot should not be used, since there should be a clear programme in terms of which the learning programme will progressively be expanded to more and more centres. The programme must be run by ZACODE as an integrated whole system, with the support of DODE staff in the Provinces and Districts, in terms of which learners are

enrolled by ZACODE at certain centres, at a certain time of year, provided with all printed and audio materials for the year upon enrolment, and provided with tuition and other learner support. Tutors must be selected by ZACODE, trained in advance to act as facilitators and not traditional teachers, and paid by ZACODE on an hourly rate. A system must be in place to set, mark and return assignments, with all marks being centrally captured, and a proportion moderated. (This is presuming that the high school programme will be started before ZACODE becomes a semi-autonomous body.)

3.4. Develop skills and/or professional and/or livelihood and/or vocational programmes.

Careful prior consultation should take place with the private sector, TEVETA, and sectors of industry, including ICTs, to identify viable ventures for ZACODE in such areas. Public-private partnerships should be developed where possible.

3.5. Develop an adequate set of upper-basic learning resources and launch a programme at this level. The same considerations as those mentioned above will apply.

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See also websites of NAMCOL, BOCODOL, COL, Bank of Zambia, World Bank.

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