

Lessons derived from a work-integrated learning monitoring pilot at a distance higher education institution

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The objective of this paper is to share the learning derived from an action research pilot project on the monitoring of work-integrated learning. The South African higher education imperatives are outlined and perspectives on both defined competencies and/or outcomes of assessment are reviewed, as well as the more “artistic” ability derived from unexpected experiences and problem-centered/based learning. Views on developing reflective ability are presented. The research method of entails an outline of the preparation phase, an exposition of the monitoring guidelines and instrument, as well as an explanation of action research. The launch, progression and review phases are then outlined. The findings comprise a synopsis of the qualitative data derived from the monitoring reports submitted, a summary of a focus group discussion held with regional learning facilitation staff, and the reflective perspectives of the central coordinating office staff. The article is concluded with a discussion of key lessons taken from the experience and procedural proposals (Asia-Pacific Journal of Cooperative Education, 10(2), 75-98).

KEY WORDS: Work-integrated learning imperatives, work-based learning, assessment, competence, capabilities, reflection, guidelines for assessors, progress assessment instrument, action research, video conferencing briefing, independent contractors as monitors and mentoring.

Although Alderman and Milne (2005) observe that work-based learning is now a significant part of numerous higher education qualifications, the monitoring thereof is subject to much debate: “Work-based learning (WBL) is undertaken in a wide variety of higher education contexts and is increasingly viewed as a valuable, and increasingly essential, component of both the undergraduate and postgraduate student learning experience. However, the development of rigorous pedagogies to underpin WBL and its assessment is still embryonic” (Brodie & Irving, 2008, p. 11). The purpose of this article is to attempt to add to the existing body of knowledge on the subject.

In the light of their particular outcomes, some qualifications are designed to incorporate periods of work experience (real-life learning) that is integrated with academic study. Where work-integrated learning (WIL) is a structured part of a qualification, the volume (number of academic credits) of learning allocated thereto should be appropriate to the purpose of the qualification and to the cognitive demands of the learning outcome and assessment criteria contained in the relevant level descriptors. Following this expanded version of a paragraph that appears in the Higher Education Qualifications Framework (HEQF) of South Africa, gazetted as policy in terms of the Higher Education Act, by the Department of Education it is stated that: “It is the responsibility of institutions, which offer programs requiring WIL credits to place students into WIL programs. Such programs must be appropriately structured, properly supervised and assessed” (South Africa Department of Education [DoE], 2007, p. 9). Two 2004 publications of the Higher Education Quality Committee, which is a permanent structure of the Council on Higher Education (CHE) of South African, detail the last sentence of the quotation above (South Africa Higher Education Quality Committee [HEQC], 2004). The CHE is an independent statutory body, which is responsible for advising the South African Minister of Education about higher education policy matters. The HEQC, led by an Executive Director, has executive responsibility for quality promotion and quality assurance of all higher education institutions. The two sets of HEQC (2004) criteria, namely

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those for institutional audits and those for program accreditation, therefore serve as important imperatives. In summary, the HEQC's work-based learning criteria cover the following:

- Effective management and coordination, clear delineation of responsibilities and adequate provision of resources;
- Structured learning programs to accomplish the outcomes and learning agreements;
- communication between host organizations, the institution and students;
- A mentoring system (supervision in the work place) that enables the student to recognize strengths and weaknesses, develop abilities, and gain knowledge of work practices; and
- Monitoring and recording systems to regularly and systematically assess the progress and learning of students in the workplace

Please note that in this article the terms “work-integrated learning”, “work-based learning”, and “*in vivo* learning” are used interchangeably. This article aims to distil the learning derived from a monitoring pilot—formative assessment—that made use of decentralized independent contractors to monitor the work-integrated learning of students. The tutorial model, which has been in existence for more than a decade at the same distance education institution, served as inspiration for the monitoring pilot. The content of an “advanced short course in outcomes-based assessment in higher education and open and distance learning” further served as the premise for the monitoring design.

PERSPECTIVES ON ASSESSMENT

An assessment workshop by the Geraldine Rockefeller Dodge Foundation (Grant 2007) generated nine significant concepts—quoted below—and principles regarding assessment, which relate to the above-mentioned short course, namely:

- The primary purpose of assessment is to improve performance, not audit it;
- Good assessment requires being clear about mission and goals, the standards to which you aspire, and the criteria by which you would measure success;
- Therefore, it is about *measuring what matters* (i.e., if you assess what you value, others will value what you assess);
- And, necessarily, it becomes about *planning backwards*;
- Assessment that improves performance involves *feedback*;
- One tool for getting useful feedback on what matters most is the *rubric*;
- Good assessment requires a variety of measures, data, and feedback;
- Good assessment is ongoing. It is about continuous improvement. And unless we designate and protect the *time* to do this work, it will not happen; and
- Done collectively, assessment builds community.

Note that the first concept ties up with the mentoring imperative of the HEQC. Astin et al. (n.d.) support and supplement the nine principles above: “...it begins with educational values; ... is most effective when it reflects an understanding of learning as multidimensional, integrated, and revealed in performance over time; ... works best when the programs it seeks to improve have clear, explicitly stated purposes; ... requires attention to outcomes but also and equally to the experiences that lead to those outcomes; ... works best when it is ongoing not episodic; ...fosters wider improvement when representatives from across the educational community are involved; ... makes a difference when it begins with issues of use and illuminates questions that people really care about; ... is most likely to lead to improvement when it is part of a larger set of conditions that promote change; and through assessment, educators meet responsibilities to students and to the public.”

In 1990, George Miller, the educational psychologist, put forward a framework (Norcini 2003)—illustrated in Figure 1—for the assessment of *clinical competence*, that is proficiency based on actual observation of symptoms and treatment of ailments of patients (Dictionary.com). Miller, according to Norcini (2003), differentiates between “action”, which is at the top of the framework, and other factors, such as knowledge (at the lowest level), competence and performance (on the second and third level respectively). “Action” is about what happens in practice. Norcini (2003) argues that the methods of work-based assessment should target the “action” level. Care should be taken in collecting data on which a judgment is made. Data sources, such as diaries and portfolios, are recommended, but observation is also important. Burns (2008) remarks that unfortunately the assessment of the learning of students in clinical conditions is not always easy. She mentions patient participation in the assessment of interpersonal skills, but expresses reservations about the ability of patients to assess other competences.

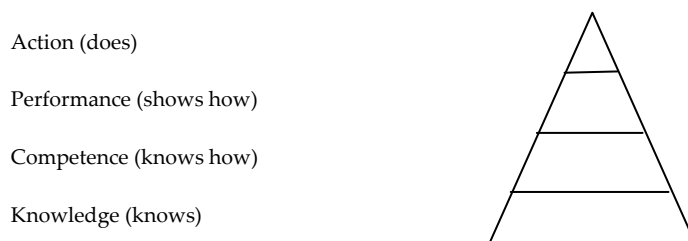


FIGURE 1
Miller's pyramid framework for assessing clinical competence

The *Making Practice-Based Learning Work* (Mulholland, n.d.) website aims to enhance the quality of student experiences whilst on practice or work-based placements. This website is the product of a collaborative project involving staff from Bournemouth, Northumbria and Ulster universities who were given a grant by the Department of Employment and Learning (Northern Ireland) and the Higher Education Funding Council for England, to make practitioners more effective in and promoting the quality of practice-based learning. In one of the many resources on this website, Allin and Turnock (n.d.) point out that assessment should be based on criteria that are known to the student, and also that assessment should be continuous—final judgment should never be based on a single incident. Gray (2001, cited in Allin & Turnock, n.d., p. 2) observes that the contemporary focus of work-based learning is on competency standards, also called “occupational and employment-related standards.” Placement or work-based learning outcomes are therefore defined by means of outcomes to be achieved by students. Assessment therefore takes on a problem-centered approach, rather than knowledge-orientation, which relates back to Norcini above. Demonstrating competency is about proving attainment of skills, not just writing about it, and assessment becomes an integral part of the learning process. Bortot, Culberson, Modak, Becan-McBride and Niemand (2004) also emphasize that students must master defined competencies. McNeil, Hughes, Toohey and Dowton (2006) are of opinion that the concept of competence has a mechanistic overtone and implies a technical skill. They prefer the notion of capability, which in addition to alluding to knowledge and skill also refers to the capacity to take effective action in untried and varying situations.

In contrast to the emphasis on outcomes and competencies, Bates (2003) argues that specific behavioral objectives cannot be specified in advance, because the moments of challenge cannot be predicted. Peterson (2004, p. 60) describes such learning opportunities as “ambiguous, messy and unclear,” and observes that students “often do unexpected and serendipitous things.” Clark (2006, p. 584) emphasizes that, in addition to “scientific dimensions of practice,” and “technical knowledge and skills of the profession,” “the so-called artistic ... the ability to grapple with the gray or indeterminate areas of practice where moral ambiguity, value conflicts, and ethical dilemmas are commonplace.” Rath (1971, cited in Bates 2003) states that the work-based learning (WBL) curriculum ought to be based on propositions about learning rather than specifically on prescribed objectives. Bates (2003, p. 303) has found that a substantial body of literature addresses curriculum design and expected learning outcomes, but that there are no studies analyzing, “how students make sense” of the workplace experience. Baxter-Magolda (1999, cited in Bates 2003) uses the term “self-authorship,” for the process that takes place as students incorporate their newfound learning into their self-concept: “Students construct knowledge as they construct ideas [that] they form about themselves” (p. 322). Bates (2003) asserts that learning is continual; that understanding often occurs some time after the initial experience; that experiences build incrementally—each experience is influenced by its own social and cultural context; and that understanding can be transformed or can occur as a critical insight. The WBL journals of students indicate that significant things may happen unpredictably during WBL and that each placement entails different challenges. Gibbs and Panayiotis (2004) to some extent echo this by arguing that the assessment practices of higher education ought not to “enframe” students, but rather liberate them by a notion of “letting them learn.” Clark (2006, p. 581) puts this well by saying, “learning is a continuous process grounded in experience, not an outcome.”

Ulmer (2001, p. 68) cautions about “patterning” instead of learning—oversimplified it results in “Give me an example of how to think and do, and I’ll think and do like you.” Ulmer (2001) argues for problem-based learning and for self-grading to achieve formative assessment. Problem-based learning is “learning that results from the process of working toward the understanding or resolution of a problem” (Barrows & Tamblyn 1980, cited in Peterson 2004, p. 1). Ulmer emphasizes that it is important that students should know how they are learning; that they should know if they are thinking critically; and that they are able to reflect on their own patterns of thought. Buchy and Quinlan (2000) have made monitoring a participatory activity through a self-assessment scoring matrix. It is said to develop the reflective thinking of students, as well as critical awareness of their own learning. Morton, Anderson, Frame, Moyes and Cameron (2006), however, have found a stark contrast between the self-assessment of students and the objective performance-based assessment of their medical procedural competency.

The literature review indicates two contrasting approaches outlined in Table 1. Note that four of the sources (Allin & Turnock; Astin et al.; Clark and Ulmer) appear on both sides, which should not be seen as direct opposites, but rather as two ends of a continuum. The purpose and nature of the qualification would determine where on the continuum assessment and monitoring should be positioned. It is further most likely that assessment may include elements from both ends of the spectrum.

TABLE 1

The assessment foci continuum

Competence	Capabilities
Particular outcomes, structured, cognitive demands and assessment criteria, credits (DoE)	Educational values, learning multidimensional, experiences (Astin et al.)
Improve performance, clear goals & standards, measuring (Grant)	Problem-centred approach (Allin & Turnock)
Performance, clear explicitly stated purposes, outcomes (Astin et al.)	Problem-based learning resulting from working toward understanding or resolving a problem (Peterson; Ulmer)
Clinical competence, proficiency based on observation, action (Norcini)	Learning opportunities are ambiguous, messy and unclear, students often do unexpected and serendipitous things (Peterson)
Criteria known to students, competency/ occupational/employment-related standards, work-based learning outcomes to be achieved by students, attainment of skill (Allin & Turnock)	Self-grading to know how learning (Ulmer)
Master defined competencies (Bortot et al.)	Self-assessment & participatory monitoring, develop reflective thinking & critical awareness (Buchy & Quinlan)
Scientific dimensions of practice, technical knowledge & skills of the profession (Clark)	Capability—the capacity to take effective action in untried and varied situation (McNeil et al.)
Patterning—example of how to think and do (Ulmer)	Specific behavioural objectives cannot be specified because the moments of challenge cannot be predicted, artistic ability to grapple with gray or indeterminate areas of practice, moral ambiguity, value conflicts and ethical dilemmas, learning is a continuous process grounded in experience (Clark)
Objective performance-based assessment of procedural competency (Morton et al.)	Proposition about learning, how students make sense of workplace experience, self-authorship, i.e. the incorporation of learning into self-concept, students construct knowledge, significant things happen unpredictably (Bates)

The purpose of monitoring (evaluation) includes obtaining information about the strengths and weaknesses of the study unit and its administration. Starr-Glass (2005) points out that it is inevitable that there will be a lack of congruence between what is actually assessed and the conceptual or latent criteria that are crucial. He furthermore cautions that evaluation will inevitably be *contaminated* by extraneous information and/or irrelevant factors, as well as *deficient* because it fails to pick up factors that are relevant but latent. When designing assessment (or monitoring) one should keep these cautionary remarks in mind.

REFLECTION

In the third last paragraph of the previous section, Ulmer's (2001) emphasis on reflecting and the development of reflective thinking by Buchy and Quinlan (2000) are mentioned. This section elaborates thereon. Reflection is about looking back and contemplating or mulling over something (Klopper, 1999). Reflection illuminates things and helps one see more clearly. According to Illeris (2002), the following two dissimilar meanings may be associated with the word 'reflection':

- *Afterthought* — reflecting on or giving additional thought to something — this contains an element of time lag in that new impulses that arise from interaction often do not happen directly. Although immediate learning is possible, the time lag is a characteristic. There is often a cognitive dissonance and at an opportune moment, an afterthought occurs. Jack Mezzrow

equates this kind of reflection to learning in one situation and applying it in another. Karl Duncker indicates that afterthoughts often manifest as problem solving that arises from the original interaction. Accommodative learning also lags behind the trigger impulses. Mezzirrow writes about *critical-reflection*, which contains an added element of the assessment of the soundness of the presumptions; and

- *Mirroring* — in line with the original optical meaning, this is an experience of something mirrored in the self. The significance of mirroring is in its focus and the fact that personal identity is used as a yardstick of reflection. The term “*self-reflection*” is often used in this sense. The inclination or ability to engage in this kind of reflection is also termed “*reflexivity*”, although there is a lack of accurate vocabulary.

Klopper (1999) differentiates between *reflection-in-action* (think about and evaluate what one is doing while doing it—developed by Schön, as form of learning and as a process of immediate reaction to a problem) and *reflection-on-action* (a post-mortem or action replay in the light of the outcomes). However, Morton-Cooper and Palmer (2000) emphasize that in order for learning from experience through reflection to become a fundamental practice, there needs to be an organizational measure, and a vehicle to facilitate such reflective learning. They recommend a recording process by means of portfolios (reflective diary or journaling) and active reviewing followed by reflection. There are three phases in reflective learning:

- Awareness or recording;
- Reviewing or critical analysis of the situation — association, integration, validation and appropriation; and
- Reflection and development of a new perspective, the outcome of which is learning

Related to the above, Clark (2008) highlights four types of writing; the first one is non-reflective, while the other three are characterized by the following different kinds of reflection:

- *Descriptive writing* (not reflective) that reports events. Its main purpose is to provide a support or a starting point for the framework of reflection;
- *Descriptive reflection* that attempts to provide reasons based upon personal judgment, such as, “I choose this problem solving activity because I believe the learners should be active rather than passive”;
- *Dialogic reflection* that forms a discourse with one's self through the exploration of possible reasons, such as, “I became aware that a number of students did not respond to written text materials. Thinking about this, there may have been several reasons. A number of students may still have lacked some confidence in handling the level of language in the text”; and
- *Critical reflection* that involves giving reasons for decisions or events, which take into account the broader historical, social and/or political context.

Against this background of the imperatives that apply, the literature review of some assessment perspectives and a brief discussion of reflection, the research methods involved in the pilot monitoring are presented next.

METHOD

For the purposes of this article, the monitoring pilot is discussed in its four phases, namely preparation, launch, progression and review. Each phase is covered in more detail hereunder. The distance education institution's tutorial model that served as inspiration makes use of decentralized independent contractors, which are managed by localized learner support staff.



FIGURE 2

Map of South Africa indicating the locations of institutional regions and offices

Suitably qualified persons are recruited to present face-to-face tutorials central office coordinates the various academic departments and the decentralized learner support staff based at institutional offices across South Africa—see Figure 2 in this regard. The country is currently divided into five regions: the *North-Eastern* region which includes two provinces, namely Limpopo and Mpumalanga; the *Midlands* region which covers three provinces, namely the North-West, the Free State and the Northern Cape; the *Cape Coastal* region which covers the Western Cape and the Eastern Cape; and *KwaZulu-Natal* and *Gauteng*. The various regional offices—indicated on the explosion segments of corresponding color as the regions indicated on the map of South Africa—are located in terms of the concentration of students.

THE PREPARATION PHASE

This phase included action planning and consultation, readying administration and contracting, academic specifications and monitoring guidelines, action research orientation, data gathering, advertising, selection, and distribution of packages to monitors who had been offered contracts. An action plan had been documented to serve as a: (a) consultation frame for participants to point out possible omissions; (b) guiding time-frame; and (c) means of informing all role players involved. The design of the monitoring was based on the recommendations in the *complete guidelines for assessors* taken from the course notes on effective assessment design and development (University of South Africa, 2008). Table 2 reflects both the recommended points and the content of the actual monitoring guidelines that were developed. Some extracts from the monitoring guidelines follow the table. Recognition was given to learning derived from the outcomes-based assessment course mentioned.

TABLE 2

Comparison of guidelines for assessment versus the actual monitoring guidelines

Recommended complete guideline points	Actual headings of the monitoring guideline
—	Introduction
—	The imperative context
Resources required	Resources required
How the assessment should be conducted	How to conduct the monitoring
Conditions of assessment	Conditions of assessment
Time limits or deadlines	Time constraints and time frame for returning the monitoring report
How the assessment instruments should be used	How to use the progress assessment instrument
Guidelines for mark allocation	—
Guidelines for using the assessment tool (rubric, checklist, etc)	—
How results should be recorded and administered	—
How feedback should be given	Feedback to the student and her (his) workplace supervisor (mentor)
Time frames for returning marked assessments and feedback	—
—	Observations about developments in the field that might in future influence the work-integrated/ <i>in vivo</i> learning of the qualification
Any other information that assessors need to know	Contribute to improving the monitoring process
	—

The introduction: Thank you for making yourself available to serve as extension of the centrally based academic staff. Your geographic proximity to a student/s undertaking her (his/their) prerequisite learning within a real-life (*in vivo*) context is important. However, more important is your subject matter expertise as practitioner in the field.

The purpose of this document is to serve as a set of guidelines regarding your role as formative assessor of the/each student's learning assigned to you for monitoring. Experience of "work," or observation thereof, does not necessary result in learning. For learning to occur, the experiences must be intentional, organized and recognized. The on-site monitoring is done with the following specific objectives in mind:

- To gather evidence regarding the learning of the student;
- To detect her (his) progress towards attaining the learning outcomes;
- To obtain the workplace supervisor's evaluation about the performance and conduct of the student;
- To mediate discretely regarding problems identified; and
- To aid the student to reflect on experiences, in order to optimize their learning.

How to conduct the monitoring: Make an appointment at a mutually convenient time, to visit each student within her (his) *in vivo* learning context at the host organization:

- Verify the relevant protocols (if any) and/or security arrangements to "visit";
- Ensure availability of the workplace supervisor (learning mentor) of each student concerned; give an indication of the duration of the visit and indicate the need specifically to interview the workplace supervisor/mentor;

- Ask the student to have her (his) completed and current reports/portfolio of evidence available during the visit for monitoring;
- Request the student to arrange a private venue for the monitoring visit; and
- Verify the location, directions and estimated time to travel to the *host* organization.

Upon arrival, introduce yourself both as representative of the institution—contracted to monitor the work-integrated/*in vivo* learning of the student concerned—and in your usual capacity. Put the student and her (his) workplace supervisor/mentor at ease and establish a rapport with both, either independently or together. Assess the situation and enquire when it would be best to interview each of them.

Engage in a discussion with the workplace supervisor, against the following background:

- The institution relies on host organizations to be partners in the education process in order to provide students with relevant and progressive real-life/work learning experiences in the field concerned. The workplace supervisor fulfils the crucial function of *mentoring* (another HEQC imperative) the student. Mentoring is a process whereby knowledge, skills, experience and professional conduct are transmitted to the student (protégé/mentee) who is under the guidance and supervision of an experienced practitioner/professional. The aim is to develop her (his) potential and to encourage her (his) personal growth. The mentor should enable her (him) to recognize her (his) strengths and weaknesses, to develop existing and new abilities and to gain knowledge in the occupational field. The mentor further assesses and certifies the student's work-integrated/*in vivo* learning report/portfolio of evidence prior to her (him) submitting it to the institution;
- Ask the workplace supervisor about the various duties the student had been required to perform and still has to perform—enquire about the quality of her (his) work; to what extent she (he) has drawn from and applied her (his) acquired academic knowledge, and has shown initiative and accepted responsibility, and has functioned as member of a team and as individual, and so on;
- Explore the nature and quality of the mentoring taking place and to what extent the student has benefited from mentoring, as well as any specific shortcomings that she (he) might exhibit;
- Ask how the workplace supervisor perceives the student's *in vivo* learning report/portfolio of evidence that she (he) had to assess and certify;
- Ask for the views of the workplace supervisor regarding the attainment of the learning outcomes by the student; and
- Make recommendations with regard to exposure that the student needs and the learning structure.

Interview the student about her (his) *in vivo* learning, and ensure that the monitoring results in a positive learning experience for the student, even if you find the student lacking, because positive feedback from an assessment encourages progress. Use the following interviewing guidelines:

- Ask the student to give you an overview of her (his) experiences—what she (he) did, observed and learned; responsibilities she (he) held, and so on. Make encouraging remarks and emphasize the student's strengths;
- Peruse the student's reports/portfolio of evidence and observe the student's progress—assess the latter in the light of the period remaining and make appropriate recommendations;
- Explore, with reference to the learning outcomes, the actual learning the student acquired—where appropriate, help the student to reflect on her (his) experiences in order to derive (or optimize) the relevant learning or add significance. Indicate where specific improvements are necessary;
- Explore what the student derived so far from the mentoring process and how it is experienced— make appropriate recommendations;

- Discuss the student's work experiences at the host organization in the light of her (his) future career plans—offer discretionary career development advice, based on your own experiences as practitioner/professional.

Conditions of assessment: Ideally, both the workplace supervisor and the student should be interviewed independently and privately. However, this is not always feasible. It is preferable to interview the supervisor first in order to get a perspective on the student's performance, but occasionally it is better to interview the student first.

Avoid any controversial issues or situations. If, as an independent contractor of the university, you are confronted with university matters, acknowledge these and undertake to convey them to the relevant regional staff member at the regional office to which you report.

Be considerate of the host organization's realities and pressures, yet be firm regarding the workplace supervisor's mentoring and assessing roles.

In order to assess actual progress, you need to peruse the student's reports/portfolio of evidence. You further need to carefully assess the nature of the student's exposure to the different areas of required experience in order to ascertain if the exposure has been adequate. Do not merely ask the student if she (he) gained the experience.

The purpose of monitoring is firstly formative assessment—to facilitate the student's learning—and secondly to gather information. Give constructive feedback: be clear, concise, honest and fair—this will encourage students and focus them on achievement.

Listen attentively and make notes during discussions in order to write a concise yet comprehensive report on the monitoring visit to each student.

If circumstances make it impossible to meet with the workplace supervisor in person, then at the very least a telephonic discussion with the workplace supervisor should take place. If it is impossible to meet the student on-site, then any suitable off-site venue will have to suffice.

How to use the progress assessment instrument: The monitoring template is straight forward to complete up to the recording of a summary of the interview and your observations. The rest is more complex.

- Record the details of the student being monitored;
- Record the details of the work-integrated/*in vivo* learning site;
- Record the details of the workplace supervisor (mentor) for the work-integrated/*in vivo* learning;
- Record what the work-integrated/*in vivo* learning of the student has entailed to date and any recommendations made in this regard;
- Record the student's progress in a table that lists the requirements;
- We recommend that this section of the monitoring report be completed after the on-site visit based on your notes taken during the monitoring visit;
- Record a summary of the discussion with the workplace supervisor (mentor) as well as your observations;
- Record a summary of the interview with the student about her (his) *in vivo* learning and in particular your feedback to the student;
- Record any observations about developments in the field concerned that might in future influence the work-integrated/*in vivo* learning related to the qualification;
- Indicate any other observations/comments/concerns;
- Record your experiences as monitor during the monitoring and critical reflection thereon;
- Write down what you experienced while doing the monitoring, as well as what you sensed and how you felt about it;

- Think about possible reasons for your own experiences and write these down;
- Record your reasons for specific actions and/or decisions with regard to the monitoring; and
- What areas/aspects do you feel should be improved? What problems need solving? How do you propose the improvements should be brought about?

Observations about developments in the field that might in future influence the work-integrated/in vivo learning related to the qualification: Serving as an extension of the centrally based academic staff it is important that you record observations about developments in the field that might in future influence the work-integrated/in vivo learning of the qualification. This kind of practitioner feedback is important with regard to keeping the learning outcomes relevant to the field of practice.

Contribute to improving the institution's monitoring process: Please keep a record of your own experiences during the monitoring process and please critically reflect on your experiences of the monitoring process.

By deliberately recording one's experiences, one is providing material for reflection. We request you to think about the possible reasons for what you perceived and to record these. Finally, we ask you which areas/aspects you feel should be improved, what problems need to be solved, and how do you propose that the improvements should be made?

These extracts above are shared with readers of this article to give an understanding of what the monitoring entailed.

Action research: The monitoring pilot was planned as an action research project, both to benefit from the improvement-cycles notion of action research and for publication purposes. A literature review about action research was undertaken and all role players were briefed and asked to keep notes. A manager asked for a template to capture experiences and/or observations and this was made available. Participants were further reminded to make use of it. As indicated in the previous section of this article, the progress assessment instrument further contained a section intended to facilitate reflection by the appointed monitors on their experiences of the monitoring and their observations.

Although some literature questions whether action research can really be regarded as research, Kemmis (1997) asserts that internationally, theorists of educational research have fostered the development of action research as a notion—it is seen as a means of connecting educational theory and practice, conducting research and improving practice. Action research facilitates the integration of theories and practice, the integration of research in an educational setting, the improvement of practice, and helps overcome the distance between researcher and practitioners in that they become co-researchers.

Action research is research with a social agenda to meet the needs of people (Van Willigen 2002). It is “a form of [collective and collaborative (Kemmis, 1997)] self-reflective enquiry undertaken by participants in social situations in order to improve the rationality and justice of their practices, their understanding of these practices, and the situations in which the practices are carried out” (Harmse 2003, p. 89).

Action research is characterized by learning derived from spiral cycles of analysis, fact-finding, conceptualization and critical reflection (Van Willigen, 2002), [reconnaissance], planning, participating in execution or collaborative-acting, observing (more fact-finding), evaluative or new critical reflecting (Erasmus 2003), then re-planning, [repetition] further action, further observations and again reflecting (Kemmis 1997). Kemmis asserts that these

points are so mechanical and procedural that they merely serve as a guide for novices. Zuber-Skerritt (2003) supports this by remarking that there is not a prescriptive recipe for action research because of the dynamic nature of real-life challenges. Louw (2003) refers to the four “moments” of action research: planning, acting, observing and reflecting. The plan is about intentional action, but it must be sufficiently flexible to accommodate unforeseen circumstances. To acting takes place in a real world, is deliberate and critical. Observing implies collecting data about action, and documenting in order to have material to reflect on. Reflecting is about recalling the action and evaluating the action with the view to taking remedial action. Improved practice and understanding of practice, as well as improvement of the situation are commonly derived from action research (Erasmus 2003).

Kemmis (1997) highlights three domains that apply to each point or phase, namely: language and discourse, activities and practices, and social relationships and forms of organization. The elements of this *action research/learning set* (Erasmus, 2003; Hammond, 2002; Seale, Wilkinson & Erasmus, 2005) comprise the following stake-holders: centrally-based academic staff, regional learning facilitation staff and contracted monitors, and centrally based professional support staff. By definition, an action learning set consists of six- ten people who meet regularly (Kalliath & Kalliath, 2003). However, the nature of this particular research situation required not only a larger number of participants but also electronic rather than face-to-face communication. Burnard (1996) suggests that both action and reflection are human attributes, but that the secret is to increase the amount of conscious reflection in order for it to become second nature. Owing to work pressures and simply having to get on with things, we often cannot afford to reflect. Burnard suggests setting aside time to reflect about what we have done and learn from the experience. As indicated above, a template had been developed for this purpose. Brown (2001) regards action research as a lived experience in which the researcher not only investigates the subject at hand but, but also document an account of the way in which the investigation both shapes and is shaped by the investigator. Such an approach calls for researcher accountability in respect of practices, outcomes and ethical responsibility, that is, the how, what and why of enacting practice.

Based on Argyris, Brown (2001) draws the distinction between Model I and II behavior. Whereas actions based on Model I behavior entail unquestioned acceptance of assumptions, Model II behavior encourages inquiry and testing. Model I is about what feels intuitively right, or “seat of the pants” actions (p. 504), that arise without reflecting on process or outcome and “unilateral control over others” (p. 507). This kind of behavior is espoused by few but practiced by many. Model II behavior leads to informed improvement of practice and results in collaborative relations, greater risk taking and freedom of choice.

Over time, action research has developed into varied degrees of participation by the persons involved in the research. Whereas in traditional research the researcher plans the “what” and “how” of the research and imposes the plan on the subjects, action research usually entails full participation of all those who take part in the process. According to Brown (2001, p. 505), the purpose of action research “is to create and evaluate change that works for all the research participants.” Action research employs the knowledge and talents of the various participants in order to yield an outcome relevant or beneficial to all involved. The participants “come together as equals in a process to craft research from inception to evaluation” (Brown 2001, p. 506).

Kurt Levin, a social psychologist who fled the repressive German regime of the 1940s and settled in the United States of America, is credited with originating action research. Levin

introduced a simple model of change to achieve a particular goal, namely unfreeze, change and refreeze. Another early proponent of action research was the Tavistock group, which formed in Great Britain after World War II. This group strived to humanize work settings through psycho-analytical and psychological principles. The Tavistock Institute was established in 1947 and was instrumental in getting people to look at the world of work from beyond a Tayloristic perspective so that workers could be acknowledged as contributing, thinking, feeling human beings rather than as cogs in a factory assembly line. Brown (2001, p. 509) recommends Heron's model of cooperative inquiry and suggests that "the researcher can produce valid inferences only when honoring full participation of all actors in the inquiry process." Heron emphasized that persons in reciprocal relationships use the full range of their sensibilities to inquire together and "coequal partnerships".

Brown (2001, p. 510) further regards research as a simple everyday process of "a problem, an inquiry process, and an explanation allowing for understanding the problem, culminating in 'actions that attempt to resolve the problem being investigated'." However, Stringer cautioned about a linear 'look-think-act' and put forward a spiral notion, in which they all happen simultaneously, yet move forward to a higher point. While one participant carries out part of some action, another gathers data and also reflects on the information in order to inform the next action level. Glittenberg (2001) emphasizes the empowerment of participants in action research.

Figure 3 reflects the Participatory Action Research Scandinavia Style Model, the co-generative research model, which clearly illustrates three integrated aspects, namely the area of concern or problem that initiates the research going, the participants (insider and outsider inquirers), and the theory-action-evaluation triangle.

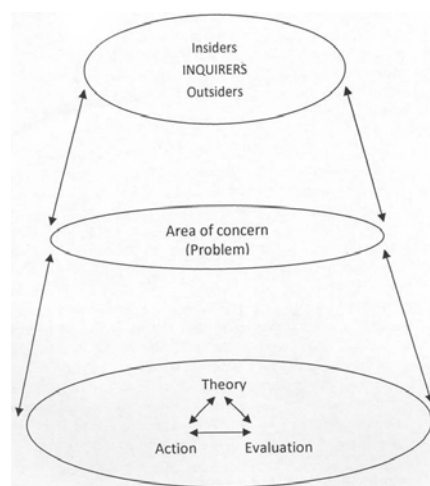


FIGURE 3

The three tier co-generative action research model (source, Brown, 2001).

Action research typically starts with someone notices a problem, for example that monitoring is not being done in accordance with the DoE and HEQC imperatives. In an attempt to find a solution, the central coordinating office alerts the insiders to the problem (the academic staff) and encourages them to consider making use of independent contractors and monitors (the

“outsiders” to the problem). Together with the regional learning facilitation staff (other insiders to the problem), the participants engage in an action research process. The double-headed arrows in the model illustrated in figure 3 speak to the interactivity of the parts of the action research process. The third part of the model contains the action research triangle of knowledge, which is theory-action-evaluation. The double-headed arrows illustrate simultaneous action. Theory is generated by each of the participants as they grapple with the problem or area of concern at hand.

Evaluation plays a very important part in action research. Evaluation is a continuous activity during action research. Glittenberg (2001) points out that evaluation starts on the first day of an action research process and ends on the last day when the participants agree that it is complete. The question, “What are we learning?” (p. 529) evaluates the process and the question “What have we learned?” evaluates the outcomes.

THE LAUNCH PHASE

This was a trying phase. In contrast to limited contributions offered or limited feedback given when consulted, several regional colleagues reacted aggressively once action had been taken. They questioned, criticized, expressed negativity and argued. It has been a “terrible experience,” and the central office felt that “the claws were out” (in the vernacular, *naels is uit*), and that their regional colleagues “were raising their hackles,” and “drawing their lips back in a snarl to expose their teeth” (vernacular, *ons kry die lip*) in aggression or an attempt at domination? Few compliments were paid and there was little positive feedback.

Time frames were very tight during this phase. After the academic colleagues concerned had made their selection of monitors, their contracting documentation was prepared for signature. In the meantime, students were allocated to selected monitors. The “regional office allocation” function of the institution’s student administrative system served as an allocation tool. Each monitor’s package contained the contracting documentation, a list of allocated students, the monitoring (assessment) guidelines, sufficient blank forms to document the monitoring, the progress assessment instruments, and the documentation for claims for services rendered. The relevant monitor packages were accompanied with a detailed memorandum addressed to the relevant regional colleagues. These packages were couriered to the various regional offices.

Regional colleagues had to call the monitors who were offered contracts; advise them about the scheduled video conferencing briefing/orientation, ask them to collect the documentation, manage the contracting, and submit the contracts. The agenda of the video conferencing briefing/orientation sessions was as follows:

- Welcome monitors and the regional staff and remind conveners to circulate an attendance register in order to arrange payment of attending monitors;
- Introduce presenters and coordinator;
- Give a very brief overview of the qualifications concerned and focus on where the WIL modules/study units fit in and what they entail;
- Explain the purpose of the monitoring visit: to gather learning evidence, detect progress towards learning outcomes, obtain the workplace supervisor’s evaluation, mediate discretely and aid the student to reflect;
- Page through the monitoring guidelines as well as the progress assessment instrument and explain how to use and complete it in terms of:
 - o details of student monitored
 - o details of the learning site

- a synopsis of student comments
- details of workplace supervisor (the learning mentor)
- recording of the monitoring done after the visit, and
- reflection on own experiences of the monitoring;
- Explain how monitors get paid and/or reimbursed, show specific documentation and emphasize how to process as well as cut off dates;
- Explain what to do if it is found that a student is outside of a geographical area;
- Explain what to do if it is found that a student is in need of a placement in order to do the prerequisite work-integrated learning; and
- Answer any questions monitors may have at the time.

The first session was a trying experience. Some regional colleagues questioned the purpose of the pilot and some queried the planned activities. The video conferencing technology had its limitations: one struggled to hear the questions raised by participants who were not seated near a microphone and there was substantial background noise at some of the linked sites. It subsequently transpired that arrangements by regional colleagues had been inadequate and that several monitors were not in attendance.

THE PROGRESSION AND REVIEW PHASES

The following problems/challenges were experienced during the progression phase:

- Regional colleagues and/or monitors complained that the contact details of students were no longer relevant and as result that the students could not be traced;
- It transpired that the institution's location details for several students was quite different from their actual geographical location;
- Regional colleagues criticized the allocation procedure/method followed to allot students to monitors and some colleagues felt the regional offices should have done the allocations;
- Some of the contract documentation arrived at the central coordinating office incomplete and/or only signed by the monitor and not by the institutional representative or witnesses;
- Incorrect documentation was used for the different kinds of claims by monitors, resulting in the central coordinating office having to go back and prepare the necessary documentation; and
- A few offices simply forwarded all the documentation and claims to the central coordinating office either regardless of the pre-arranged processes or because of staff constraints at some offices.

Of the original 43 monitors who were selected and offered contracts, only 24 contracted (44% fall out—just after 12 o'clock position to 5 o'clock position in figure 4). However, a further 11 (26%—05:00 to ±08:30) did not undertake any monitoring. A mere 13 independent contractors (30% of the original number) monitored 66 students, less than 10% of the number of students who had to be monitored.

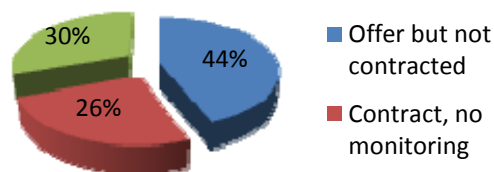


FIGURE 4

Breakdown of independent contractors involved in the monitoring pilot

The monitoring reports trickled in. More than two months after conclusion of the pilot the last three reports arrived. Despite numerous enquiries, apparently these had been stuck on a desk at one of the regional offices. All the monitoring reports were carefully studied and a qualitative synopsis was produced. A review focus group, with a number of regional staff members who were involved in the pilot, was held three months after conclusion of the pilot. The findings of this action research monitoring pilot are presented hereunder.

FINDINGS

The findings are presented under three headings: *a qualitative synopsis of the content of the reports received from monitors; the participant verified summary of a focus group discussion with regional staff; and a rundown of the moments of truth notes taken by the staff from the central office.*

A Qualitative Synopsis of the Reports Submitted on the Monitoring of Individual Students

Several monitors conveyed the appreciation of students whom they had monitored. Students and monitors experienced the monitoring visits as constructive and recommended that they be continued. Several monitors valued the opportunity to undertake the monitoring on behalf of the institution and expressed gratitude and appreciation on behalf the students they had visited. Some monitors observed that their visits to students had had an encouraging effect on students. One monitor valued the opportunity to “give back” to the industry. It is heartening to read the positive commentary about the students: “motivated, committed, willing to learn and excellent report writing skills”; “done projects for two supervisors”; “very diligent”; “received a high performance listing”; “permanently employed and registered for further study”; “the program is a nice opportunity for both the company and the student”; “the student worked his way up from operator to supervisor”; “extremely diligent with his studies and his work and is likely to be promoted”; “found the student to be competent and understood the work he needed to do”; “the student made good suggestions”; and the student “clearly understood the work he was doing and how it relates to the overall operation ... seems to take an active role and interest in improving systems”.

In one case, the student’s logbook served as point of discussion. In another case, the student, mentor and monitor discussed the student’s understanding of operations thereafter the student’s remaining work-integrated learning needs were discussed. This resulted in the identification of a specific learning need and an opportunity for the student to become involved in the solution. In another case, the student gave an outline of projects s/he has been involved in. In two cases, students took monitors on extensive tours of the industrial unit, and demonstrated a good understanding of operations, the equipment and was able to explain their operation.

In one instance, a monitor assigned himself as a mentor to several students and argued the case for monitoring (as well as for tutors and regular contact sessions) instead of reporting and reflecting on the actual monitoring of the students. He sensed their low morale and a great need for help. He concluded one progress assessment document with the words “the students ask that you please do not take monitors from them.” He also made further recommendations worth considering on how the institution could improve its distance teaching. He intervened on behalf of students, asking workplace managers to allow the students more practical exposure and arranged for the operation of certain machinery to be demonstrated to the students.

One monitor misunderstood and completed the workplace supervisor (mentor) section of the progress assessment document with his own details and answered the questions addressed to the mentor, as if they applied to him. This monitor made several recommendations to the institution from his perspective. It was found that several students did not have access to a workplace to complete their work-integrated learning. Some students were disgruntled about the lack of supervision of their work-integrated learning. One student was the most senior person at the workplace where he was supposed to be gaining experience. One monitor voiced concern about the lack of guidelines for mentors in the workplace and the fact that mentoring services—perceived as essential—were not paid for by the institution. Some students were demotivated because they have no workplace supervisors to guide and mentor them. A monitor remarked that “students should be made aware that they are the ones who should choose a mentor or supervisor”. Monitors encouraged several students in this regard. Some students were employed in an unrelated context, for example at a military base or a college/school. A monitor recommended that suitable host organizations should be identified in each region and such lists, with contact details, should be made available to students. The institution “should keep a database of such organizations,” and “students should be assisted with placements, especially where they are not working in a relevant occupational field.” One of the students who was being monitored, was unemployed and had no idea about the work-integrated learning requirements. The monitor felt that she needed assistance in arranging a suitable placement for her. Another monitor also recommended that students were assisted in getting placements.

Several monitors expressed concern about communication (another HEQC imperative related to work-based learning). There was a lot of frustration about being shunted from pillar to post by institutional staff and the difficulty in getting hold of academic staff. Some students raised specific queries, for which they were unable to get satisfactory answers. One said that she “sensed that there’s very little effective communication between the student, the [academic department] and the regional office.” The same monitor observed that students were not very clear about what was expected from them. Another monitor reported a student’s uncertainty regarding “how many projects or reports he should send to [the institution] for evaluation.” From the perspective of the students, their orientation was seen as inadequate. A monitor further suggested that students needed to learn how to write and submit a project report. In one case, both the student and mentor were confused about the difference between the logbook and the evidence file, as well as what type of evidence was required. However, the monitor resolved this. Another monitor remarked that the student had gained a good grasp of the operations at his employer. Although one of the students resigned, an interview with the past supervisor was sufficient to corroborate the account of the student. In the case of one of the students, the monitor remarked that most of her daily work was not related to her studies as it was manual and not necessarily outcomes related. A monitor suggested “closer interaction between the lecturer and the industrial supervisor.” Several monitors recommended that the expectations of the institution regarding the required work experience should be clearly communicated; this should include what was required in terms of the evidence file (as separate from the logbook). In addition, the purpose of the monitoring visit should be made clear both to the student and mentor.

Some monitors indicated that most of the students whom they had visited were keen to complete their studies although in one case a student was considering stopping his studies as his limited command of English was a serious constraint. There was some indication that other students also experienced similar communication problems.

In the opinion of a monitor there was a lot has to be done about structuring the work-integrated learning and arranging for more frequent contact between students and lecturers. It was reported that students expressed the same needs. It was proposed that there should be quarterly reviews of the students' performance and that the institution should be kept informed about students who were struggling. A monitor reported that the workplace mentor (supervisor) was proud of the student's work and appreciated his motivation. However, in another instance a monitor unfortunately observed that the relationship between the mentor and student was not good. A number of workplace mentors indicated that they would be interested in serving on an advisory committee for the qualification concerned. However, one monitor added that he would only serve on an advisory committee if paid. A monitor expressed frustration about the fact that students' contact details were often out of date and recommended that students should be asked to keep their cellphone and e-mail details up to date. A further constraint was the remote locality of some students and the difficulty monitors had in reaching them. In some rural areas students lacked Internet and e-mail connectivity. A monitor indicated that some students had not kept appointments due to illness and family related issues, for example.

One observation was made about developments in the occupational field that could influence future work-integrated learning, namely that the increased use of technology limits hands-on experience, which may impact on the understanding of operational principles. Only a few monitors reflected on their experiences doing the monitoring. One monitor felt that students needed to show more initiative in order to be granted more responsibility—“opportunities avail themselves to students who show themselves capable.” One monitor, who had initially felt a little lost, had used her initiative, made suggestions and contributed to additional learning opportunities for the student. Although a very small number of students were monitored, this pilot rendered valuable learning points with regard to the institution's obligation to monitor the work-integrated learning of its students.

Report on the Focus Group Discussion With Regional Staff

Inevitably the focus group discussion strayed to aspects of work-integrated learning other than the monitoring pilot. The following is a summary of the themes that were identified from the notes taken during the discussion and verified by the students.

Students felt that they were being disregarded

Students felt that they were being neglected and/or that they did not enjoy support from academia for the following reasons:

- They did not receive any orientation when commencing work-integrated learning;
- Contact with lecturers on work-integrated learning was unsatisfactory;
- Academic staff took days or even weeks to respond; and
- Students, however, also had to reach out.

It was recommended that discussion groups were used to enhance work-integrated learning. The outcome was that:

- One region conducted four sessions with students, each in a different geographic location; and
- Another region work-shopped students prior to placement and made contact with work-place mentors.

It was also suggested that the regional officer needed to interpret what was required in terms of work-integrated learning and that there had to be academic buy-in for monitoring to succeed.

Monitors felt solitary/forsaken/desolate

Monitors did not know which lecturer to contact if they needed help. One monitor conveyed a sense of being left alone after the initial video conferencing with there being no contact with the institution and no connection point in the region. Meetings between 'RAWILM's (Responsible Academics for Work-Integrated Learning Modules/study units), monitors and regional staff were recommended.

Learning materials were dated!

Some work-integrated learning study materials still reflected the pre-merger signage and/or referred students to the former pre-merger services/offices. This shows that the material had not been revised during the past four years since the merger between the distance higher education institutions.

The pilot was haphazard and late

The organizing of the monitoring pilot was perceived as having been chaotic and very late for the following reasons:

- Some student had already left their work-experience areas/context;
- In some cases it was no longer feasible to visit students *in situ*;
- The timing (at the end of the year) was inappropriate;
- Problems were experienced with making contact with several students;
- There were invalid contact numbers on system for several students;
- Some students were still looking for work settings to gain the relevant experience; and
- There was some concern about the suitability of some monitors. They seemed to lack confidence and presence and had been selected only on paper.

Monitors should have their own transportation

It was suggested that the appointment of monitors should be conditional on their having their own transport because without this:

- They battled when having to rely on public transport; and
- Claims and control were problematic because taxis do not issue receipts.

Logistic recommendations

It was recommended that:

- Monitors should live in the area where they would be monitoring (they should have a geographical awareness/knowledge);
- Regional staff should allocate students to monitors (not rely on the student admin system information);
- Travelling distances should be limited to, for example, a 30km radius (unfortunately this might not always be feasible in rural areas);
- Both the student and workplace mentor should sign in to confirm the duration of the monitoring visit;
- the way in which the rate of payment is calculated should be specified and the duration of monitoring visit standardized;
- The number of visits should be specified, based on the duration of the required work-integrated learning;

- The number of students assigned per monitor should be limited to a maximum of approximately 10 but should take into account the monitors' availability as well as the geographic spread of students allocated;
- The outcomes expected from work-integrated learning must be made known to the monitors if they are to fulfill a proper formative assessment role;
- The student who is monitored should complete an evaluation form; and
- The monitor's telecommunication expenses should be catered for either through an allowance for which a log should be kept or by means of claims supported by itemized billing or predetermined standard costing per student.

Recommended selection

It was suggested that the mainstream tutoring selection process should be adopted as follows:

- The regional office recruits (advertises locally) and shortlists monitors;
- Lecturer interview candidates telephonically to verify their academic credentials (some academics even test applicants); and
- Regional staff interview applicant monitors to assess their suitability.

Placements of students and host organizations

The following problems were identified:

- Some students conveyed a sense of being "dumped" and forgotten after placement, with no follow-up;
- Students expected to be paid when placed for work-integrated learning;
- It was difficult to get organizations on board to host students—some only took interns;
- Organizations often work in cycles, meaning that opportunities sometimes arise at the wrong time;
- Organizations expect support—if mentors are not briefed it may not do justice to the program. In instances where follow-up took place, organizations expressed appreciation for the care shown. It was suggested that a selling point could be accrediting host organizations/sites; and
- For some disciplines, such as agriculture, there are for example limited opportunities in urban areas.

Overburdened staff

Staff felt that they were overloaded and that there was no time for follow-up, let alone for reflection for action research purposes. They struggled with work pressure and were forced to forget about a task once it was done and move on to the next one straight away. However, one focus group participant found that since additional regional staff had been appointed, it is much easier to devote time and energy to work-integrated learning matters. Similarly, it was relief where permanent staff members were in place instead of contract staff that had to be trained afresh each time.

Further monitoring anticipated

One participant emphasized that several students had recently been successfully placed and several more were to be placed, expectations were raised, and she was looking forward to seeing monitoring taking place. Another participant was starting a process of facilitating placements and was looking forward to the implementation of monitoring.

Reflexive Perspectives of the Central Office Staff Based on Notes Taken During the Pilot

Central office staff identified the following issues that required attention:

- The advertisement for recruitment of monitors had not been sufficiently clear and had been misunderstood by some monitors who had applied—future advertisements should be phrased more clearly;
- The telephonic interaction with some applicants and/or contracted monitors gave the impression, although qualified on paper, that they were semi-literate;
- The placements (allocation of specific geographical areas and students to be monitored) had been a nightmare;
- The institution's student administration system lists of students registered for the WIL modules / study units concerned was unreliable in that:
 - o it had been difficult, if not impossible, to make contact with some students
 - o some students were unemployed and had not yet commenced with their work-integrated learning
 - o some students were located in totally different areas to those captured on the student administration system;
- Expectations were raised with the allocation of several students to a monitor, only to discover that none were “monitorable”—there was concern about the expenses incurred by such a monitor;
- Provision was not made to reimburse monitors for their telephonic expenses—this should be looked into;
- Despite several enquiries, none of those asked (including own line management, the finance staff dealing with petty cash approvals, the payroll office staff and manager or human resources) could give guidance on how to go about reimbursing monitors for travelling expenses incurred in making use of public transport—a judgment call had been made to enter the amounts paid on the institution's travel claim form. Fortunately there have not (yet) been any queries;
- Due to staffing realities at some regional offices, the collection of contracts from these offices was problematic—a staff member was not always available and some monitors were geographically removed from the relevant office;
- There had been a fair amount of confusion about the difference between monitors and mentors (work place supervisors) both among some regional colleagues and some monitors—one claimed for several hours of monitoring;
- Regional staff need to understand the requirements for an appropriately signed and initialed contract;
- In some cases, the contact information that monitors gave on their CV was incorrect or appeared to be dated; and
- Some claims for payment were processed but the full reports (completed monitoring instruments) were not submitted to the central office as specified. The claims submitted to the claims capturing office had to be supported by the first page of the monitoring report and/or other supporting documentation but the full monitoring reports had to be submitted to the central office.

DISCUSSION

The monitoring pilot undertaken during the last quarter of 2008 was a worthwhile experience in application of formative assessment theory and of facilitating reflection. Several institutional conditions presented challenges, but based on the experiences of this monitoring pilot, the following procedural proposals are made:

1. In order for monitoring to commence, both one/more *regional staff member* must declare a willingness to manage monitors and the *relevant academic staff member/s* must commit.
2. The *academic staff member/s* must provide the following:
 - a. The specifications for suitable persons to serve as monitors;
 - b. The subject matter (occupational field) input and participate in the development of monitoring (formative assessment) guidelines for monitors, as well as a monitoring instrument;
 - c. The relevant expertise and professional judgment by interviewing and ratifying monitoring candidates shortlisted by the regional staff member/s;
 - d. The necessary academic guidance by playing a part in the briefing of contracted monitors before commencing the monitoring of students; and
 - e. The purpose of monitoring visits should be explained in the learning material of WIL modules / study units, as well as in mentor guidelines.
3. The *regional staff member/s* must undertake to:
 - a. identify the relevant students in the geographical area concerned who need to be monitored, as well as their work-integrated learning locations (location of their host organizations);
 - b. recruit potential candidates to serve as monitors in accordance with the specifications provided;
 - c. design an application form, and not just rely on a CV and cover letter of motivation;
 - d. shortlist suitable candidates (after assessment in accordance with the specifications) and submit the applications of recommended candidates for consideration, interviewing and ratification by the academic staff member/s concerned;
 - e. initiate the preparation of the necessary contract documentation by the central office for the appropriate monitors to serve as independent contractors;
 - f. facilitate the necessary contracting—signed correctly and completed in full—and submit the contract documentation to the central office;
 - g. allocate students to each monitor in a radius of not more than 50km from the *domicilium* (residence) of the monitor concerned;
 - h. brief each monitor with regard to what the work entails and ensure that they understand this;
 - i. manage the work and quality of performance of each monitor;
 - j. manage the claims for payment of each monitor and submit these to the central office for coordinated processing; and
 - k. submit the monitoring documentation (*WILMonit* – instrument) for each student to the central office for processing.
4. The following conditions should apply regarding *monitors*:
 - a. The rate of payment should be the same as the hourly rate for mainstream tutors. However, the *amount will be for* making arrangements to monitor the student concerned, interviewing her (his) workplace mentor, conducting the monitoring in accordance with guidelines, and completion of the relevant documentation—there *must be no* mention of hourly rates!
 - b. Each monitor must have her(his) own private means of transportation;
 - c. The monitor must keep a log (as specified) of travelling undertaken and will be reimbursed in accordance to the institution's South African Revenue Services tariff;
 - d. Telephone and/or cellphone costs must be substantiated by itemized billing; and
 - e. Persons appointed as monitors must be prepared to take part in research undertaken on the monitoring of work-integrated learning.

Unexpected learning should be accommodated and learning evidence should not be restricted to prescribed outcomes. Although this article reflects the experience of a distance education institution, all work-integrated learning normally occurs “away” from the

institution, regardless of whether it is a residential or distance institution. The students of residential institutions are often geographically widely dispersed, which makes the notion of independent contractors as monitors a worthwhile option to consider.

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The Asia-Pacific Journal of Cooperative education (APJCE) arose from a desire to produce an international forum for discussion of cooperative education issues for practitioners in the Asia-Pacific region and is intended to provide a mechanism for the dissemination of research, best practice and innovation in work-integrated learning. The journal maintains close links to the biennial Asia-Pacific regional conferences conducted by the World Association for Cooperative Education. In recognition of international trends in information technology, APJCE is produced solely in electronic form. Published papers are available as PDF files from the website, and manuscript submission, reviewing and publication is electronically based.

Cooperative education in the journal is taken to be work-based learning in which the time spent in the workplace forms an integrated part of an academic program of study. Essentially, cooperative education is a partnership between education and work, in which enhancement of student learning is a key outcome. More specifically, cooperative education can be described as a strategy of applied learning which is a structured program, developed and supervised either by an educational institution in collaboration with an employer or industry grouping, or by an employer or industry grouping in collaboration with an educational institution. An essential feature is that relevant, productive work is conducted as an integral part of a student's regular program, and the final assessment contains a work-based component. Cooperative education programs are commonly highly structured and possess formal (academic and employer) supervision and assessment. The work is productive, in that the student undertakes meaningful work that has economic value or definable benefit to the employer. The work should have clear linkages with, or add to, the knowledge and skill base of the academic program.

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