A MANAGEMENT STUDIES CURRICULUM FOR FREE THOUGHT IN A CHANGING SOUTH AFRICAN CONTEXT: LEARNING FROM A UNIQUE EXPERIENCE

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ABSTRACT

This work is located in the unique context of the newly democratised South Africa of 1997 and comprises two phases reflecting its beginning as a Masters project and its development into a doctoral study. It seeks to answer the research question: Can we improve the learning opportunities for South African Management Studies students from African cultures and restrictive economic and schooling backgrounds, by providing them with a curriculum that promoted free thought?

The purpose of the first phase of this work was to evaluate an experience-based curriculum that was learner-centred. It aimed to meet the needs of the 'whole student' and to give the students opportunity to think freely and to achieve their potential. The evaluation, incorporating qualitative and quantitative data, formed the basis of a single case study: it explored the course's effectiveness in providing learning conditions that could promote students' personal, academic and intellectual growth from their first year of study. The purpose of the second phase was to problematise the case study, reflecting on it in the light of subsequent experience and research. This involved an exploration of the value of experience-based learning; the likelihood of the conclusions' replication, particularly within the faculty; the prospects for wider application of the case studied.

The thesis argues that experiential learning helped this group of students perform better academically than their compatriots whose learning experience was limited to a traditional university approach, suggesting that the conditions under which teaching and learning occur affect the outcome. The concept of problem-based learning was found to provide an inadequate theoretical framework since its Western cultural underpinnings are foreign to the African culture and did not provide opportunities for 'whole student' independent thought.
Since this thesis is based on a unique case study the conclusions cannot be generalisable although they are considerably strengthened in the light of students continuing to perform better over the next five years. Unless universities themselves change their approach to teaching and learning, however, it is suggested that it would be difficult to replicate these findings more broadly.
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Glossary of Terms and Acronyms

Academic development: this incorporates curriculum, staff and student development

AIDS : Acquired Immune Deficiency Syndrome
ANC : African National Congress
Apartheid : policy of racial segregation of the previous undemocratic South African government
BIS : Business Information Systems
Case study research : This refers to the research method, as distinct from cases or scenarios used as a method for teaching and learning and sometimes termed the 'case method' or 'case study method' in the PBL literature

Cases or scenarios : These refer to the hypothetical situations or narratives used as a teaching method. They were called 'case studies' initially, as reflected in some appendices and in the chapter on PBL literature

COSATU : Congress of South African Trade Unions
Curriculum : the total teaching and learning provision, as elaborated on page 86; the whole course studied
Division : the section within the Faculty of Management Studies that was referred to as a 'Programme'. The terms 'division' and 'programme' may therefore be used synonymously and signify this work's location
ELS students : students for whom English was at best a second language
EMEC Programme : Economics and Management Extended Curriculum Programme
EMS Programme¹ : Enriched Management Studies Programme
GEAR : Growth, Employment and Redistribution strategy
GNU : Government of National Unity
Grades : used interchangeably with 'marks'
HBU : Historically 'black' universities
HIV : Human Immuno Virus
HIV/AIDS : Human Immuno Virus / Acquired Immune Deficiency Syndrome
IDASA : Institute for Democracy in South Africa

¹ The name of our programme changed from EMEC to EMS in 2002
Indaba: refers to a traditional African meeting of all stakeholders, which accommodates full discussion by all, until consensus is reached.

MAF: Managerial Accounting and Finance.

Marks: used interchangeably with 'grades'.

NEPI: National Education Policy Investigation.

North or Northern: refers to developed societies of the 'North', in contrast to developing societies, and is used interchangeably with 'West' or 'Western' in this work.

New knowledge: this refers to knowledge that is new to the learner.


OBE: Outcomes-Based Education.

PBL: Problem-based Learning.

The practice: this refers to the whole designed and implemented curriculum.

The programme: This refers to the division in the Faculty of Management Studies within which the work was located.

RDP: Reconstruction and Development Programme.

SACP: South African Communist Party.

SAIRR: South African Institute of Race Relations.

SAQA: South African Qualifications Authority.

Senior students: refers to second-, third- and fourth-year students.

SWOT analysis: Analysis of a situation based on its strengths, weaknesses, opportunities and threats.

Technikon: A South African equivalent of a polytechnic.

Tripartite Alliance: The political alliance between the ANC, SACP and COSATU.

Ubuntu: aspect of African culture that holds that each person exists through (only in the context of) other people; or a person is a person because of others.


VCR: Vice-Chancellor's Review.

West or Western: refers to developed societies of the 'West', in contrast to developing societies, and is used interchangeably with 'North' or 'Northern' in this work.
INTRODUCTION

South Africa underwent a major revolution in the mid-1990s, introducing democracy and, with it, new educational opportunities. This research began in 1997, three years after the first free elections, when relatively open, democratic learning opportunities were provided for ‘our’ first-year, black African Management Studies students. The study was designed to answer the question of whether we could improve the learning opportunities provided for the students and it has illustrated that the learner-centred, experience-based curriculum affected the outcome. The students exposed to these conditions achieved better outcomes than those who were not. Consequently, in this thesis I seek to show that the implemented curriculum gave students the freedom to think and therefore to develop an 'intellectual' relation to knowledge and learning.

This introduction outlines: the research purpose, central argument and significance; the research questions, how they emerged and how they relate to one another; the research method and main conclusions. It then provides an overview of the thesis itself. For the sake of clarity, however, it first illustrates my personal, professional and research role in the case study, locating it both within the 1997 South African context and within my personal academic journey.

There are therefore three sections to this introduction: personal and professional interests; the research; the thesis structure.

Personal and Professional Interests

The personal and professional aspects of this work both had a strong bearing on the study.
Personal Interest

As a privileged white South African born into the apartheid system, I benefited from it as an ‘oppressor’ - however unwilling - and grew up in our beautiful country with a sense of guilt, shame and helplessness. Many South Africans, mostly black, had lost lives and loved-ones and suffered incarceration in the struggle against apartheid. I had done little more, however, than use my vote, attend protest meetings, write letters to the press, send my children to private multi-racial schools and work in adult literacy and tertiary academic development programmes – like the one in which this work is located.

In 1994, my feelings of guilt and despair were counterpoised with joyful pride in the country’s peaceful revolution and a determination to contribute meaningfully to its transformation. Despite huge economic, socio-political and educational challenges the mid-nineties represented a time of euphoria for most South Africans. Amongst them were the enthusiastic, energetic five with whom I worked during 1996 and 1997 in the University’s Faculty of Management Studies, to provide an emancipatory learning experience for a group of talented Black African students from appalling schooling backgrounds. They shared my optimism and excitement at our opportunity to implement a fairly idealistic curriculum, framed by early government policy and our Vice-Chancellor’s strategic plan for curriculum reform discussed in Chapter Two as a response to the broad context explicated in Chapter One.

Professional Role

As director of the academic development programme (described in Chapter Two) I had a particular interest in providing our students with an educational

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2 The team comprised (from within the programme, four participants): the course facilitator; a specialist in educational philosophy; the administrative manager and me, a postgraduate student, director of the programme and evaluator of the course. From outside the programme it included a curriculum specialist, head of the University’s academic development division.
intervention that would help them achieve good grades in all their courses. This would ensure the continuation of the bursaries they needed to escape from their inherited poverty, and which I needed for the programme's continuation, through funding by business and industry. Our work reflected the will to contribute in a small way towards South Africa's political and social transformation. The programme provided (and still provides) access opportunities for small groups (up to fifty a year) of talented, disadvantaged students.

It was exhilarating to find our academic development programme, which had started in 1989 with no state support or approval, had aims and interests reflected in emerging transformational educational policy. Approaches from academic developers in other universities and faculties and interactions at educational conferences alerted me to its uniqueness in terms of academic model, curriculum and context, since very little work of this nature had been undertaken in other South African Faculties of Commerce or Management Studies. University colleagues across faculties were grappling (or soon would be) with reforming curricula and providing foundation courses for students like ours, in line with new government goals and the opening of historically 'white' institutions to all races. At the same time our Dean repeatedly referred to the programme as a ‘flagship’ for the faculty in terms of its innovative curriculum approach (Lumby, 1997; 1999; 2000; 2002c).

We saw the legacy of centuries of racially based epistemological domination and the need to address the hegemony that prevailed in our society, in business (and in our curricula) as a barrier to our students' development into effective learners, citizens and finally business people. Based on our understandings at the time we decided to organise the course around business-related, hypothetical, realistic, topical or theoretically-based cases or scenarios that linked to concurrent course content in Accounting, Economics and Commercial Law and reflected the social complexities of this time and place. The scenarios would provide vehicles for problem-based learning (PBL).
We planned to use cases to promote critical reflection and debate on assumptions underlying the scenario or theory, to in turn promote deep understanding and elaborated knowledge, including the relationship of theory to practice, that would help students achieve good grades in their academic courses. Furthermore we believed that interactive, knowledge-constructing teaching and learning processes associated with PBL would enhance their understandings, independent thought and confidence to express their own opinions through practice in developing and defending their arguments. Moreover we saw the method as a means of promoting a learner-centred, egalitarian, democratic environment that would personally empower our students, in the sense of helping them develop self-confidence and healthy self-concepts.

Through both content and teaching and learning processes we thus aimed to provide opportunities for students to develop knowledge, capacities, attitudes and approaches that would help them achieve good grades, and implicit in this aim was our interest in developing knowledgeable, responsible, critically reflective citizens. We were aware, however, of the potential contradiction between the sponsors' expressed need for graduates who could think for themselves as effective managers with problem-solving skills, and our aim to promote criticality and problem-posing approaches to knowledge. Nevertheless, we sought to empower students to succeed academically and we aimed to do this by promoting free thought and knowledge elaboration at the start of their university studies.

We were also acutely aware of the urgency and magnitude of the challenges facing South African society and education at this time, and with our joint 'vision', values and passion, we believed we had a singular mix of attributes, knowledge and experience to develop a course of this nature. We also had a rare opportunity to work without the normal constraints of bureaucracy associated with mainstream, state-funded education and high student to staff ratios. Furthermore our various degrees of involvement in a previous
intervention would inform this more formal course development process which was being urged by the Dean of the faculty who was interested in its potential for adaptation for other groups of students. He encouraged us to develop the course very quickly and to engage in a 'learn-by-doing' process. We recommended that the course should span the first two semesters of study, and incorporate further interventions in subsequent years. The Dean required the course to be piloted as a one-semester course (team meeting notes, 15 August 1996, see below), however, because of timetable logistics for mainstream students who were potential users of the course. He was later convinced of the sense of our recommendation and adjusted the structure of the Bachelor of Commerce degree for 2004 to accommodate our first-semester course and make it compulsory for all students. Its learning principles would thereafter be integrated into the Economics curricula, also requisites to the degree, for the following three semesters.

The Research

This section discusses my research role in the course team and in the subsequent work. It also outlines the whole study.

Research Role

This work has been developmental: it reflects my progress as a practitioner-researcher from where I began as more practitioner than researcher, to an increasingly research-orientated practitioner. To promote critical reflection on our course development, implementation and evaluation processes conceptualised as part of an ongoing, iterative cyclic process, I was assigned responsibility for evaluating the course and documenting the curriculum development process. Throughout this work I refer to that documentation as 'team meeting notes'. In view of my current postgraduate curriculum studies, in fact, the team suggested that this formative assessment project could lead to a Masters research dissertation with the facilitator specifically asserting
there would be scope for it to lead onto a doctoral study (team meeting notes, 15 August 1996). In any case the documentation would facilitate a sharing of our experience with other practitioners.

In analysing our various roles the team meeting notes (13 December 1996) record the view that mine arose “out of a deep understanding of the history of (the programme), the foundation needs of students, and articulation with the needs of employers”. This was linked to my professional role of “taking overall responsibility for the quality of projects, such as this one … and (accountability) for this to the faculty, and the University, and in the current context to sponsors”.

My evaluative purpose was thus fourfold, to: inform our practice for course improvement purposes; contribute to faculty decisions about the course’s subsequent application; promote accessibility to our work; provide opportunities for a research project.

After the initial assessment of the course, implemented in the first semester of 1997, I monitored this group’s academic achievements until 2000, by which time they were expected to have graduated. This gave me the opportunity to problematise the case study, to consult relevant bodies of literature, and to discuss and write about our experience in the light of subsequent developments to the course. The thesis was, hence, developmental in nature and was reconceptualised in terms of a doctoral study.

Research Outline

The initial purpose of this research was to evaluate a unique one-semester course or module which sought to provide learning opportunities that met the needs of first-year black African students who had been deprived of good schooling. The evaluation took the form of a single case study. The justification of the findings became more significant, however, in the reflective
phase, which followed. The aim of this second phase was to look back on the curriculum studied, problematising it in terms of an African response to a rapidly changing context and the goal of promoting free thought. The two research phases represent the development of this work from a Masters dissertation to a doctoral thesis.

The thesis seeks to illustrate that the experience-based curriculum implemented in 1997 provided the type of 'whole student' opportunities to learn and to think independently that the traditional curriculum did not. Those students who were exposed to experiential learning, concurrently with traditional courses, performed better academically than those exposed to the traditional curriculum alone. Subsequent years of developing the course showed, moreover, that the unique situation of the initial curriculum implementation could be replicated in the similar contexts of the succeeding five years within our programme. This has strengthened the conclusion that the conditions under which teaching and learning occur, affect the outcome, and it has supported my hypothesis that an experience-based approach enhances learning. The thesis shows that it can accommodate the 'other-centredness' of traditional African culture in ways that Western-dominated problem-based learning (PBL) could not. At the same time the work reveals that the University context made it difficult to implement curriculum change more broadly, despite its plans to do so.

The significance of the thesis lies in its demonstration of how a holistic curriculum gives opportunities for wider learning and personal development, and the questions it asks about the conditions under which this kind of learning can occur. The questions raise issues about the nature of the University, the limitations of traditional curricula, including problem-based learning, the difficulties universities have in changing and the wider
applicability of case study research. The main research question is:

- Can we improve the learning opportunities for South African Management Studies students from African cultures and restrictive economic and schooling backgrounds, by providing them with a non-traditional, student-centred learning environment that encourages free thought, from their first year of study?

There were two sets of additional research questions, representing two distinct research phases, through which I sought to answer the principal question. They are conceptualised as two learning spirals in my academic journey, with the first demonstrating my pragmatic practitioner approach to the course evaluation in the single case study, undertaken to answer the first question:

- Was the course an effective tool for helping our students to achieve their academic potential?

This question incorporated the three sub-questions below.

*Did the curriculum promote:*

- academic growth, in terms of promoting learner competence through developing the necessary knowledge, skills, approaches and attitudes?

- intellectual growth, in terms of inducing criticality through recognising the uncertainty of knowledge, problem-posing and autonomous thought, linking 'intellectual' ways of knowing to social awareness?

- personal growth, in terms of empowering students through the development of self-confidence, self-worth and assertiveness and sharing power with them through an egalitarian, democratic experience?
These questions emerged from the newly democratised South African context, when black African students from poor schools were inadequately prepared for university education. They highlight the pragmatic nature of this work. The fact that we perceived the curriculum to be problem-based, when it was in fact more experiential in nature, foregrounds the reality of the time. South African practitioners like us were forced by circumstances to work hastily, from a base of traditional educational training and practical knowledge, with little time to plan and undertake research before implementing and evaluating new curricula.

Having answered the first set of questions through the case study, the findings were problematised. This resulted in a second set of further reflective research questions, which extended the main question, enabling it to be answered at another, more theoretical level. This represented the lifting of the study to a doctoral level. These questions are:

- *Does the theory of experiential learning provide a better framework for our practice than problem-based learning?*

- *To what extent might the findings from the case study be replicable elsewhere in the faculty or the university?*

- *Can the case study findings have wider applicability?*

The reflective questions were derived during the phase of ongoing data-gathering, in-depth reviewing of relevant literature, evaluating the 1997 course in the light of its subsequent development. During this second phase I began to explore theoretical frameworks for the curriculum implemented in the case study, universities' capacity to change rapidly and the wider applicability of case study research. Problematising the case study in this way ensured I considered the curriculum in terms of experiential teaching and learning theory. It also meant that the nature of universities was explored in the light of the practice's location within a university struggling to implement its
transformation plans, developed in response to the rapidly changing context. This raised questions about the difficulties that universities might have in implementing an experience-based curriculum. Finally, this reflective phase led to my exploring the possibilities of the case study having wider applicability, in view of the course’s subsequent developments and similar findings over the subsequent five years. These investigations thus informed the answer to this study’s fundamental question about the relationship between learning conditions and learning outcomes.

The qualitative aspect of the case study research was conducted through: student interviews; questionnaires and informal discussion over four years with the major focus in the first year; interactive critically reflective deliberations of the course team, during the course implementation, after each session; and weekly, open, democratic, critically reflective ‘house-keeping’ sessions with students. These multiple methods perhaps yielded more qualitative data than were strictly necessary for the evaluation, but the methods reflected the rushed nature of the work and limited time for careful planning. In retrospect it might have been more useful to find ways of producing the kind of data that could accommodate more in-depth analysis, like the intensive tracking of individual students’ development.

Supporting the qualitative data, nevertheless, was the statistical analysis of data in the form of examination marks, across all courses that made up the Bachelor of Commerce degree, as the 1997 intake of students progressed through their studies. The marks of students who had been exposed to the experience-based course in their first semester were compared with those who had not, over the following five years.

As a practitioner with limited research training or experience, and little time to explore alternative possibilities, I chose these obvious, common sense types of methods to evaluate the curriculum in terms of practical outcomes. This reflects a pragmatic approach by a practitioner using knowledge that was more practical than theoretical and the haste in which the case study research
was undertaken. The study, thereafter, became more reflective, demonstrating the recognition that the work might have wider significance. This involved the 'double loop' learning process (Argyris and Schön, 1974; Schön, 1983) of problematising the problem as demanded by case study research, to consider if any of the lessons learned were applicable to any other context. The second-phase, reflective research involved an exploration of the case study's implications to help me answer the main question more theoretically. It involved investigations into three areas: the effectiveness of experiential teaching and learning and their appropriateness to South African realities, including African culture, in contrast to 'West'-dominated problem-based curricula; the University's capacity to change enough to apply such curricula and what would enable departments to do so; the possibilities of generalising the case study's conclusions within other contexts of the faculty, in the light of the findings from the succeeding five courses, recognising that the curriculum could only be replicated in situations where the university was able to change its culture, structures and teaching approaches.

From the case study research phase I concluded that the course was effective in enhancing learning through its holistic approach and it did promote personal, academic and intellectual growth that together enabled students to think independently and to come closer to achieving their learning potential. The main conclusions of the research draw on the case study, supported by the findings of the following years during which this thesis was written, and take the form of hypotheses formulated during this time. First is the hypothesis that the conditions under which teaching and learning occur affect the outcome, and an experience-based curriculum can enhance learning by meeting the needs of the 'whole student'. It can thereby promote free thought and help students achieve more of their academic potential. Problem-based learning (PBL) was too narrow a concept for the practice studied in the light of its South African context and African cultural interests, whereas experience-based learning was wide enough to accommodate these realities. Experiential curriculum principles reflected a more appropriate conceptualisation of the kind of learning we aimed to promote while PBL...
framed only some of our aims. It might possibly be, indeed, that PBL is similarly restrictive to learning in other contexts.

Second, I suggest that the case study findings might not be replicable in most universities, because universities generally might be too bureaucratic to enable change and therefore to allow them to be implemented. Given a situation of change, where the university did support change or had a powerful force within it that enabled change it might however, be possible. Related to this is the third hypothesis that this unique case study might have wider applicability, particularly in our wider faculty context, in view of the curriculum’s replication over the succeeding five years.

**Thesis Structure**

The thesis is divided into four parts in order to answer the main research question about the relationship between the learning conditions and the learning outcome. It is written impersonally where it explicates context and literature, for instance, and personally to depict involvement as in ‘my’ role and reflections as professional and as researcher, and ‘our’ joint work as the team of course developers. A personal note that includes the reader is also introduced when I clarify what ‘we’ will be considering at the start of a chapter or section and explain at the end how each relates to the next.

- Part One highlights the social nature of the study focusing on the unrepeatable broad political, economic and cultural context of the time, and the University’s attempt to respond to this time of change, locating our programme and course development project within the University’s strategic transformation plans. This part thus illustrates what made the conditions, under which the curriculum was implemented, so unique, and why a non-traditional kind of curriculum was needed to help our students achieve their potential. It also highlights the difficulties the University had
in executing its plans for change. Part 1 thus provides the rationale for the case study of Part 2 and contextualises the reflections of Part 3.

- Part Two is the case study in which the research questions were initially answered. It comprises discussion of the course development, implementation and evaluation processes and seeks to answer the supporting question about the curriculum’s effectiveness in relation to its capacity to promote academic, intellectual and personal growth. It includes chapters on the research method and PBL literature since these were explored concurrently with the course evaluation, and were to lead to the second set of further, reflective research questions about experiential learning theory and the wider applicability of case study research.

- Part Three comprises reflections on the case study experience, the conclusions drawn and subsequent lessons learned as we continued to develop the course over the succeeding five years. These reflections are framed by the three further research questions that confronted me during this reflective phase. The questions relate to the value of experiential learning theory, in the light of the curriculum and the context described and analysed in Parts Two and One respectively; the replicability of the case study’s findings elsewhere in a university which had experienced such difficulties in effecting change, as flagged in Part One; the wider applicability of case study research in itself, a problem introduced in Part Two.

- Part Four draws conclusions in the form of hypotheses, based as they are on the lessons learned from the unique experience of Part Two, in the specific context of Part One and the reflections on the curriculum of Part Three. These include some unintended lessons learned through this study. It makes recommendations, necessarily tentative, about implementing experience-based curricula and the kind of changes universities might consider in order to accommodate new teaching approaches and to thereby enhance learning. Finally it analyses the
study's strengths and limitations and highlights questions that remain unanswered, suggesting areas for future research, before ending with a future vision.

Having outlined the structure of the thesis and indicated the relevance of the South African realities to an exploration of learner needs, it is now necessary to locate the whole work in its unique context.
PART ONE: LOCATING THE WORK
CHAPTER ONE

THE BROAD SOUTH AFRICAN CONTEXT

Having introduced the study in relation to my role and the time in South Africa’s history and outlined the research and thesis structure, this chapter provides an analytical description of the broad context since the 1990s, focusing on the political transformation from apartheid to democracy. The aim is to explain the complexities and the uniqueness of this time of rapid change in which the case study was located, so that the impact of the current and historical circumstances on our students, including their opportunities to learn, can be understood. The discussion hence clarifies the context for the research questions about ‘whole student’ learning, indicating educational realities and cultural issues that influenced the questions about the kind of learning conditions that could meet our learners’ needs. It also locates the case study in a time that was unrepeatable.

The situation was complex, and in order to provide a useful background for the study, the chapter is divided into three sections, which illuminate:

- the local socio-political context;
- the social and cultural context, including business and education;
- the impact of globalisation on economic and social policy, including education.

We will thus first look at the socio-political realities which illustrate the country’s time of flux, when there was both the will and the need for a peaceful revolution. This will explain the appropriateness in these circumstances of an
idealistic 'whole student', non-traditional curriculum that acknowledges the need for criticality and independent thought. The second section will enable us to explore the social and cultural realities, and the need for socio-economically and culturally marginalised learners to be personally empowered. This will explain the relevance of the case study questions to the context, and the perceived need for curricula to recognise and promote the worth of indigenous knowledge systems and cultural concepts like 'ubuntu'. In the third section we will consider how global pressures have affected local economic and social policy, restricting the state's capacity for social transformation. In educational terms this explains why conditions in 'black' schools have improved little, why the policy shifted towards skills training for the knowledge economy and outcomes-based education (OBE), why university budgets were slashed and why our learners needed a progressive curriculum within an increasingly restrictive framework.

The Local Socio-political Context

This section recalls the moral high ground and successes of the African National Congress (ANC) and the ANC-led government, and the optimism of the early days of liberation. Through this, and the subsequent discussion on globalisation pressures, I argue for the preciousness of our new democracy in the face of South Africa's undemocratic, socially unjust history. Linked to this is the need for personally empowered, critically reflective students and citizens to value and protect it, and to tolerate if not celebrate political and cultural differences. I thereby argue for the relevance of my work as both practitioner and researcher.

1994 saw the demise of apartheid rule and colonialism with the country's first democratic, national, non-racial election, and the coming into power of the previously banned African National Congress (ANC). Full-scale civil war was averted and the country set out to transform itself into a democratic, just and free society. What follows is a tracking of some of the changes in relation to
our practice and this study. The education system had to be transformed from a racially segregated and ordered one, supporting an ideology that promoted ideas of 'European superiority' and discriminated grossly against 'non-whites', particularly black Africans.

In the early 1990s there were clear signs of the imminent collapse of apartheid. Political prisoners were being released (including the future first democratically elected president, Nelson Mandela), political exiles were returning to the country and banned organisations were being unbanned. There was an atmosphere of excitement, optimism and determination to help the transformation process amongst many South Africans, including progressive educationalists. Indeed, in these times of rapid change ‘ordinary’ colleagues, associates and ‘grass-roots’ people, ignored by the apartheid regime, worked with politicians at developing new education policies in preparation for the new dispensation. They became well-known names on policy documents, moved onto parliamentary committees and even into the President’s office.

The mood in South Africa was reminiscent of the North’s romantic 1960s whose “social and philosophical atmosphere”, according to Jarvis (1985:15), after Martin, made society’s structures malleable and conducive to innovation and social change. Consultative educational reform processes, for instance, aimed at involving educationalists, community-based organisations and political and trade union organisations to develop a “full and coherent programme to place before a new democratic regime on its election” (Gerwels, 1992:17).

In 1994 the election was won outright by the alliance between the African National Congress (ANC), South African Communist Party (SACP) and Congress of South African Trade Unions (COSATU). One of the recurring

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3 ‘West’ and ‘North’ refer to developed, rich, ‘first world’ nations, in contrast to poor, ‘Southern’ ‘third world’, under-developed or developing societies, and are used interchangeably in this work.
themes in the pre-election build-up was the promise to implement the Reconstruction and Development Programme (RDP), which would provide the poor with housing, health and education. Education policies were to address both individual development needs and national goals of stimulating the economy through human resource development.

Mandela (fondly known by his clan name 'Madiba') was, and still is, widely loved and honoured. His statesmanship and personal capacity for reconciliation, after 27 years as a political prisoner, contributed enormously to achieving political transformation without civil war. He formed a Government of National Unity (GNU) through which political opponents worked cooperatively to negotiate the country's transition to democracy. In view of atrocities committed in the name of 'politics' by both sides but particularly by the previous oppressors, many of which were to be aired through the Truth and Reconciliation processes headed by Archbishop Tutu, this was no mean feat.

At this point the country experienced its 'moment of truth'. Morality and human rights were high on the political agenda. Party political differences were minimised as politicians listened to one another, showing respect for different views. For the good of the country they negotiated and compromised to develop a new constitution acceptable to all constituencies. Individual citizens, interest groups and organisations were urged to contribute ideas to promote democracy and 'ownership' of the constitution by the nation. Reconciliation and compromise were characteristic, particularly of GNU policies before the National Party (of apartheid leadership) withdrew to become the opposition. ANC politicians "consciously attempted to reconcile white and middle class elements of post-apartheid society with government reform" (Jansen, 2000:59), "watering down" original policies despite their constituency's high expectations (Sitas, 1996) in their efforts to find a way forward for the GNU.
The mood of the nation was optimistic if not euphoric, aided by the country’s re-instatement into the realm of international sport, the hosting and winning of the Rugby World Cup and the winning of the African Cup of Nations for soccer. Our victories were widely, if not completely seriously, ascribed to ‘Madiba magic’ as was our ‘miraculous’ political transformation. Walter Sisulu called it ‘the best revolution of the century’ in his tribute to the late Oliver Tambo, president of the ANC during its years of exile (Callinicos, 1996:108).

The constitution, widely considered one of the most progressive and democratic, reflected the history of most government members’ commitment to socialist ideas. These included “rights to a healthy environment, adequate housing, health care … food, water, social security, and access to basic and further education” and “the centrality of social development” to their agenda (Schlemmer and Smith, 2001:35). It also reflected the importance (and strength) of consensus-seeking and socio-political reconciliation in African culture. One participant in the process was Albie Sachs, now constitutional judge, who lost an arm to a ‘security police’ parcel bomb during the struggle. He described the constitution development process as follows:

“We fought over what we had been fighting for: the shape of the new country, the process for getting there; we fought over text; we fought over principles; we fought over responsibilities – but the emphasis was always, wherever possible, to try to get consensus, or as close to consensus as possible”

(Sachs, 1996:57).

These words were reminiscent of post structural educational theories about knowledge, power and learning processes, reflecting both the kind of thinking underpinning educational debates and the African tradition of seeking consensus. Five years later Sachs was to say: “We’re good at miracles – not so good at the ordinary” (Sebastian (3), 2001).
While optimism and determination to transform our country reigned, issues facing government included “poverty, inequality, racism, unemployment, and economic stagnation” (Wilson, 2001:3), a daunting array of challenges for even the most experienced or pragmatic of governments backed by the most flourishing economy.

The Local Social and Cultural Context

The above political transformation clearly affected South African society (including business and education) and through that my practice and research. The constitution was negotiated and accepted by interest groups as a protector of people’s rights to their own culture and language, beliefs, religions and sexual orientation. More difficult was the transformation of hearts, minds and habits of people, developed over many years in racially separated communities, under conditions of political propaganda, state control and isolation from the rest of the world. Fundamental to the apartheid ideology was a belief in the inferiority of blacks as a race, that had been uncontested by many – both blacks and whites – and festered at various conscious levels within our society.

Just as society did not change immediately racial discrimination was removed from the statute books, social justice did not prevail, economic and cultural power was not equitably distributed and schooling for black Africans therefore remained differentiated and grossly inadequate. Problems like poverty, unemployment and crime persisted, and on our campuses after six years of democracy, according to the University of Natal Student Development Plan (Rajab, 2001), students still found themselves

polarised along social, cultural, religious, political and economic lines. Products of racially exclusive school systems, they (were) strangers to each other and they (brought) to the University their particular brands of ethnic insularity in their attitudes and behaviours ranging from ethnic exclusivity to xenophobia
Archbishop Desmond Tutu coined the term ‘rainbow nation’ to represent the richness and diversity of South African society. Rajab (2001:3) referred to the potential of our range of students to “enrich a campus environment”. To harness the richness of marginalised communities and promote the kind of tolerance of difference required in our society and on our campuses, we recognised the importance of the ‘affective’ curriculum (Beane, 1994) as discussed in Chapter Two, described in Part 2 and reflected on in Chapter Eight.

A challenge to our democracy, related to cultural diversity, was the accommodation of language difference, as promoted in the constitution. While eleven different languages were granted the status of being ‘official’ the English language “spoken most often at home” by only 8.5% of the population, according to Statistics South Africa (Henderson, 2001:138), retained its power over the others. It made ‘sense’ in terms of the practicalities of participating in the world market, and furthermore, was often the only language common to all citizens, but did little to enhance equality amongst all cultures. Our classroom is a case in point. Each year there have been at least four different (African) home languages amongst our students. In no case has the home language been English, which sometimes represented the third or fourth language, yet it was the only language common to all.

So despite policies and laws to promote the identities of the different language groups and to redistribute power and control to the previously oppressed, English speakers retained their advantage and ‘status’, and self-worth was linked to capacities to communicate in English. While the language issue was not central to this study it clearly affected the needs of students for whom English was at best a second language (ESL students) and begged questions about individual empowerment and domination.
Business

Just as previously oppressed cultures and languages struggled for equality so was the business world dominated by managerial styles of the ‘North’, widely accepted as ‘best’ for operating South African businesses (Sachs, 1996:148). Since our students would end up in business and related professions, this reality was relevant to our practice and to this study. Since 1994 historically marginalised South Africans had gained political power, but economic, social and cultural power remained largely where it had been, in the minority hands of financially relatively wealthy whites. Therefore the power to define valid knowledge or valid practices, for instance in business, in the professions or in academe, rested with this group.

The consequent disempowerment of business people of African culture was thus an obstacle to the country’s transformation. This recalls Rogers’ (1992:104) argument that societies are enriched when the oppressed were engaged in “economic, social, cultural and political activities”. At the same it highlights the relevance of his argument that this involvement helps empower people with negative attitudes towards themselves, their culture or community which they have adopted from their oppressors.

To be considered effective, black Africans commonly had to become ‘white-washed’, developing views, tastes, understandings and habits associated with the dominant culture. This reflects warnings of hegemony from Barnett (1990); Freire (1994); Grundy (1987); and Jarvis (1985:59-60), quoting Giroux, about “the knowledge and values which favour the élite (being) regarded as traditional, common-sense and even self-evidently true” allowing “the dominant culture and ideology (to be) reproduced in a conservative manner”.

Hence this study’s interest in countering forces that excluded and disempowered marginalised communities (intentionally or not). In support of this focus, Odora Hoppers (2000:6) argued for a “dialogical search for integration” of South African indigenous knowledge systems, which would go
beyond “finding an aggregate position or middle ground” between ‘Western’ and indigenous knowledge frameworks, or allowing knowledge to flow in only one way (towards the disempowered). It would introduce “the power/knowledge critique and analysis of the hegemony of mainstream knowledges in terms of their silencing effects...”. She thus reflected our educational interest in personally empowering students and promoting criticality. To this end we sought to provide opportunities to recognise indigenous and personal knowledge as another ‘truth’, valuable and practical in its own context, and useful, relevant and valid for our ‘rainbow nation’ (Horsthemke, 2002; Makgoba, 2002a; Moodie, 2002; Nekwhevha, 2000; Odora Hoppers, 2000). This raises a potential source of conflict in our practice between students and their sponsors as future employers in ‘Western’-orientated organisations.

In support of this concern Baiunywa and Sejjaaka (1998) found no accommodation for the impact of different cultures on financial reporting in the accounting profession. Aspects of the training (‘from above’) of articled clerks, involving ‘high status’ knowledge, ‘respectable’ values and behaviours were based on assumptions underpinning traditions that would perhaps not stand critical examination in terms of relevance, appropriateness and validity in the new South African context. Implicit in this kind of training is control, hence the well-known paradox in lifelong learning discourse, of employers demanding critical thinking graduates, but being unable to accommodate critique of their organisation or profession. Who for instance would decide what distinguished ‘constructive’ from ‘destructive’ criticism, and on what grounds? How would this affect our graduates in South African businesses? Such questions will be re-visited in Chapter Eight.

A major challenge facing ‘Western’-dominated South African society, including business and indeed universities, is to accommodate ‘Africanness’. Mandela introduced the idea of an African Renaissance in his inaugural address of 1994, but little was subsequently made of it until Mbeki re-introduced the idea in the 1999 election build-up. The concept reflects the perceived need for an
African identity, with its own voice and integrity, embracing and empowering all cultures of the 'rainbow nation'. According to Lessem (1996:42) Don Beck, raised similar ideas in 1991. He referred to fusing the variety of African intelligences "in their natural form" with "the best of European experience to form new, exciting alloys" that could impact on individuals, businesses and the economy. Recalling Rogers' (1992) ideas on the rich contribution the poor and alienated can make, Lessem (1996:42) argued for acknowledging and combining "western-eastern (pragmatist-holist)" and "northern-southern (rationalist-humanist)" to enrich our society. He argued for the potential in the "force field of creative tension" amongst opposing social dimensions to establish unique, effective South African business practices.

The concept of 'ubuntu' (a person is a person because of others) and its associated spirit of reconciliation, sharing and communal life is a manifestation of Africa's humanism and a cornerstone of traditional African culture. Reconciliation, epitomised by the attitude of our first president, became the foundation of South Africa's attempt to build the 'rainbow nation'. This broad, inclusive approach reflected post-structural thinking, with its multi-cultural perspective and accommodation of diverse 'truths'. Underlying it was the recognition that knowledge is subjective, socially constructed, and demanding of critical reflection. Indications discussed below of a diminishing idealism, and indeed of 'ubuntu', in South African politics and society, highlight the relevance of reflecting on how to promote this post-structural relation to knowledge through new curricula.

It is ironic that 'ubuntu' and other African values were not widely harnessed and incorporated into Euro-centric South African business practices. Workers (mostly black African) are regularly accused of low productivity, yet little has been done to develop in businesses a sense of community reflecting African culture. While autocratic in nature, demanding respect for authority and elders, traditional African culture incorporates checks and balances that require the person in authority (often a chief or a family patriarch) to gain support and approval for his decisions (Ngubane, 1998a). Workers inevitably
feel marginalised in 'Western' business culture when 'consultation', if there is any, takes a form quite different from an African 'indaba' which entails a meeting of all stakeholders and accommodates full discussion by all participants until consensus is reached.

Mbigi (1992, 1995), Mgidi and Maree (1995) and Boon (1997) argue 'Western' management concepts need at least adaptation if not a paradigm shift to effect a sense of solidarity, co-operation and productivity in the South African context. Similarly, Matsvai and Nussbaum (1996:211-3), quoting Mthembu point to the process-oriented African way of doing things, communally sharing responsibilities, focusing on “harmony and people working together to achieve consensus, to build interconnectedness, and to protect individual and collective dignity”. They believe businesses seen as communities rather than “structures of power and positions” could reflect learning organisation principles (Senge, 1990). The above authors argue that story-telling and dance rituals used in African culture for education and development, promotion of harmony, expression of values and perceptions and sheer enjoyment, could be applied to business contexts. They held that such activities could work to affirm the dominated culture and to help develop a positive sense of community in business, thereby enriching South African corporate culture.

While the 'Western' world's attitude to time and competition alone makes a compromise in this direction seem preposterous, where the reality is that a minority ‘Western' business culture manages a majority of African workers, and that this majority experience the ‘Western’ approach as marginalising, it begs some consideration. Compounding the multi-cultural challenge Muendane (1995) indicates difficulties amongst indigenous African subcultures in finding a common African culture. This warning is supported by stereotypical (and some antagonistic) prejudices which new students regularly bring to our class about other ethnic groups, resulting in the strong tendency, at least initially, to befriend 'strangers' from their own tribes rather than from others.
Such realities lead to this study's question about the kind of learning conditions that can improve the learning outcomes of Management Studies students. They make sense of the case study question about the effectiveness of the course in helping learners to think through promoting not only academic competence but also criticality and personal empowerment. The context thus signals the need for further questions about the 'fit' of the experience-based curriculum framework for a course aiming to enable students to critique accepted, unquestioned and high status knowledge; to reconsider prejudicial 'learned' views and to accommodate (if not celebrate) difference.

Statistics South Africa's (2001:2) prediction that whites would make up 8% - 10% of the population in 2016, and black Africans 79% - 82% indicates the business management challenges will be faced mainly by black Africans in the future and amongst them will be our students. Chapter Seven's investigation of PBL literature reveals our intentions to push the boundaries of the PBL's work-based purpose to accommodate an emancipatory interest relevant to our context.

Education

The curriculum questions this study seeks to address were, and still are, relevant to our students' schooling experience, which influenced our perception of 'whole student' needs. Their school education was limited by the various historical 'black African' education departments' systems, racially segregated and founded on the fundamental, Calvinist doctrine underpinning what the government of 1948 called Christian National Education. As Minister of Native Affairs in 1953, the 'father of apartheid', Dr H F Verwoerd, clarified his vision (House of Assembly, 1953) saying 'natives' would be taught from childhood that "equality with Europeans is not for them". Then in a Senate debate on the Bantu Education Bill he clarified that "there was no place for
(black Africans) in the European community above the level of certain forms of labour” and that their education should be tailored to produce a workforce of manual labour (House of Assembly, 1954).

Thus apartheid education was used not only to achieve social separation but also to legitimate and entrench white hegemony with its assumptions about white superiority and black inferiority. At the same time, despite some courageous resistance, the impact of fundamental pedagogics on teacher education served to ‘deprofessionalise’ teachers, restricting their role to practitioners and implementers of given philosophies (Baxen and Soudien, 1999). The related discouragement of enquiry amongst learners was supported by the notion of respect for the views of elders in African culture.

The ANC’s Policy Framework for Education and Training discussion document (ANC Education Department, 1994:4), recognised the widespread destruction of a learning culture which had led “in the worst-affected areas to a virtual breakdown of schooling and conditions of anarchy in relations between students, teachers, principals, and the education authorities”. The document noted the reconstruction work needed to counter the legacy of apartheid which included “racism, dogmatism, and outmoded teaching practices” (ANC Education Department, 1994:11).

Our students’ school curriculum was thus both oppressing and domesticating (Freire, 1987). It was almost entirely “based on rigidly defined school subjects whose purpose was the unquestioned transmission of apartheid-determined syllabus content through rote-learning” (Kraak, 1999:23). The curriculum reflected what Knowles (1978) called a ‘content’ model of traditional educators, where the role of learners was to react to the teacher’s initiative, and what Freire (1994) called banking education. The ANC Education Department (1994:68) referred to the “focus on rote-learning and the absorption of facts rather than on the development of critical thinking, reasoning, reflection and understanding” arguing for the need for curricula to “promote independent and self-critical learning”.
The schools also suffered practical difficulties linked to enormous historical differentials in racially disparate funding of education. At the end of the 1980s the government was spending between seven and eight times more on white than black African pupils (Buthelezi, 1988/1989). To provide equal education the new government had to allocate much bigger education budgets which the economy could not support (Delavare, 1995; Woods, 2000). The 1995 White Paper agreed that the generous 22.5% of budget - 7% of estimated GDP – allocated to education in 1994 fell "considerably short of the country's educational needs" (Department of Education, 1995:57). Today these schools are still severely under-resourced.

By 2001 the situation remained critical with 85,501 unqualified or under-qualified teachers, mostly in rural primary schools (Vally, 2000). Aside from insufficient desks, chairs, textbooks, stationery, libraries, science and computer equipment and inadequate buildings, many schools still lacked telephones, electricity and water supplies. The National Schools Register of Needs Survey tabled before parliament in May, 2001 (de Souza, 2001a:274) claimed there were still 34% of schools without telephones and with no running water, and over 70% lacked a computer in 2000. According to a report by the auditor general (de Souza, 2001a:274) 93% of schools had no libraries; 94% had no science laboratories; and 25% had no toilets. According to Streek (2) (2001), 66.6% of schools had inadequate sanitation – that is, less than one toilet for 30 pupils or reliance on a bucket or pit-latrine system.

Compounding these problems, teachers were generally demoralised by poor conditions of service and widespread life-threatening political conflict in and around schools (Asmal, 1999). All this has contributed to a poor teaching culture and haphazard school hours, with the report of the auditor general (de Souza, 2001a:274) admitting "a substantial amount of teaching time was lost because of the non-compliance of teachers with official working hours".

Aside from the philosophical constraints of fundamental pedagogy, the above practical problems and cultural realities, as a "survival response" (Delavare, 1995:63), teachers adopted authoritarian, narrow textbook teaching
characterised by a content-based, transmission model of learning with rote-learning the norm (Department of Education, 1997b). Teacher-centred classrooms made learners passive recipients of knowledge, with few opportunities for interactive learning processes or personal contact between teachers and pupils. The Minister of Education, Professor Kader Asmal said:

It is important to recognise what damage was done over the decades by an approach to education that was essentially authoritarian and allowed little or no room for the development of critical capacity or the power of independent thought and enquiry


Asmal (1999) also said:

Overwhelmingly, poor learning is associated with poverty, bad or absent facilities, under-prepared teachers, lack of learning resources, and a serious lack of purpose and discipline in many schools, or what is called a culture of learning, teaching and service

(Asmal, 1999, in the section: 'Where we are failing').

The state of school education was thus widely attributed to a breakdown in professionalism and accountability. It partly reflected teachers' prioritising of further studies (to upgrade qualifications) over teaching (Delavare, 1995) and the 'Western' concept of individualism and competitiveness advancing over the traditional cultural concepts like 'ubuntu' as South African society became increasingly influenced by global, western pressures and preferences.

Impact of Globalisation

The local social demands confronting an inexperienced and poorly resourced government were multi-faceted. Compounding the challenge was the government's decision to simultaneously enter the global economy making it
practically very difficult to achieve either set of goals. This section explores the impact of globalisation in terms of the shift in economic policy and its negative impact on the socio-political context, specifically on education policy. It focuses on government goals to enter the global knowledge society and develop human capital for its economy, the consequent emphasis on technology, vocationalism and targeted disciplines, lifelong learning and OBE.

**Shift in economic policy**

Having made the political choice to prioritise our country’s entrance into the global economy over its social development promises, the government re-orientated its economic policies, adopting the new and more conservative macro-economic policy for Growth, Employment and Redistribution (GEAR). Social ideals soon became compromised as the budget deficit was slashed, conservative interest rate policies were implemented and the principle of privatisation embraced (though they failed to gain agreement on this within the political alliance).

The problems for weak economies of developing nations competing in this arena are well documented. Unsurprisingly, the level of both economic growth and foreign investment has been too low to diminish our unemployment and other social problems, despite the fiscal stringency adopted in accordance with the demands of capital markets. While the country’s debts have been paid and inflation has been reduced the country remains largely excluded from, and at the mercy of, the world economy which is controlled by the powerful players of the developed nations.

President Mbeki said in his 2001 state of the nation address: “The reality remains that our rate of growth is still too low as are the aggregate savings and investment rates” (Calland, 2002:20). The consequent minor economic adjustments were inadequate to address the problem and 2002 brings with it negotiations within the alliance (COSATU and the SACP) “suggesting that a
far greater emphasis will be placed on the micro-economy, on domestic investment and growth, and even on Keynesian-style public interventions" (Calland, 2002:20).

Social policy legislation (around issues of housing, education and health, specifically AIDS) are currently being challenged in court, with the support of COSATU, in relation to “socio-economic human rights and core values enshrined in the constitution” (Serjeant, 2002:24; Motala and Singh, 2001:8, drawing on Motala and Pampallis; Macfarlane, 2002). This situation highlights the paradoxical nature of state goals, exposes differences within the alliance and illustrates the gap between rhetoric and practice. Indeed the constitutional court is currently deliberating over the government’s appeal against the judiciary’s ‘interference’ in their social delivery plans, specifically concerning AIDS (Beresford, 2002; Haysom, 2002).

Impact on Socio-political Context and Social Policy

With the above priorities the more conservative economic policy did succeed in producing modest growth, turning around the apartheid government’s economy. With it, however, came a more pragmatic, ‘political’ and less than democratic use of power, and a shift in focus away from development programmes and job creation projects much needed by the poor.

It meant social development programmes and policies, including education, had to be implemented on reduced budgets compromising capacity to meet the poor’s expectations for redress and a better life. The high short-term social cost of the new economic strategy included reduced capacity for service delivery and job-creation. The SACP and COSATU and other ‘pro-development’ stakeholders argued this would compound social problems. Cracks appeared in the tripartite alliance resulting in typical political manoeuvring (particularly in the build-up to the 1999 general election). One serious confrontation, supported by COSATU, occurred with the teachers’
union strike to protest against retrenchments said to be aimed at promoting equity in the educational system, exposing the plan, and its implementation, as a demonstration of gross political and bureaucratic bungling. [Typical of developing societies (Rogers, 1992) 95% of education’s budget was earmarked for salaries and government sought to re-allocate salaries money for upgrading facilities].

Thus the implementation of early ideas on redressing inequities were hampered by economic realities, the new GEAR policy and political priorities. The nation’s optimism passed. Changes had been slower than South Africans (often unrealistically) expected. The economy had indeed experienced sustained growth for the first time since 1981, but it had been modest (2-3%) and largely ‘jobless’ (Chisholm, 1998). While business on the whole applauded government for its tough spending and borrowing strategy and the stability it had brought to the economy, all were concerned about the need to address unemployment problems. 39% of potentially economically active South Africans did not have jobs in 2000 (Barrell, 2000) and the development report of the United Nations Development Programme measured absolute poverty at 45% (Foscher, 2001). Even proponents of GEAR agreed that it could not address unemployment problems without sustained high rates of growth.

Dependent on both skills development and the world economy, and with its long-term aims for growth, employment and redistribution, GEAR was an insufficient strategy for the poor. According to BusinessMap’s projections (Rumney, 2001) the level of skills development achieved was insufficient for increasing economic growth from 3.5%. It required a growth rate of 6% by 1999 to stem the escalation of unemployment (Krafchik and Streak, 2001). To reach its economic development goals, South Africa needed 50,000 professionals and managers to enter the market each year (South African Institute of Race Relations, 2001).
To address poverty and unemployment plaguing South African society, redress and development needed prioritising. Poverty had persisted (Barrell, 2000; Chisholm, 1998; Kane-Berman, 2000; Krafchik and Streak, 2001; South African institute of Race Relations, 1998a, 1998b; Wilson, 2001). According to the Women's Development Bank 73% of all households received monthly incomes of less than R2,500 and 14 million people lived in poverty (Streek (1), 2001). The outstanding debt of R500 million to the 21 universities, in April 1998 (Vally and Spreen, 1998:9) was related to student loans, demonstrating society's poverty and heralding the problem of declining student intake numbers. By 2001 only 10% of the R2.3 billion owed had been collected (Maphumulo, 2001).

Clearly our students' socially and economically marginalised and disempowered status, with that of their communities, had not simply changed with the re-distribution of political power in the new democratic South Africa. Aside from education the destitute were still distressed in 2001 by inadequacies in services like health and housing. According to the Health Systems Trust, the management of the HIV/AIDS pandemic was seriously constrained by an inadequate infrastructure of the public health system (Schlemmer and Smith, 2001). Based on their preliminary assessment of a simulation model over the period 1997-2010, Channing Arndt of Purdue University and Jeffrey Lewis of the World Bank estimate a 17% reduction in South Africa's GDP from what it would have been, as a result of the HIV/AIDS pandemic (Henderson, 2001). It was increasingly ravaging communities, particularly the poor, and while statistical analyses differ, all agree the pandemic is serious.

According to the University of South Africa's Bureau of Market Research one in five deaths among black Africans was AIDS-related in 2001, and this was expected to rise to one in two deaths from 2011 onwards (Henderson, 2001). According to the Department of Health one in nine South Africans (4.7 million people) was infected with HIV in 2000 and it predicted the number would rise to 6 million by 2005 (Schlemmer and Smith, 2001), compared with ING
Barings prediction of 6 million by the end of 2000 and 8 million by 2005 (South African Institute of Race Relations, 2001a:7). According to the Unilever Institute of Strategic Marketing at the University of Cape Town, one in five workers would die from the pandemic by the end of 2010 (Henderson, 2001).

Particularly chilling is Minister of Education Kader Asmal’s warning that “the disease will have made orphans of three-quarters of a million South African children” by 2010 (Vally, 2000). A still worse scenario is predicted by the Health Systems Trust’s estimation of more than 2 million orphans by that year (South African Institute of Race Relations, 2001:7). A pandemic of these proportions will clearly divert social spending from other social welfare needs already constrained by the GEAR strategy, resulting in further widening inequalities and compounding problems of the poor. Thus the strategy with its related shift in focus from social delivery, including the President’s luke-warm and confusing response to the AIDS crisis and the cause of HIV/AIDS (Schlemmer and Smith, 2001) has brought costs to the economy.

At the other end of the economic scale has been emigration of financially resourced South Africans in response, inter alia, to the extraordinarily high incidence of violent and life-threatening crime. President Thabo Mbeki said one in four deaths country-wide was related to violent crime (Sebastian (1) 2001). According to the Institute for Democracy in South Africa (IDASA) the ‘brain drain’ remained one of the greatest challenges to the South African economy (Stewart, 2001). During the last decade 250,000 professional people emigrated, and in 1999, 2000 business executives settled in different countries (Stewart, 2001), reflecting the “haemorrhage of capital” experienced by developing countries generally (Delors, 1996:73). According to Stewart (2001) major reasons given for emigrating were violent crime and future job prospects for children - especially white males, perceived to be threatened by the employment equity act and affirmative action policies.

The second democratic elections in 1999 saw an increased focus on party politics and political point scoring of the sort that was relatively absent in the
Government of National Unity of 1995. The ANC accused opposition parties of being obstructive and hampering transformation. Charges of racism became increasingly common. Examples of bureaucratic ineptitude and corruption were increasingly exposed in government departments, raising questions about the ANC as a protector of our new democratic society. Indeed in the RDP policy audit of 1999, of the Human Sciences Research Council the reasons cautiously given for implementation problems were “lack of ‘political will’, lack of financial and fiscal resources, lack of administrative capacity, and logistical difficulties” (Schlemmer and Smith, 2001:35).

The ANC lost some of the moral high ground. At least one leading ANC politician was ousted for placing ‘morality’ above ‘unity’ in the party. Another politician was instated as Gauteng premier apparently for internal political reasons relating to the forthcoming election, despite serious, seemingly well founded allegations of dishonesty, (Brümmer, 1998). In 1998 in a broadcast interview, Mandela pleaded to the nation to seek out corruption and to deal severely with it, to enable South Africa to be the just society it set out to be in 1994. Again in his retirement Mandela was quoted saying “Little did we suspect that our own people, when they got that chance, would be as corrupt as the apartheid regime. That is one of the things that has really hurt us”. And referring to the general population he said “there is nothing in our struggle that gives people the right … to rob the government or the public” (Barrell and Seepe, 2001:21).

Our politicians gave confused signals. Their words no longer reflected an over-riding interest in justice, freedom and reconciliation; and worldviews associated with intellectuals rather than politicians, that regularly underpinned their earlier statements. Indeed I would argue that these, informed by their academic pursuits as political prisoners or exiles, had enabled the country to

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4 Bantu Holomisa, went to the Truth and Reconciliation Commission to ask for amnesty in 1996. Following his own political agenda, he insisted on raising a matter relating to ANC bribery and corruption. This was considered inappropriate by his party and he was dismissed.
experience its 'moment of truth' when politicians transcended personal and party interest in their striving to reach a common good.

Once the 'romantic' period had passed, nevertheless, our "state-of-the-art Constitution" with its "political ...and socio-economic rights...independent watchdog agencies and commissions and a strong Constitutional Court" was entrenched (Mattes, 2000). Educationalists, moreover, had the third draft of the White Paper (Department of Education 1997a) entitled 'A Programme for the Transformation of Higher Education' that tried to reconcile the early ideals with later priorities. Although debates continue on the capacity of education to impact on democracy there was, at least, in South Africa a "greater interest than elsewhere" in using educational policy to promote the democratic transformation of society (Skinner, 1998). Because of our programme's financially independent, well-resourced status, and guided by our emancipatory interest, we were able to maintain the focus from which later policies diverged, as set out below.

According to University of Natal vice-principal, Professor Ahmed Bawa (1998), universities have a major role in promoting democracy, warning of their diminishing impact on government policy. He warned against inertia or complacency amongst academics in the belief that democracy had been attained and the struggle was over, urging academics to again find those voices that had become subdued during the transition years. He argued that if universities were to contribute to national development, including the promotion of a just, free and democratic society, they must be maintained as centres of scholarship. To do this universities should maintain their autonomy and academic freedom, remain reflective and critical and resist being sucked into positions of surrogate 'government departments' for delivery of new policies. His views echoed Delors' (1996:134) assertion in the UNESCO report that universities had a moral obligation "to participate in the major debates concerning the direction and future of society".
Similarly Dr Mamphela Ramphele (1999), vice-chancellor of the University of Cape Town and former activist, warned of the need to “move beyond liberation politics” and exercise vigilance over our democracy. She spoke of the “conspicuous silence since the advent of democracy” of academics who “spoke out fearlessly about the evils of apartheid” and how the silence of good people was putting the new democracy at risk. “White academics do not speak out on issues of national concern any more because they are afraid they will be labelled racist. Black academics do not criticise the government because of misplaced loyalty born out of a comradeship with roots in the struggle against apartheid – they can’t be seen to be criticising their own....”

Badat (1997) blamed part of this problem on the government’s response to criticism from its left wing, heralding a problem closely associated with the post-1999 Mbeki government. Indeed by 2001 the government’s tendency to over-react to criticism was widely seen as an obstacle to democratic processes causing Mandela’s (2001) call for tolerance of political differences, stressing the need to de-personalise criticism and to welcome different views.

As for South African citizens, Mattes (2000:44) found they were no longer the “interested, informed, participant creatures of politics” they had been in the struggle against apartheid. Despite the emphasis on representation, participation and inclusivity in the constitution he found only minorities of citizens in all racial groups and very small minorities of whites, Indians and ‘Coloureds’ felt parliament was interested in what they thought or wanted. Only 3% of South Africans had made contact with a local councillor and only 0.2% (4 of the 2,200 respondents) with a member of parliament over the previous twelve months. Clearly the new democracy was not working as originally intended.

The past decade thus saw the birth of a new South Africa, with all the hope, enthusiasm and excitement associated with a new birth. The infant democracy was carefully nurtured and all those with a stake in its well-being made sacrifices. Rules were laid down and monitoring agencies set up to
ensure future stakeholders would continue to care for it. Ways of ensuring everyone would learn to value it and nurture it were debated. As the infant began to test its environment, its caretakers began to disagree on how best to protect it. They also began to focus again on other more personal interests from which the infant had distracted them. At the same time the supportive structures became weaker, threatening the nurturing environment and making it more difficult to care for the infant. Indeed at times they found a clash of interests.

While constantly and proudly speaking of the infant democracy, they started to forget its needs. As it began to toddle, it was more difficult to control and its guardians were caught off-guard while focusing on other interests. It commanded their attention when it took a fall, but was generally thought self-sufficient within its well-considered, safe environment.

Some lone voices reminded all South Africans that they shared a stake in the wellbeing of this child and that it was precious and fragile, needing constant vigilance and nurturing if it was to thrive and develop. Although much had been set in place to ensure its survival and growth these mechanisms would not work without the interest and care of the people. Adding to these voices, this study reflects on teaching and learning and the capacity of universities to develop such good, critically reflective citizens and the capacity to meet changing demands.

Globalisation and Education Policy

Education is one service area affected by the above prioritisation with its fiscal discipline and low growth rate. Firstly, policies have had to be implemented on reduced budgets that cannot provide equity and that compound social backlogs (Nicolaou, 2001) and secondly policies have shifted their emphasis in accordance with the 'imperatives' of the global economy. A major influence
on education policy was the rise of the information society and the perceived need to compete globally in terms of knowledge and technology.

The resultant dependence on skilled and highly educated, compared with unskilled labour, shifted the policy focus and countered the country’s democratic thrust for human development to further increase the gap between rich and poor (Wilson, 2001:6-7). Government tried to balance the paradoxical aims of redressing past inequities through *inter alia* broadening access to higher education and at the same time entering the knowledge economy with its ‘first world’ focus on information technology. In a sense it was trying to run before it could walk. Many educationalists from ‘the struggle’ felt betrayed, as early ideals became subservient to both the local and global economy making rhetoric of the early social development priority. In line with emerging policy, the case study question about the course’s effectiveness in meeting the needs of the ‘whole student’ incorporated a sub-question about students’ capacity to develop attributes like analytical, logical thought, valued by business. The other sub-questions, however, reflected our interest in empowering our students as confident, critically aware citizens as well as competent, highly skilled graduates.

By 2002 Higher Education in South Africa faced a new wave “mammoth transformation agenda” (Porteus, 2002) in an era of centralisation and control. This followed the earlier phase discussed below, of ‘symbolic’ policy-making, conciliation, very limited contestation of emerging policy and widespread support for a new government trying to transform the country and redress its past socio-political disgrace (Porteus 2002; Maughan-Brown, 2002).

Having given himself powers to close down and merge institutions in order to achieve his goals, the minister’s plans to reconfigure Higher Education were broadly seen as driven by political and economic, rather than by educational interests (Moja, 2002; Nkondo, 2002; Pithouse, 2002; Seepe, 2002; Subotzky, 2002). Later, more substantive policy developments reflect the new government’s “discernible shift toward stronger state control of systemic
change” (Porteus, 2002:7) and a new context for transformation characterised by far less consultation, co-operative governance or agreement. Indeed understandings of what was meant by ‘transformation’ were extremely diverse (Maughan-Brown, 2002) and an era of some racial polarisation and some antagonism between Higher Education institutions and government was entered (Maughan-Brown, 2002; Moja, 2002; Nkondo, 2002; Pithouse, 2002; Seepe, 2002; Subotzky, 2002).

There was thus less trust and altruism and more suspicion and self-interest as debate was blocked, institutions resisted change and government attributed criticism, *inter alia*, to narrow self-protection, institutional interest and racism. This second transformation wave was thus marked by little of the former energy and optimism associated with the political moment of the early to mid-1990s.

*The early educational focus*

The ANC’s pre-election Policy Framework for Education and Training discussion document (Education Department, ANC, 1994:4), demonstrates its early idealistic focus and provides a benchmark for the shift in focus in response to the global ‘imperative’. It blamed the “fragmented, unequal and undemocratic nature of the education and training system” for the “destruction, distortion or neglect of the human potential of our country” and the profound negative effect on “the development of the economy and society” (Education Department, ANC, 1994:2).

While early ANC policy emphasised values and interests reflecting social reconstruction goals, this was balanced with underpinning human capital and economic development goals (strongly advocated by COSATU). It was proposed that these goals be implemented through a single integrated structure integrating education and training for lifelong education. These early ideas thus reflected world-wide trends of educating for the purpose of
developing competent human capital to grow the economy, showing already a drive towards educating the employed rather than the unemployed. At the same time it portrayed education and training as “basic human rights” that should be “enshrined in a Bill of Rights”, claiming that “all individuals should have access to lifelong education and training irrespective of race, class, gender, creed or age” (Education Department, ANC, 1994:3) - and indeed government was to be taken to court on these grounds for non-delivery in 2002.

The values underpinning these goals were stated as:

- The development of human potential, so that every person is able to contribute freely to society, advance common values, and increase socially useful wealth.
- The realisation of democracy, so that independent, responsible and productive citizens will be able to participate fully in all facets of the life of their communities and the nation at large.
- The reconciliation of liberty, equality and justice so that citizens’ freedom of choice is exercised within a social and national context of equality of opportunity and the redress of imbalances.
- The pursuit of national reconstruction and development, transforming the institutions of society in the interest of all, and enabling the social, cultural, economic and political empowerment of all citizens.

(Education Department, ANC, 1994:3)

Basic education was prioritised as a means of providing the poor with access to higher levels of education and training, jobs and therefore income, and this was linked to economic growth as was the secondary aim of promoting skilled labour. The latter's productivity and “national output” enhancement purpose was closely linked to “the growth of and employment, (including the employment of the unskilled)” (Education Department, ANC, 1994:32). It noted the role of higher education first as a “major resource for national
reconstruction and development” and second, for its capacity to “contribute to
the world-wide advance in knowledge and skills” (Education Department,
ANC, 1994:12). There was no explicit emphasis on entering the global
knowledge economy and thus no debate about the pressures this would place
on social development goals.

The early thinking thus captured the will and ideology of the time. It was
reflected in ideas about lifelong and learner-centred learning, (though
contradictions with the above lifelong education goals were emerging) (Jarvis,
1992a), knowledge as an outcome of social process and the subjectivity of
‘truth’. It recognised that knowledge should be interpreted and critiqued and
difference respected and accommodated - in contrast to the discourse of the
previous regime informed by fundamental pedagogics and Calvinism.

Pinning a great deal on the potential of education to “help rid the country of
the apartheid labour market” (Mahomed, 2001:127) and to transform both
society and the economy, the labour and education ministries worked jointly to
produce the National Qualification Framework (NQF), an integrated framework
for education and training. The post-election 1995 White Paper “Education
and Training in a Democratic South Africa – first steps to develop a new
system” (Department of Education, 1995) largely projected the ANC’s 1994
policy and much of the early RDP focus and ‘labour’ roots, with the Congress
of South African Trade Unions (COSATU) being a key advocate.

The document tried to harness the early idealism, saying new policy was
informed by “the moral vision of the constitution-makers ... as set out in the
charter of Fundamental Rights and the schedule of Constitutional Principles”.
It claimed this would enable South Africans to “transcend the divisions and
strife of the past” and that “frankly and without recrimination, it acknowledge(d)
past evils and conflicts, and in their place offer(ed) a national agenda of
reconciliation and reconstruction, leading to national unity, well-being and
peace” (Department of Education, 1995:17).
Education was considered "a key to the realisation of the personal aspirations of individuals and (government's) socio-economic programme" (with the economic interest being gently incorporated along with the social) and acknowledged the constitutional right of all South Africans to education (National Department of Education, 1995:61). Thus it maintained a focus on enhancing individual growth, improving access to learning and promoting mobility, progression, equity, quality and relevance in the education system, focusing on the proposed structural changes with few references to the economy. Indeed it perceived education and training in terms of both basic human rights and "essential elements of human resource development" (Department of Education, 1995:15) integral to the RDP, demonstrating the predominantly local focus.

Through the integration of education and training, policy rejected "a rigid division between 'academic' and 'applied', 'theory' and 'practice', 'knowledge' and 'skills', 'head' and 'hand'"; arguing it promoted "very old occupational and social class distinctions" associated with South Africa's past "ethnic structure of economic opportunity and power" (Department of Education, 1995:15). The government thus proposed that all learning should be co-ordinated in a single national system and that it should be outcomes-based, profoundly disturbing the higher education sector, because of its 'training' and behaviourist origins, in terms of its ability to protect its 'standards'. (The problems of locating our teaching and learning philosophy in outcomes-based education (OBE) are raised below and in relation to the question of experience-based learning theory framing our practice better than PBL, explored in Chapter Eight).

Though equity had been the guiding principal of the early policy-makers it had not been achieved ten years later. At the Doctoral Consortium Summer School Programme of March 2002, organised by the University of Durban-Westville's Centre for Educational Research, Evaluation and Policy, three such policy-makers attributed the failure to various causes. Pampallis (2002) blamed the GEAR strategy's constraints on policy implementation, the inherited local social structure, with its resistance to change, and the global
structure prohibiting its achievement. Muller (2002) indicated intellectual differences amongst the early policy-makers, obscured by the shared political end and euphoria of the time, and the consequent willingness to compromise (leaving subsequent dissatisfaction with some of the focuses and the direction policy took). On the other hand, Jansen (2002a) argued that policy’s role was to symbolise the values of government rather than to present itself in implementable form, asserting that at least one provincial director-general of education had recognised from the beginning that its goals were unattainable.

For whatever reason, despite implementation difficulties, the interests and values underpinning this study largely coincided with the early focus on individual growth, embracing lifelong learning for this purpose, and the transformation of South African society into one that promoted democratic, moral and critical thought and behaviour.

*Shift to the knowledge society and human capital focus*

After 1994 there was an incremental shift in focus towards educating for the knowledge society, rather than for social development needs, reflecting an international trend of streamlining education and training for the economy (Mahomed, 2001). It resulted partly from conciliatory purposes of developing policy for the initial Government of National Unity acceptable to a range of interest-groups, including those from the ‘first world’ part of the economy (mostly white); and partly from a growing belief in educating for the global knowledge economy to grow wealth in order to address the poor’s needs.

While the documents all referred to balancing local demands with global ‘imperatives’, they reflected policy shifts towards the latter. They focused less on redress, equity, capacity building and transformation and more on serving the economy and market, both local and global, revealing global market priorities that diluted the social goals of the original policy vision (Vally and
Sreen, 1998). At best, it was a brave but naïve attempt to achieve both with equal enthusiasm. At worst, it was a cynical use of rhetoric to appease critics.

The Green Paper on Higher Education Transformation (Department of Education, 1996) revealed this tension. In the list of purposes for transformation, came first the ‘development’ need to meet the “needs and aspirations of individuals through the intellectual development of their intellectual abilities and aptitudes” recognising higher education’s role as “a key allocator of life chances” (Department of Education, 1996:3). This was followed by the knowledge economy focus:

Higher education provides the labour market, in a knowledge-driven and knowledge-dependent society with the high-level competencies and expertise necessary for the growth and prosperity of a modern economy. It teaches and trains people to fulfil specialised social functions, enter the learned professions, or pursue vocations in administration, trade, industry and the arts

(Department of Education, 1996:3).

Thereafter came the social development, RDP focus again:

Higher education is responsible for the socialisation of enlightened, responsible and constructively critical citizens. Citizenship of this nature presupposes a commitment to the common good, but it also implies a reflective capacity and a willingness to review and renew prevailing ideas, policies and practices

(Department of Education, 1996:3).

Although the green paper thus acknowledges a place for learning for ‘life’ and for ‘good citizenship’, as well as for ‘work’, it raises questions, *inter alia*, about who would decide, and on what basis, whether criticism was ‘constructive’ or the ‘common good’ was being upheld. It reveals some caution once they, the historical critics, were in power, heralding problems with criticism in the post-
1999 government and its tendency (rightly or wrongly) to attribute it to racism Schlemmer (2001). This contextualises the study's questions about experience-based learning theory providing a better framework than PBL could for our holistic approach and our interest in criticality and personal empowerment.

While reference to both equity/access issues and lifelong learning, from a curriculum transformation view, remained, there were some disturbing silences, ambiguities and contradictions. There were silences about curricula in terms of their potential for transformation, while there were increasing emphases on education for human resource and economic development for the global information and knowledge economy. This was reflected inter alia in the focus on technology, especially information technology; the minimal discussion on how outcomes-based education, with its roots in 'training', sat with 'education' and a change in terminology from 'teaching methodologies' to "teaching technologies" (Department of Education, 1997a:18).

As elsewhere in the world, policies reflected the assumption that lifelong education's purpose was to improve the country's work-force, developing good employees or corporate citizens, as elaborated below. The early concept of lifelong learning as a means to promote individual growth and critical, informed citizens was thus subtly but increasingly hijacked (Jarvis, 2001). There was little debate about the different types of knowledge to be promoted by education policy, though it advocated an emphasis on integrated knowledge and a closer link between theory and practice. The National Plan (Department of Education, 2001b: Section 1.1) focused on higher education's role in meeting the country's reconstruction and development challenge in a "knowledge-driven world" as the "production, acquisition and application of new knowledge", but this focus was consistently counterpoised with an acknowledgement of social development needs. Drawing on White Paper 3 (Department of Education, 1997b:10) it argued that
national growth and competitiveness is dependent on continuous technological improvement and innovation, driven by a well-organised, vibrant research and development system which integrates the research and training capacity of higher education with the needs of industry and of social reconstruction

(Department of Education, 2001b, Section 1.1).

At the same time it highlighted higher education’s role in developing high level skills training: the training and provision of personpower to strengthen this country’s enterprises, services and infrastructure. This requires the development of professionals and knowledge workers with globally equivalent skills, but who are socially responsible and conscious of their role in contributing to the national development effort and social transformation

(Department of Education, 2001b, Section 1.1).

Again, higher education is challenged to educate for the two aims, but within the framework of educating for the knowledge economy. This clearly demands a focus on technology and vocational education and those ‘useful’ disciplines therefore targeted by government.
Following a world trend, the shift towards vocationalism in new education policy was a response to a critical shortage of skilled labour for an economy requiring a “workforce increasingly skilled in information technology, finance, engineering and management” (de Souza, 2001a). As elsewhere, education policies and the country’s social development were being driven increasingly by the rise of information technology and its centrality to the knowledge society controlled by the powerful ‘North’ (Jarvis, 2001).

By 1997 the decision to educate primarily for participation in the global economy was clear. The Draft Education White Paper 3 (Department of Education, 1997a:11) noted the “formidable challenge” of becoming integrated into the competitive arena of international production and finance with new computer and communication technologies transforming the way people work and consume”. Three years later the National Plan (Department of Education, 2001b, executive summary) announced the plan to “shift the balance in enrolments over the next five to ten years between the humanities, business and commerce and science, engineering and technology from the current ratio of 49%:26%:25% to 40%:30%:30%. Indeed the Minister of Trade and Industry (Erwin, 2002) argued for the need to develop manufacturing capacities to earn foreign currency, urging universities to focus on mathematics and science and to follow the direction of technikons in preparing students with skills needed by commerce and industry.

This confirmed that ours was to be an economy-led education system rather than an education-led economy (Mahomed, 2001; Young, 1999), as elsewhere in the world. It also highlighted the paradoxical situation of a developing country trying to enter the world economy when a dismally “low number of students leaving the school system with the required proficiency in mathematics” made the above adjustment difficult, and further adjustment impossible (Department of Education, 2001b, executive summary).
Although mathematics and science education has been a high priority in education policy (de Souza, 2001a) from 1994, there was still, according to the Department of Education a "shortage of between 4 000 and 12 000 teachers in maths and science". At the same time, of the relatively very small proportion of African senior certificate candidates who wrote examinations in mathematics and science in 2000, at the level required for access to these disciplines at tertiary institutions, only 15% passed in each case (de Souza, 2001b:275).

The above focus meant the country's needs for skills *inter alia* in education, law, social services and arts to address some of our root social problems, while acknowledged, were not targeted as a development focus (Department of Education, 2001b) highlighting the National Plan's priority of educating for the knowledge economy. The Minister of Education, Professor Kader Asmal demonstrated this political tension when he spoke on the one hand of the "arid utilitarianism" of developing people for the economy and on the other the need to target the development of 'high skills' in mathematics and science. A historian by education, he argued at the same time for the importance in society for historians and language specialists, particularly in indigenous languages, although these were not targeted areas in terms of targeted funding (Asmal, 2002).

The National Plan, in fact, identified its 'bottom line' through the argument that "irrespective of the balance in enrolments, the key issue (was) to ensure that all graduates are equipped with the skills and competencies necessary to function in modern society, in particular, computer literacy, information management, communication and analytical skills" (Department of Education, 2001b, executive summary). The focus on qualifications for employability and the growth of the economy favoured faculties like Commerce and Engineering, targeted by government and business for development and therefore funding, locating the practice under study in a favoured discipline. Furthermore our
work in providing access to black African students, even on its small scale, gave it synergy with government policy.

The 2001 National Plan (Department of Education, 2001b, executive summary) noted the under-representation of "black and women students ... in business, commerce, science, engineering and technology programmes...". Indeed this was unsurprising. The 1997 White Paper had acknowledged the paradox of seeking to increase "participation rates for black students, ... within the foreseeable future in the context of the government's macroeconomic framework and fiscal policies" (Department of Education, 1997b:21). It left institutions responsible for broadening access to previously excluded communities without appropriate funding, inevitably threatening social development goals.

Indeed by 2001 declining numbers of student enrolments in higher education [29% between 1993 and 1998 (de Souza, 2001b:276)] became a focus of concern, largely attributed to decreasing numbers of matriculants, high drop-out rates amongst first year students, particularly black Africans (de Souza, 2001b:276), limited financial access related to poverty and diminishing motivation in view of unemployment and job uncertainty for graduates. At the same time, declining numbers of matriculants are ascribed to poor schooling, lower birth rates and the AIDS pandemic (Jansen, 2002b).

Furthermore the 2001 National Plan recognised that inequitable access problems were compounded by inequitable outcomes "with black students accounting for a larger proportion of drop-out and failure rates than white students". It therefore argued "institutions will be "expected to establish equity targets with the emphasis on the programmes in which black and women students are under-represented and to develop strategies to ensure equity of outcomes". This supports my argument for the ongoing relevance of both my practice and research, at least in the South African context.
Lifelong education

At the same time government was increasingly linking the concept of lifelong learning to developing skills for the economy, rather than to ideas of individual growth through developing, for instance, curious attitudes and enquiring minds to equip people for a lifetime of independent learning. Government aimed through the NQF to remove barriers between the different kinds of learning that took place in different settings, aspiring to create a ‘learning society’ that engaged in lifelong learning. This was reminiscent of Britain’s 1919 report of the Adult Education Committee of the Ministry of Reconstruction, representing the early origins of lifelong learning ideas. According to Skager and Dave, (1978:326), quoting Jessup) the committee concluded adult education was a necessity to the nation and should be “both universal and ‘lifelong’.

There was again no ‘educational’ discussion about lifelong learning, however, but rather an assumption in White Paper 3 (Department of Education, 1997b) that the structural changes would make learning accessible to a diverse body of learners and thereby promote democracy, employment and economic development (Walters, 2000). The document thereby implied that the plan would cater for both local and global interests. As elsewhere in the world, however, the concept was hijacked by government plans (Jarvis, 2001).

Formal lifelong learning opportunities were far less accessible to the poor and unemployed than the rich and employed in reality, making rhetoric of the early plans to use lifelong learning to promote a democratic, egalitarian society. What was to be prioritised was individuals’ upgrading of qualifications for purposes of retaining jobs or being promoted, and enhancing the country’s economic competitiveness, while social development programmes were implemented on declining budgets. indeed legislation forced business to engage in extensive training programmes against which they could reclaim compulsory ‘training levies’ paid to government. Thus the motive (or rhetoric) of promoting lifelong learning for “human development and democratic citizenship” (Walters, 2000:28) was overtaken by government’s economic
development focus. This reality provides a context for Chapter Eight's reflections on having conceived the practice as PBL, a pedagogy monopolised by professional education for the purpose of developing good ‘corporate citizens’ (Jarvis, 2001), but pushed its boundaries.

Lifelong education was to be structurally supported by the NQF “planned, governed and funded as a single, coherent, national system (Department of Education, 1997a:18) conceptualised as the structure through which transformation of apartheid education would occur. At the same time it was educationally framed by the concept of OBE and training, and the identification by the South African Qualifications Authority (SAQA) of critical outcomes that would underpin the myriad curricula registered on the NQF.

*Outcomes-based education (OBE)*

The implication of the earlier drafts of the White Paper was that all learning within the NQF would be reduced to small units of learning. Universities argued, however, that unit standard methodology and the construction of qualifications from multiple units of learning would trivialise their learning and their degrees. As a result it was conceded that universities would assess learning through entire ‘programmes’ that would replace the current degrees. In this way boundaries between disciplines, and between academic, vocational, formal and informal knowledge would be permeable, but would not be allowed to collapse altogether in the higher education context.

In terms of the programmes / OBE approach, the mastery of a discipline was seen in terms of both subject knowledge and ‘operational competence’ in the world of work (Ngara, 1998). This clearly posed problems for teaching and learning in arts and humanities, while it could be accommodated in the more vocationally orientated programmes, in management studies, science and technology. Nevertheless by 1998 all courses had to be registered as modules within a programme according to a set outcomes-based format.
Critical outcomes were defined in education policy as those generic outcomes that should inform all teaching and learning including but not limited to:

1. Identifying and solving problems in which responses display that responsible decisions using critical and creative thinking have been made.
2. Working effectively with others as a member of a team, group, organisation, community.
3. Organising and managing oneself and one’s activities responsibly and effectively.
5. Communicating effectively using visual, mathematical and/or language skills in the modes of oral and/or written presentation.
6. Using science and technology effectively and critically, showing responsibility towards the environment and health of others.
7. Demonstrating an understanding of the world as a set of related systems by recognising that problem-solving contexts do not exist in isolation.
8. Contributing to the full personal development of each learner and the social and economic development of society at large, by making it the underlying intention of any programme of learning to make an individual aware of the importance of:
   I. reflecting on and exploring a variety of strategies to learn more effectively
   II. participating as responsible citizens in the life of local, national and global communities
   III. being culturally and aesthetically sensitive across a range of social contexts
   IV. exploring education and career opportunities
   V. developing entrepreneurial opportunities


The enormous difficulties in implementing the new curriculum, particularly in under-resourced schools were reviewed by the ‘Curriculum 2005 Review Committee’, chaired by Professor Linda Chisholm. In the revised Curriculum 2005 report (Chisholm, 2000) efforts were made to express OBE in a more educationally progressive way, making both policy and implementation strategies more accessible to teachers who were found to be very confused.
However, it also indicated some recognition of the need to move away from OBE's behaviourist roots towards a more constructivist approach, incorporating expressive objectives or outcomes associated with Eisner (Hamilton et al., 1977), in an attempt to marry something akin to Stenhouse's process curriculum model to the OBE model. It thereby enhanced possibilities for focusing on process as much as outcome (Schroen, 2001).

At the same time it warned that while 'Curriculum 2005' was a "bold and revolutionary" innovation through which education would "no longer reproduce the limited interests of any one particular grouping at the expense of another" (Chisholm, 2000:16), it could not transform the country. It endorsed the view that education could not promote economic growth without supportive economic and political policies and structures (Jonathan, 2000; Rogers, 1992; Vally 2000), emphasising that this new curriculum could not "change society or on its own produce national development" (Chisholm, 2000:16). The reflections of Chapter Eight will explore the contradiction of locating a progressive curriculum and pedagogy within the framework of OBE.

Thus OBE was a response to 'global' pressures to educate for economic growth and competitiveness problematic in its implementation and surrounded by political rhetoric relating to our 'local' development needs. Along with the above notion of lifelong education for the market, for human capital and the knowledge society, it demonstrates policy 'slippage' (Muller, 2002; Pampallis, 2002) from the early focus on social justice, or the 'symbolic' intent of unimplementable policy (Jansen, 2002a).

Conclusion

In this chapter we have considered aspects of the local, socio-political and cultural context, specifically those of business and education, that have explained something of the unique time and circumstances of this work. The discussion has made obvious the rationale for asking the research questions
by providing the background to some of the difficulties facing our students. This has clarified my quest to explore possibilities for implementing a curriculum that could meet the needs of the 'whole student', helping them overcome their disadvantages and achieve more of their academic potential than they could through traditional courses alone.

The chapter has also tracked education policy shifts as responses to global pressures, demonstrating how government's priorities shifted from goals associated with a social development-led economy to those of an economy-led society. There has been discussion about the restricted resources for social development, including school education, which suggests it is unlikely that students from poor communities are going to be better prepared for university study in the near future. This indicates the continued relevance of the research questions in South Africa, nine years after liberation. It also suggests that the statistical data comparing the examination marks of 'our' students from poor schools and 'other' students gathered over the five years subsequent to the case study, was still considering the performances of grossly under-prepared against relatively advantaged students. This will be relevant to the reflective research question about the case study findings' wider applicability, addressed in Chapter Ten.

As the thesis progresses, indeed, references will be made to relevant aspects of the study's broad context. The chapter has also provided a background for considering the effectiveness of the learner-centred curriculum in the case study of Part Two. At the same time it has flagged issues for reflection in Part Three, in terms of the course's capacity to accommodate African culture and realities, explored in Chapter Eight.

Having signalled the challenges facing education in this broad discussion of the South African situation in the mid 1990s, we are now going to locate this work more immediately in the context of the University and the division from which it emerged. In the next chapter, therefore, we will look specifically at the institution's plans to respond to the above realities, and how the curriculum studied and the division's work related to its strategy for change.
CHAPTER TWO

THE UNIVERSITY’S RESPONSE TO A CHANGING CONTEXT

Having outlined the broad context of South Africa at the time when this research was undertaken, we are now going to explore how one university (mine) responded to these conditions and emerging policies by developing a strategic plan. At the same time we will see how the division in which this study is based, changed rapidly and developed a curriculum reflecting both government policy and University plans. This will clarify how the practice under study represented the implementation of a curriculum reform project framed by the University’s strategy for change. The chapter will thus continue to explain the context for the case study, started in the previous chapter, and provide the background for reflections later on the University’s capacity to change enough to accommodate non-traditional curricula. It will do this in two main sections, which are:

- The University’s strategy for change, including its curriculum reform plans and how they framed our work.
- The division’s response to the changes, including a description of its location and structure, the broad curriculum and the course under study, with its underpinning philosophy.

In this way we consider the links between the broad South African and global context and the University’s strategic plan, developed between 1991 and 1994, and how the University tried to loosen its traditional structures to become a ‘learning university’ at this time that was ripe for change. We look at the University’s curriculum reform plan in terms of its aim to meet both local and global challenges, flagged in Chapter One, and we see how difficult it was
for the University to implement broad change, even when the vice-chancellor worked specifically and determinedly towards it. The chapter thus illustrates the problems in applying learning organisational theory in universities. It signals the conservative nature of traditional university structures, culture and staff mindsets and how this obstructs change, providing a background for the reflections, in Chapter Nine, on why universities might not be able to change enough to accommodate learner-centred curricula.

This reality is contrasted with the experience of the programme in the light of its being relatively well resourced and having open structures and a culture associated with a 'learning division'. This gave us the freedom to work dynamically, illustrating the synergy operating between the external and internal forces for change within our programme, and contrasting this with the institution-wide experience, where the external energy for change was not harnessed and the internal momentum was lost, hindering change. The chapter also highlights the fact that attempts to introduce a non-traditional curriculum, like those represented in the case study, were rare in the University. It relates these problems to the economic restrictions discussed in Chapter One through the associated overburdening and demoralisation of staff who were required to implement curriculum change although they were not generally trained in education. They displayed resistance to change, indeed fear of it, and suspicion of the state's political manoeuvring, including the increasing power it granted itself to erode academic autonomy. The chapter thereby signals the argument, pursued in Chapter Nine, that we were able to implement a non-traditional curriculum because of the freedom, structures, culture and resources we enjoyed.

The discussion of the curriculum, its purpose and theoretical framework clarifies the central differences between the curriculum experienced by 'our' and 'other' students to provide a context for considering the comparative statistical analyses of their academic performance in the case study, in Chapters Eight and Ten. It also explains the kind of learning conditions that we sought to provide for our students, and how our progressive approach was
not restricted by the relatively conservative notions of OBE and PBL with which it worked. This chapter, with Chapter One, thus illuminates the rationale for the study and helps to contextualise the research questions, as set out on pages 18 and 19.

University Strategy – response to the local and global context

Against the background of "a continued conflict in socio-political philosophy between the Government and the university" (University of Natal, 1989:1) and following 1983 legislation relaxing state controls on student admission, a new mission (Appendix 1) was adopted in 1989. It sought to "serve all sections of its community through excellence in scholarship, teaching, learning, research and development" (University of Natal, 1989:20).

The University thereby aimed to adopt a new role in society, transforming itself from a 'white' university, that gave access to a relatively homogeneous group of students mostly from English-speaking, privileged home and schooling backgrounds. It acknowledged its "major function and responsibility to question the way in which society operates, to analyse and evaluate the effectiveness and justness of its social, political and economic institutions" and to focus "the community's intellectual conscience" (University of Natal, 1989:2).

Noting *inter alia* the low percentage pass rates achieved by "first-time first-year African students" (University of Natal, 1989:4) it recognised the need to "actively move forward towards being a fully South African liberal university (a racially and culturally mixed university of liberal tradition)" (University of Natal, 1989:5). Reflecting the new mission statement of 1989 the programme under study was launched that year (and my appointment made). Chapter Nine will reflect on its implementation in relation to universities' capacity to change and explore reasons for its survival in relation to the fate of other, more short-lived, idealistic interventions also started in the liberal tradition.
The University's 1989 deliberations heralded the 1992 choice of a 'Quality with Equity' strategy developed between 1991 and 1994 in preparation for its role in serving a democratic society. Its aim was "to balance quality, equity and cost-effectiveness" goals to deliver "quality teaching which enables students from all backgrounds to realise their academic potential and to obtain degrees of a continuing international standard..." (University of Natal, 1992:4). This strategy validated the traditional role of a university to "educate, to undertake research and provide services to the community" (Jarvis, 2001:34) it strove to uphold, providing a framework for this work. The University's strategic initiatives (University of Natal, 1994) provided a framework for this work, particularly its focuses on curriculum reform, on developing thinking graduates prepared for a lifetime of learning, on interdisciplinary learning and on providing access to previously disadvantaged students. Its goals, in fact, closely reflected those of the new South African Government of National Unity's Education Ministry of 1995 (Department of Education, 1995), making it the first time in forty years that synergy between government and the University was experienced.

Through its 'quality with equity' strategy, the University aimed to achieve its mission of "serving all sections of its community through excellence in scholarship, teaching, learning, research and development" (Annual Report of the Vice-Chancellor and University Principal, 1994:1). This meant through quality teaching it would enable students "from all backgrounds to realise their academic potential and to obtain degrees of a continuing international standard" (Vice-Chancellor's Review (VCR) (1994:2).

Just as the new government suddenly had access to, and was challenged by, the global economy, the University in a parallel process, was no longer politically isolated from the rest of the world and was exposed to the challenges of world educational trends. Recognising its global location in the 'knowledge economy' (David, 1997; Jarvis, 2001) and the changing role of universities in response to this, it strove to balance its social development
focus with strategies to produce a new kind of graduate with 'high skills' for the global economy.

In a context of harsh subsidy cuts, new views of the university's role, and the knowledge society's demand for different kinds of knowledge and learning, the University planned to locate the country's specific educational needs in an "increasingly integrated, competitive and technological world ... These challenges necessitate(d) hard choices and bold experiments" (like reconfiguration, through rationalising departments that did not break even, and transformation, for example, through reforming curricula) (University of Natal, 1994:1).

Curriculum Reform Plans

"Curriculum reform" and "educational development" initiatives were thus informed by both "the needs of students coming from disadvantaged backgrounds" (University of Natal, 1994:4) and changing needs of our society. The strategy identified new course development as a means of meeting its curricular imperatives and producing graduates with the required knowledge, skills and dispositions (University of Natal, 1993:2). Indeed it sought "by means of fostering independent critical inquiry, to produce graduates who are well-informed, articulate, thoughtful and responsible" (University of Natal, 1994:4), arguing curriculum reforms should involve "a rethink of the way courses are taught" to give students:

- A keen appreciation of where they are in history and what responsibilities and leadership roles they may be expected to fulfil...
- A keen appreciation of the ethics of their particular chosen careers, the ethics, indeed of making choices at this moment in history

(University of Natal, 1994:4).
To elaborate, the above document draws on the Vice-Chancellor’s inaugural address:

The principal aim of such curricula will not, of course, as Derek Bok wrote, be to impart ‘right answers’ but rather to make students more perceptive in detecting ethical problems when they arise, … and more equipped to reason about the ethical issues they themselves will undoubtedly face in their personal and professional lives

(Gourley, 1994:4).

In terms of Saddlington’s (1992:45) analysis of adult education’s theoretical traditions, the University was thus selling itself short in some respects, locating itself within the liberal tradition. Progressiveness and elements of humanism and radicalism were evident, for instance, in its interest in reform and social transformation; in ‘judgment and ability to act’ counting as knowledge; in seeing the educator’s task as embracing elements of guiding, supporting, and conscientising; and with a focus on ‘responsibility’ and ‘integration’ of its graduates. (This is pursued in Chapter Nine in terms of the University’s capacity to change).

At the same time the strategy for producing a new kind of graduate was informed by the demand from business for competent graduates who, inter alia, could think critically and solve problems effectively. Thus curriculum reform was aimed at developing graduates not only with the above moral and ethical interests, and a sense of time and place, but also with independent research skills that equipped them for “a lifetime of learning”. It promoted an integrated approach to knowledge and multi-disciplinary studies with a focus on skills “critical analysis and problem-solving, at least basic numeracy and information technology, good writing and presentation and ‘enterprise’” (University of Natal, 1994:4), reflecting focuses of the critical outcomes identified by government and interests of our programme.
Furthermore the 'equity' aspect of the strategy aiming to make access to the University more equitable included "alternative selection programmes which aim to produce a proper mix of students across racial, gender, rural and urban divides" (University of Natal, 1994:7). It thus provided a framework, on the one hand, for our work in terms of the access it provided for black African, often rural and increasingly women students, our curriculum and development interests and for this research. The reality in 1997 was, unsurprisingly, that black Africans still comprised a minority group, dominated by the language and culture of Anglo-Saxon students and staff but this was to change rapidly in terms of students. (By 2002 academic staff were still predominantly white males, but only 20% of the student body was white, indicating again the rapidity of change in our context).

As elsewhere, the implementation of its initiatives was constrained by financial capacity. The University of Natal Task Group (1997:1) reviewed the University's academic, administrative and management structures to make recommendations on "optimum structures for the university to face the present financial crisis", and to "produce parameters to help decision-makers identify ways of reducing costs and to advise on processes by which strategic financial decisions should be made". Despite having closely mirrored government goals and focuses in their strategy there was no 'reward' but insufficient funding even for the targeted vocational and 'economy-boosting' areas, demonstrating the impact of our low economic growth. It also highlights the difficulties of balancing the 'local' and 'global' interests in developing societies.

The task team (University of Natal Task Group, 1997) noted in 1997 that academic development and curriculum reform had not been widely achieved in accordance with its strategic plan and planning guidelines (University of Natal, 1993; 1994). It noted that foundation programmes and interdisciplinary initiatives had depended largely on the enthusiasm of a few interested academics and that progress had been slow. This highlights the advantage of our privately funded status and freedom from university structures and politics.
in contrast to the difficulties experienced implementing change in ‘mainstream’ contexts. These included contexts of high student to staff ratios, declining resources, staff's ‘natural’ resistance to collaboration and change and their lack of training in education (raising questions about the case study’s findings being more widely replicable, re-visited in Chapter Nine).

We had a rare opportunity to develop a curriculum framed by the University's ideals in terms of the “three major operational changes” that would be involved:

- substantial reform to the curricula, making these more relevant to the African context and ensuring the production of competencies which society needs. Options which require serious consideration are foundation courses...
- the creation of a learning environment conducive to academic success ...(involving) the development of supportive cultures ...
- integration of development activities into the mainstream of the University so that teaching and research programmes benefit from the work of the units and centres

(University of Natal, 1992:4).

These in turn influenced this study's interests and contextualise the research questions outlined on page 18. Five years later, the University identified its purpose in an internal document on curriculum reform (Duminy, A and Lund, J, 1997:1-2, on behalf of the executive) that revealed a pragmatic shift in focus while (as in government policies) trying to balance this with its ideals. Drawing on the above planning guidelines and initiatives (University of Natal, 1993; 1994) and a report commissioned by the British Association for the Advancement of Science (“Learning to Succeed: a Radical Look at Education Today and a Strategy for the Future, 1995”) they emphasised the needs of the modern world in defining its purpose. They argued it “requires graduates who possess a range of skills that empower them for the various roles they will
have to play, whether they are self-employed, or move through a series of jobs”. Curricula should be ‘enabling’, helping graduates develop skills to “manage products and direct people”, linking this to the need to serve a “knowledge-driven and knowledge-dependent society”.

They thereby reflected the dominant discourse on preparing students for work. However, drawing on the 1994 Strategic Initiatives (University of Natal, 1993:4) they balanced the list of specified skills geared for work, with reference to the need for appreciation of issues of social justice and ethics (Duminy, A and Lund, J, 1997). This relates to questions that arose from the survey of PBL literature in Chapter Seven about the need, in our context, to extend the dominant discourse about knowledge, and my Chapter Eight reflections on experiential learning theory. It relates also to the University’s curriculum vision of developing students to be “creative people, trained for the experience of lifelong learning” (University of Natal, 1995:30).

*Lifelong education*

Drawing also on the 1997 National Commission on Higher Education Report, Duminy and Lund (1997) argued for the need to conceptualise higher education as a “stage in a process of lifelong learning” with institutions having to “find ways of identifying the capacity of students to manage their own learning”. They focused on the need to “learn how to learn in a learning society”, supporting this study’s interest in teaching and learning. Moreover their strategy for change embraced UNESCO’s argument, according to Jarvis (2001:82) that the main mission for universities is “to educate responsible citizens” reflecting the vision of a good, democratic and egalitarian society espoused in early government ideals. In balancing the pragmatic and more idealistic goals the University’s concept of lifelong education (Jarvis, 1992a) did not subsume its concept of lifelong learning. It thereby demonstrated recognition that there is more to life than work and that
universities' roles go beyond developing 'high skill' graduates for the knowledge economy (Jarvis, 2001).

In questioning government's motive for lifelong education Walters' (2000) highlights the divergence from early idealism, indicative of the trend for both governments and corporations to highjack the lifelong learning concept for their economic ends (Jarvis, 2001). This study assumes that an effective educational approach would empower learners as lifelong learners with a relation to knowledge characterised by *inter alia* an interest and capacity to problematise situations. Behind my questions is an interest in helping learners understand knowledge to be subjective and dynamic, and therefore to accommodate new understandings within their conceptual frameworks, adjust their views in terms of new knowledge and changing circumstances throughout their lives, constantly growing and developing in their understandings. Naturally no such claims can be made through this study. This discussion demonstrates, nevertheless, the way lifelong learning was conceptualised in the course discussed below and in the case study of Part Two, and how the curriculum was better framed by experiential learning theory, as argued in Chapter Eight.

*Interdisciplinary studies*

Reflecting the strategic initiatives (University of Natal, 1994) the vice-chancellor particularly emphasised the importance of "fostering connections across disciplines" to achieve a 'holistic' worldview with a "more integrated and authentic view of life" (Gourley, 1994:4). The University thereby reflected government's educational aims to be presented in the form of critical outcomes, providing a framework for the course discussed below.

Drawing *inter alia* on Barnett's (1990) and Middlehurst and Barnett's (1994) warnings against knowledge learned in isolation, my questions about the course's effectiveness assume an interdisciplinary approach. This resonates
with widespread educational trends and market interests in 'Mode 2' learning
to promote knowledge application, reflexive knowledge, deep level learning
and research in realistic contexts. However, the case study of Part Two,
including the PBL literature review, reveal our different purpose for using PBL
or 'Mode 2' education which is by its nature interdisciplinary (Gibbons et al,
1994).

Outcomes-based education (OBE)

Once OBE became policy for Higher Education, a handbook was produced to
guide our University's academic planning "for the development of new
programmes and modules and for the improvement of old ones" (Luckett,
1998:3). Recognising the contradictions in implementing OBE within the
framework of government's professed educational ideals, the guidelines to
staff on how to reconceptualise their courses as outcomes-based modules
clearly attempted to interpret OBE as progressively as it could. It also aimed
to promote an educational discourse amongst discipline-focused staff
(Luckett, 1997b), thereby using the opportunity for critical reflection and
course improvement.

To counter OBE's behaviourist underpinnings it urged staff to integrate the
knowledge, skills and values outcomes as their "appropriate combination ...
and application in a real world context ... signifies competence or capability"
beyond its 'training' origins (Luckett, 1998:7). It also warned that in assessing
outcomes, particularly those "dealing with attitudes and values, it may be
necessary to have specified the desired learning outcome, but acknowledge
that one is unable to develop a valid or reliable test for its assessment"
(Luckett, 1998:35). The contradictions and problems inherent in applying a
progressive interpretation of OBE are touched on below and will be revisited in
Chapter Eight in relation to experiential learning theory.
The Division's Response - a curriculum implemented

Having outlined the University's response to both local and global contexts, in terms of its strategy for curriculum reform, the final task of this chapter is to familiarise the reader with the practice as an example of a curriculum and pedagogical intervention. This section locates the practice within a privately funded programme in the Faculty of Management Studies before giving an overview of the course in terms of its aims, objectives and theoretical underpinnings. It thereby completes the rationale for the research questions and the case study of Part Two.

Location and Structure of the Programme within Management Studies

Because Management Studies was a field ideologically prioritised by government and identified by the University as a focus area for producing graduates who would help grow the economy, our work with Bachelor of Commerce students reflected government policy and gave substance to the University strategy.

In line with business schools and faculties of management studies elsewhere, the dominant discourse pervading our faculty courses related to discipline-based 'factual' knowledge. The 'experiential' aspect was limited largely to mediating for the learners a 'secondary' rather than 'primary' experience (Jarvis, 1992a) through illustrating theoretical points with practical examples, and giving students problems to solve. The potential to enhance learning through these strategies was limited, however, because there was little focus on how students learned. Lecturers and tutors gave insufficient time, for instance, for students to make the connections themselves between theory and practice or to work out why a particular approach to a problem was right or wrong (Skinner, 1998c; 1999b). This reality will be explored more fully in Chapter Eight.
Central to our programme located within this faculty was the course described below and in Part Two. It was an initiative that provided a different discourse for a one semester course out of the twenty-two or twenty-four semester courses (or equivalents), depending on career direction, that made up the degree ‘package’.

*The Programme’s structural evolution*

The programme incorporating this research was conceptualised in 1989 as a ‘bridging’ and ‘alternative access’ programme to provide access and development opportunities for black students who did not meet the faculty’s entrance criteria in terms of matriculation points\(^5\) or mathematics grades. (They were registered as ‘level 0’ students and undertook ‘bridging’ courses in preparation for level 1 ‘mainstream’ courses the following year). Between 1991 and 1997 the programme was reconceptualised as an ‘extended curriculum’ programme with students registering for some first-year courses from the start. This reflected a move away from the (patronising) 1980s conception of ‘student support’ of African students in a ‘white’ university, to the ‘educational development’ focus emerging in the University’s strategy, incorporating student, staff and curriculum development.

By 1997, the year of the case study, the programme model had developed in line with its changing context and related student and sponsor perceptions and expectations. From their first year, students read three of the five mainstream courses (Accounting, Economics and Commercial Law) alongside ‘mainstream’ students, attending the same lectures and writing the same examinations. This left timetable space for our extra course – the subject of the case study; foundational courses in mathematics, statistics and computer literacy (focuses broadly lacking in the schools, and important in our faculty);

\(^5\) Matriculation points were calculated at that time from grades achieved in school-leaver examinations set by racially distinct examination authorities.
and some 'extension' tutorials attached to the mainstream courses. The course's relation to the wide curriculum is discussed below.

The programme was structured so students could read the remaining level one courses in mathematics, statistics and business information systems the following year, while reading two or three level two courses. Their studies were thus planned over four years. While mainstream students' studies were 'officially' designed to take three years, faculty statistics showed the average student in fact took just more than four years to graduate, as a result of failing and repeating courses along the way (Lumby, 1996). Thus our students did not experience a lighter workload than the average student. This reflected the university-wide situation where for two decades up to 1994 only thirty-one to thirty five percent of students completed their degrees in the minimum time and that a focus on the changing student population served to highlight this (Kahn, 1994).

On the 1997 students' recommendation, the 1998 cohort read a fourth level one course in their first year. Then 2002 saw our programme re-conceptualised as 'enriched' rather than 'extended' and restructured over the 'normal' three years, in response to student and sponsor perceptions and expectations, the latter relating directly to economic constraints and pressures for shorter term investments. Thus from 2002 our first-year students have taken on precisely the same five-course load as mainstream students and the course below has been adjusted to fit into the time available. 2003 is to see further changes as the course is developed as a pilot for 'our' students and a second group of about 100 students distinguished by their course of study (Bachelor of Business Science). Then in 2004 it is to be launched as a compulsory 'core' business course for over 600 Management Studies students and integrated within three Economics semester courses for over 1000 students.

The above demonstrates the dynamic nature of the programme and the haste with which changes have taken place, the subject of reflection in Chapter Nine.
in relation to universities' capacity to change quickly, and the fate of idealistic programmes. On the one hand there was some compromise of the programme's original vision and ideals. On the other, its dynamic nature enabled it to survive and develop a vision relevant to the changing context, when many similar programmes, "confounded by limited resources" (Simkins, 1994:43) were forced to close. Most particularly, the programme in a similar historically white institution’s equivalent faculty on which it was modelled, and with which it was therefore comparable, failed to sustain sponsor support. This was despite its favourable location close to the heart of Commerce and Industry and attributed to its reluctance to adapt to changing circumstances (Anglo-American Corporation, 1994).

Business involvement

The programme began in 1989, in partnership with business, in response to a call from business for greater numbers of black African Bachelor of Commerce graduates. Financial support came partially through donations but mostly through business organisations’ human resource development divisions with whom we collaborated to recruit and develop students for their graduate recruitment programmes. Post 1994, business and the professions were under increasing pressure (and some threat) from government to provide equal employment opportunities for all racial groups, through inter alia affirmative action policies. Thus this programme became well positioned to enjoy the support of the private sector through helping them recruit effective black African managers.

Because of the deplorable situation in schools described above, matriculation marks were of limited use in discerning students’ capabilities. We therefore selected our students on a range of criteria (see Appendix 2), balancing educational and other achievements with opportunities available in their schools, homes and communities. We were confronted with some anecdotal evidence for the kind of poverty described above, that still beset our applicant
students in 2001, during one of our student recruitment exercises, underlining the continued need for bursaries from the private sector. (The government-controlled national financial aid system for tertiary students, though massive, simply could not reach all deserving students). It also highlighted the plight of rural women, though this is not a focus here. We interviewed the ‘top ten’ matriculants interested in studying towards a commerce degree, from three schools in a rural area of KwaZulu-Natal.

Of the ten pupils interviewed one had a father employed as a farm labourer; one had an unemployed father at home; five had fathers who had disappeared and three had fathers who had died. One was an orphan, cared for by an aunt. Of the nine living mothers, two were unemployed with one family supported by an aunt and another by a grandmother’s pension. Of the seven employed four were domestic workers and three farm labourers. Each family had between three and seven children and, in each case, was provided for by a woman, comparing with the UNESCO estimate (Delors, 1996:77) that one third to one quarter of households world-wide have women as sole breadwinners. Though anecdotal, the school staff confirmed that the above was true and that the stories were typical of their pupils. These findings thus underscore the ongoing need for educational and financial intervention after six years of democracy. They also highlight the need to empower the poor, particularly women, through education.

Our business partners have been sponsoring fewer bursaries latterly, however, with 2001 and 2002 seeing first–year numbers reduced to thirty-four (from forty-nine in 1997). At the same time there has been an increasing preference amongst most of our sponsors for recruiting students from previously ‘white’, multi-cultural, state schools. These students are often perceived to be ‘less risky,’ mainly on account of confidence with the English language and ease with ‘Western’ culture, as identified through interviews.

To counter this trend, and maintain our interest in working with students from disadvantaged communities, I introduced a different form of fund-raising in
2001, to develop a new structure of bursary provision for first-year students. This enabled us to select students from relatively disadvantaged, historically 'black African' schools (still virtually entirely 'black African') and rural communities in 2002, in line with our original aim. While these students lacked the above 'Western' 'sophistication' and 'polish' we had identified exceptional talent and development potential. We have thus been able to limit the effect of market forces on our student recruitment programme, an aspect of the reflections in Chapter Nine on the programme's capacity to cope with rapid change.

The partnership with business clearly had implications for our autonomy in relation to student recruitment and this was felt increasingly from 2000. Thirteen students in the 2002 class (38%) had had a multi-cultural experience in a previously 'white' school, though many of them were still very poor (children supported by domestic worker mothers in urban situations, for instance). This compared with none in 1997; one or two each year up to 2000; five in 2001 (14.7%) and demonstrates the rate at which our broad context changed. The better academic performance of 'our' students from more advantaged schools, relative to that of the disadvantaged, has encouraged this trend. However, Appendix 3 illustrates that 'our' students from disadvantaged schools still outperformed 'other' students in terms of both quality of grades and pass rates. (Chapter Six will re-visit this, but interesting here is the fact that 19% of 'our' students from disadvantaged schools earned the Dean's Commendation compared with 7.3% of 'other' students, the vast majority of whom were from relatively advantaged schools. Their marks were achieved in the same examinations, written along with all faculty students and marked by the same markers). The statistical significance of these data will be re-visited in Chapter Six.

Despite the power business had to impact on our student recruitment plans and processes, decisions about curriculum and pedagogy were left to us, and responses to our reports on educational initiatives at the biannual meetings with sponsors have reflected their view that this was our terrain. In different
circumstances business may well have wished to directly influence our academic discourse, what was taught and how it was taught, to ensure we prepared students for their work environments. At this time in our history sponsors’ prime concern was that we helped students overcome their disadvantaged backgrounds, to pass their courses and finally graduate. In view of the very poor pass rates of mainstream black African students, their continued support of our programme was directly linked to our students’ academic success. Furthermore our first-year course was seen as foundational and far removed from graduation day. Thus sponsors did not limit our autonomy insofar as the curriculum was concerned.

The broad curriculum of the 1997 programme

As a privately funded programme, in 1997, we were a staff of four academic and two administrative staff working together to provide our 202 (49 first-year and 153 ‘senior’) students with a learner-centred, nurturing experience unavailable to the other 2791 ‘mainstream’ students. The different learning environment was not simply an outcome of more ‘student-friendly’ ratios however. Our 4 : 2 : 202 ratio of academic staff : support staff : students was only slightly more generous than that of the faculty (54 : 19 : 2842). The different experience related more to how ‘our’ students gained access to the faculty and the different development opportunities that they were offered.

On the one hand ‘our’ students were selected onto the programme on the basis of criteria (set out in Appendix 2) beyond the matriculation points calculated from grades gained through matriculation examinations. Although the examinations were standardised by then, across cultural groups, some students had clearly experienced very poor schooling and these criteria were used as guidelines to help identify potential to learn and therefore to meet the University’s challenges.
On the other hand we were education rather than content specialists, and enjoyed the freedom to innovate and develop idealistic pedagogical and curriculum approaches, unbound by a syllabus of content material that had to be covered and bureaucratic procedures and reporting structures (issues for reflection in Chapters Nine and Ten). The academic programme sought to provide a ‘package’ of development opportunities for our students. It comprised the course under study, foundation courses in mathematics and computer literacy and ‘extension tutorials’ attached to mainstream courses in Economics, Accounting and Commercial Law. These involved an attempt to influence mainstream lecturers to adopt learner-centred approaches within their courses. (Though Chapter Five reveals students’ perceptions that most lecturers did not make this transition to any great degree, there have latterly been some developments in this regard leading to further reflections in Chapters Nine and Ten about the effectiveness of experiential learning and overcoming academic staff’s resistance to change).

At the same time administrative staff assisted students with practical problems relating to accommodation, meals and bursary management and financial mediation with sponsors. We adopted an open-door policy, knew our students individually and were on first name terms with them. We presented ourselves as co-learners in developing the best programme we could and called constantly for student feedback, relating to our students as prime stakeholders.

Senior students also contributed immensely to the learner-centred experience we were able to provide. For example, each year, a group of second-year students acted formally as mentors to first-year students, having learned about appropriate skills and approaches through a mentor development workshop. In addition many senior students adopted ongoing informal mentoring roles. Indeed, in 2002, some held weekly classes to discuss the week’s work with first-years, giving them an opportunity to raise academic or personal problems. Furthermore there was a Students’ activities Committee comprising students from each year of study with the responsibility of forging
links across the cohorts through social functions designed to promote mutually supportive relationships amongst the students. The students thus added great value to the programme and indeed helped us develop it effectively in response to changing circumstances and perceptions, as elaborated on page 365, in terms of their initiatives promoted through democratic structures and co-learner roles. (At the same time, of course, this environment enabled them to also develop their self-confidence and skills in, *inter alia*, leadership and communication).

Thus the notion of 'curriculum' was interpreted as the "total learning situation" which refers to "all the learning experiences, intended or unintended" (Jarvis, 1983:213). It incorporated Schwab's notion of four commonplaces⁶, according to Schubert (1986) and Schubert's view of curriculum as "anything that influences or shapes the thought, feeling, outlook, and behaviour of learners in...educative institutions" (Schubert, 1986:301) and was thus inseparable from psychological, social, economic and existential factors. Acknowledging Griffin's (1983:17) assertion that "issues of knowledge, culture and power lie at the heart of any genuine theory of education", and our specific racially divided context, curriculum was conceived as all the teaching and learning that took place. This included "not only what is taught but also who teaches, how it is taught and to whom" (Unterhalter, 1991:133, drawing on Gerwels – who ended up in the President's office in 1994).

The course under study was thus conceptualised as part of a broad, learner-centred curriculum. Within it we used the course to provide a 'primary' experience for our learners (Jarvis, 1992a) and to focus on 'affect' in the curriculum (Beane, 1994). In retrospect this raises questions for reflection in Chapter Eight on the wisdom of having conceptualised the pedagogy as PBL and problems in the case study for evaluating the impact of the course itself.

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⁶ Schwab refers to the four commonplaces of curriculum as teachers, learners, subject-matter and milieu. According to Schubert (1986:176) "milieu refers to the environment, including its physical, social, economic, and psychological aspects".
The course

The course was developed from an informal 'not for credit' course (with similar aims) to a credit-bearing course organised around practical scenarios as vehicles for PBL. The project proposal referred to the value of foundation courses and curriculum reform recognised by the Vice-Chancellor's review (University of Natal, 1993), the historical situation, the needs of under-prepared students and:

- the rapidly changing nature of society which requires that students take responsibility for their own learning, that they are enabled to think critically and to learn how to acquire knowledge rather than being provided with any particular body of knowledge (Hesketh, 1996:1).

The course development process was hasty and problematic in many ways that will emerge in the case study of Part Two. It was a response to the Dean's concern in 1996 that large numbers of 'disadvantaged' students might suddenly need to be accommodated in the faculty and require a more learner-centred mode of teaching than was currently provided. Linked to this was the possibility that new policy, seeking to redress historic inequities, might require offerings for 'disadvantaged' students, and that these might be linked to state funding. (This has indeed become a reality in 2003, when our programme has incorporated an 'Alternative Access' Programme for students who could not gain admission to the faculty on the basis of matriculation points, but this lies outside the scope of this study).

In deference to emerging policy, aims and objectives were presented as 'learning outcomes' in the course description (Appendix 4) that tried to capture our aims and objectives, recognising the leap this represented from students' schooling. Chapter Four explicates our curriculum and pedagogical plans.
Despite differences that emerged during the course development and implementation processes, what was binding and central to the team's deliberations was a shared implicit educational philosophy and a determination to address our learners' needs. We shared an understanding of knowledge and learning reflected in Jarvis' definition (2001:63) of learning as "the process of individuals constructing and transforming experience into knowledge, skills, attitudes, values, beliefs, emotions and the senses". We shared the aim to provide our learners with opportunities to develop attitudes, approaches and skills that would help them develop 'deep' (Entwistle and Ramsden, 1983, drawing on Marton and Saljö) and 'elaborated' (Coles, 1997) knowledge. We aimed to set our students at the start of their studies on the road of a never-ending quest to understand, "to discover truth" (Jarvis, 2001:148) as critically reflective learners with 'intellectual' attitudes (Jansen, 2001). While we associated such qualities and attributes with lifelong learners and good citizens this went beyond the scope of this study.

In contrast to the faculty's other discipline-based courses, our course reflected an interdisciplinary approach (urged by the University and government), integrating knowledge from Economics, Commercial Law and Accounting, and to a lesser extent mathematics through working with realistic scenarios. The case study of part Two explores the effect of the resultant realism on students' learning and its links to prior knowledge.

In accordance with Jarvis (2001:70), we saw PBL, implemented through our hypothetical case studies, as "a method of facilitating learning starting from a problem, the solution of which cannot be taken for granted". Unlike most PBL practices surveyed in the literature (and analysed in Chapter Seven), preparing our learners for a profession was not a primary focus. Our immediate aim was to develop an effective pedagogy for first-year students and for our more emancipatory purpose, hypothesising that we could induce criticality and empowerment that would impact more positively on students' grades than could be achieved through a 'soft' constructivist approach (Larochelle and Bednarz, 1998).
Just as we sought to implement an emancipatory version of PBL in line with our purpose, so did we seek to implement a progressive interpretation of OBE with process objectives informed by a post structural, radical constructivist philosophy, raising issues for reflection in Part Three. We translated these as best we could into learning outcomes conceptualised as intended outcomes with scope for learner input, rather than fixed, pre-determined outcomes. This meant, *inter alia*, letting go of the power to be exclusive definers of outcomes; specifying intended outcomes, but being open to unplanned outcomes, within the broad-brush framework of our course design. Chapter Five raises the difficulties we found in implementing this aim.

The concept of learning outcomes was thus used as a progressive “planning tool” (Frame, 1998) rather than a fixed plan. We thereby sought to push the boundaries of OBE to accommodate our course. This response accorded with the call for teachers to move away from perceiving themselves as knowledge providers, and to confront the content / process dialectic in order to personally empower students. We tried to address hegemony by providing both content and process relevant to our learners, and by promoting critical reflection on the conventions and cultural dominance and prejudices of the ‘West’ (Ngara, 1998). We tried to promote the construction of personally ‘owned’ and believed knowledge (Grundy, 1987; Ryan, 1997) relevant to learners’ experience and environment, where it was internalised within the learners’ conceptual framework rather than superficially ‘understood’. In these ways we worked to disallow OBE to hinder a progressive pedagogy.

Within this framework we planned to use PBL to help students ground theory in hypothetical realistic situations thereby applying higher level skills of critical reflection, developing values reflecting socially responsible, ‘other-centred’ attitudes, appreciation of cultural diversity, awareness of ethical and democratic principles. In this way our aims conformed with government’s professions that outcomes be used to lay the foundations for a “critical civil society” and strengthening its “democratic ethos” (Department of Education,
1997b:8). At the same time because of our location in Management Studies, as in other targeted 'useful' fields, we found that the knowledge and skills outcomes related well to market demands. Thus we could be seen to be advancing both the 'social development' and 'world economy' or 'market' aims of government (Skinner and Fouché, 1998).

Clearly though, the process of implementing a progressive form of OBE was paradoxical because of its links with a training paradigm and functionalist assumptions about competency and assessment. Some learning could not be measured, and any attempt to do so could trivialise it and therefore be counter-productive. In 'training' the competence measured was the skill demonstrated, while in education the 'competence' could be hidden in the learner's heart and mind, unavailable for conventional assessment (Luckett, 1997a). It provided a challenge, indeed, to progressive and imaginative assessment which was, in fact, poorly met in our practice, particularly with regard to the less measurable outcomes linked to attitudes and values.

**Philosophy and purpose**

The socio-cultural context, and specifically our students' school experience of knowledge transmission and rote-learning associated with teacher-centred, authoritarian education, explains our interest in inducing criticality and personal empowerment, primarily to help students to develop a new relation to knowledge and thereby achieve good grades. However, we recognised the fundamental need for personal confidence, self-worth and self-awareness if students were to develop critical capacities and interests. 'Empowerment' was thus seen in terms of students' personal growth, to include critical reflection on attitudes towards, and beliefs about, themselves and others, incorporating existential ways of knowing (Dominicé, 2000). At the same time they would be empowered by the experience of democratic and egalitarian relationships in the classroom.
We emphasised the course facilitator’s role as a co-learner in knowledge construction processes, with interactive learning processes being dependent on students’ active participation. We used PBL as a vehicle for distributing power in this way, validating students’ prior knowledge, opinions and experiences, and enhancing their human dignity. It required students to express their views, responsibly and creatively, and to listen to others. Supported by Rogers’ (1992) ideas on avoiding ‘deficit’ models, our relatively egalitarian relationships with students and democratic teaching, learning, course development and evaluation processes all relied on the students’ contribution, emphasising their richness rather than their poverty. Our practice also assumed an ‘other-centredness’ and an interest in influencing course development processes primarily for future students and, to a lesser extent, for themselves.

We aimed to provide a curriculum experience that would help our students grow into critically reflective learners and ‘intellectuals’, as defined below and illustrated in the Student Development Model on page 164. Echoing concerns expressed above about a declining verve for critique in the country, Jansen (2001:2) observed that “intellectuals emerge and flourish under two conditions: extreme repression (such as apartheid) or genuine democratic conditions – neither of which exists in South Africa ...”. Addressing a university with a reputation for having loyally served the apartheid government he describes an intellectual as:

- Somebody who speaks truth to power;
- Somebody who questions;
- Somebody who seeks and proposes alternatives;
- Somebody who is restless about the status quo;
- Somebody who traces connections between the disciplines ... and issues of social justice, equality and power;
- Somebody who demands respect not for the authority of credentials, but for the authority of being human....

(Jansen, 2001:5).
Our above interests located the course theoretically somewhere between Habermas' 'hermeneutic' or 'interpretive' or 'practical' and 'emancipatory' or 'critical' paradigms (Grundy, 1987; Schubert, 1986) or Saddington's (1992) 'progressive', 'humanist' and 'radical' theoretical traditions of adult education. This I considered compatible with Larochelle and Bednarz' (1998) 'radical' constructivist approach. It reflected our aim to promote not only deep levels of conceptual knowledge, but also elaborated knowledge (Coles, 1997) and autonomy and independence of thought (Barnett, 1990).

We thereby aimed to give learners more control and therefore more power over their knowledge than that associated with 'soft' constructivism (Larochelle and Bednarz, 1998) or Habermas' interpretive constitutive interests (Grundy, 1987; Schubert, 1986). While the latter goes a long way towards, for instance, promoting deep levels of learning (Entwistle and Ramsden, 1983), we considered 'soft' constructivism with its potential for domesticating our learners (Freire, 1994) inadequate and inappropriate in our context and for our purpose.

This approach assumed knowledge to be 'interested' and that Habermas' "knowledge-constitutive interests" (Habermas, 1972) did hold in education (Grundy, 1987). The more radical underpinnings reflected our emancipatory interests and our understanding of knowledge as a product of social process, subjective, value-laden, incorporating issues of ethics, social justice and democracy. We therefore aimed to demonstrate this through both teaching and learning processes and choice of content.

Students were required to adopt a position in decision-making processes and defend it with 'facts', acknowledging the interested and dynamic nature of knowledge. Drawing on Grundy's (1987:124) ideas of a 'critical community' we aimed to provide a learner-centred environment of egalitarian, democratic relationships conducive to mutual trust-building and risk-taking to promote critical reflection, respect for different positions and a capacity to develop personal views in response to emerging new ideas.
The content of the cases will be discussed in Part Two. It was selected for the curiosity we aimed to induce in our students through their topicality and relevance to our context. We drew on ‘reconceptualist’ ideas of Grundy (1987) and Cornbleth (1990) to emphasise the culturally or socially informed and therefore contestable nature of a ‘problem’. We aimed to use such content to foreground problems like power inequalities and social injustices, and to recognise ideological, historical and social factors that have shaped commonly held interpretations of, and typical responses to, the situation. Through such critically reflective processes and debates, we aimed to help students develop deep and elaborated understandings of related theoretical principles of accounting, economics and commercial law that would help them achieve good marks in those courses. At the same time we aimed to empower students with interests, understandings, and capabilities that would serve the interests of social reform so needed in our context.

This focus reflected Greene’s (1974:69) ponderings over “ways of arousing students to choose themselves as persons who are committed, responsible, involved” in the light of inequities and corruption besetting citizens round the world and so relevant in our context. Its relevance is clear from the contextual explication of Chapter One which indicated the inevitable ‘creep’ of individualism, personal ambition and consumerist tastes in urbanised black African society. While this trend reflected a ‘normalisation’ of our society in terms of developed nations, we were responding to the increasing frequency with which we heard students say they were “sick and tired” of politics, displaying disinterest in the country’s political past and future, and complacency about our hard-won democracy.

In view of our history and the fragile nature of our democracy this added to our interest in stimulating curiosity, self-criticism and a heightened awareness of cultural, democratic and moral issues. Similarly this reality supported our aim to promote opportunities for students to recognise (and resist if they wished) intellectual and cultural hegemony and issues of power and ideology (like race
and class). We aimed to encourage reflection on cultural difference, for instance, in terms of 'Western' tastes and attitudes; and the principle of freedom of expression, fairness and the rights of all to human dignity.

Clearly South Africa’s history influenced strongly this social focus and our concern that power and ideology should never again escape critique. However it was balanced with an interest in helping our students as individuals to recognise and benefit optimally from their new-found freedom from injustice, prejudice, unfair practices and racial and gender inequities and to develop fully as students and as human beings (Bell, 2001). We thus aimed to promote both intellectual development and greater social and political awareness, including a community consciousness, through teaching and learning content and processes.

There was, however, potential for conflict between our extended aims and the expectations of sponsors in terms of our critically reflexive discourse as discussed on page 34. Moreover, students could also find this approach confusing, first because of our different approach to, and understandings of, knowledge as socially constructed and contestable, and second, because of the informal, personal way in which we related to our students, to support them through their liminal curriculum experience. (This is pursued in Chapter Eight).

Conclusion

In this chapter we have looked at the background to the curriculum studied in the wider context of the University, its plans to change and the difficulties it experienced in implementing these plans. In the two chapters of Part One, we have thus come to understand something of the realities facing South African society and the University during this unique time of rapid change.
The contextual discussion of Part One has thus clarified the rationale for this research and explained the social, pragmatic nature of my interest in the kind of learning conditions that could improve learning outcomes. Having explored this background to the study, we are now in a position to understand the references made to the context of this unique time in South African history and the University's response to it, as the thesis develops.

The haste in which the course and evaluation were implemented, and the background to the reflections in Chapter Nine on universities' problems in implementing non-traditional curricula will be understood, for instance. We will also see the relevance of Part Two's investigation into the effectiveness of a holistic curriculum in meeting the 'whole student', existential needs of the learners. We will now look at the way that I sought to answer this question from the one course studied as a single case and we will do this in Part Two. In the Introduction to the Case Study, which follows, we will see how the next five chapters have been structured; the case study research questions; the time frame for this part of my work.
PART TWO:
THE CASE STUDY
INTRODUCTION

Having provided a context for this work, we now focus on the case studied in order to explore my answer to the case study question of whether the course, implemented in 1997, was an effective tool in enhancing learning. This answer will help address the main question about providing the kind of learning conditions that can improve outcomes. To this end Part Two is divided into five chapters, which enable me to discuss:

- the research method;
- the course as it was planned and developed;
- the implementation of the course;
- the course evaluation;
- the overview and critique of PBL in relation to the findings.

These chapters represent the discussion of a unique case studied. They will provide the data that confronted me with the further, reflective research questions explored in the remainder of the thesis. The chapters of Part Two are organised in this way so that I can first discuss the research methods in Chapter Three, exploring the method's strengths and limitations and explaining how the data were gathered, organised, analysed and reported. In this chapter we note the rushed nature of this work, the early stage of my development as a practitioner-researcher that it represents, and the lessons learned from the evaluation literature, qualitative research theory and specifically case study research which help to justify the approach.

In the following three chapters we will look at the planning, development, implementation and evaluation of the course as a single case study. In Chapter Four the focus will be the course plans and how it was developed in terms of the curriculum aims and objectives. Chapter Five is organised around assessing what went well and what did not in the implementation of the teaching and learning methods, including content choice, allowing us to
consider how successfully the plans for a learner-centred experience were put into practice. Then in Chapter Six the course is evaluated in terms of the course aims and objectives, which relate to the case study research question and sub-questions, set out below.

In Chapter Seven we finally consider, through the overview and critique of the PBL literature, the strengths and limitations of PBL as a theoretical framework for the curriculum explicated in the previous three chapters. The literature review's unusual position at the end of the case study is appropriate in this thesis, since I did not have the time to explore the literature fully until the course had been implemented. It was then framed not only by the research questions about the kind of learning opportunities that could affect the students' outcomes, but also by the first implementation experience and findings from the initial course evaluation processes. It was only at this stage that I realised that the approach the team had called PBL was not represented in the literature and that PBL did not, in fact, provide an adequate conceptual frame for our curriculum.

The case study question is used to help investigate whether we could create the kind of learning conditions that could enhance outcomes and it does so by asking about the curriculum's effectiveness in helping our students to think freely. Underpinning this are three sub-questions, which ask:

*Did the curriculum affect:*

- **academic growth, in terms of helping students becoming competent learners through developing the required knowledge, skills, approaches and attitudes?**

- **intellectual growth, in terms of inducing criticality through recognising the uncertainty of knowledge, problem-posing and autonomous thought, linking 'intellectual' ways of knowing to social awareness?**

- **personal growth, in terms of empowering students through the development of self-confidence, self-worth and assertiveness, and sharing power with them through an egalitarian, democratic experience?**
Their separation is artificial, in that each question was interdependent yet crucial on its own for guiding the investigation. Similarly, the three related course aims were perceived as inter-related, just as each of the three ‘legs’ needed to be properly worked to ensure each was strong enough to support the whole. Attention to each ensured that the whole ‘cooking pot’ of course objectives was stable, preventing it from capsizing and therefore losing the value of the ‘whole student’ approach represented by each course aspect.

The limited time frame within which we worked is set out in the table below.

**Table 1: Time-frame for this work**

<table>
<thead>
<tr>
<th>TIME</th>
<th>MAIN ACTIVITY</th>
</tr>
</thead>
<tbody>
<tr>
<td>15 August 1996 - 24 January 1997</td>
<td>Course development – planning course and writing cases</td>
</tr>
<tr>
<td>3 – 14 February 1997</td>
<td>Student orientation</td>
</tr>
<tr>
<td>17 February – 2 June 1997</td>
<td>Course implementation – iterative development and evaluation</td>
</tr>
<tr>
<td>June / July 1997</td>
<td>Preliminary evaluation based on examination results, questionnaire and interview analyses</td>
</tr>
<tr>
<td>August – December 1997</td>
<td>Course facilitator’s planning and developing course for 1998, based on preliminary findings</td>
</tr>
<tr>
<td>November 1997</td>
<td>Analysis of student responses from questionnaire survey of perspectives on year’s experience</td>
</tr>
<tr>
<td>January 1998 – April 2001</td>
<td>Further gathering of qualitative data and comparative analyses of examination results up to December 2000, by when 1997 intake expected to have graduated</td>
</tr>
<tr>
<td></td>
<td>Exploration of literature particularly on case study research, PBL and course evaluation</td>
</tr>
<tr>
<td></td>
<td>Writing evaluation reports</td>
</tr>
<tr>
<td></td>
<td>Identifying reflective research questions emerging from this work</td>
</tr>
<tr>
<td></td>
<td>Transferring the work from a Masters to a doctoral study</td>
</tr>
<tr>
<td>May 01 – May 03</td>
<td>Post case-study reflecting and writing</td>
</tr>
</tbody>
</table>
The time schedule reflected the Dean's preference for a 'learning-by-doing' approach in view of the possibility that emerging government policy would require the faculty to implement rapidly an adaptation of the curriculum for a wider body of students. The rushed nature of the project meant that it lacked in-depth preparatory research, including the exploration of research method, PBL or evaluation literature, until the course had been implemented and much of the data gathered.

Although I undertook the literature review independently, and took responsibility for the evaluation, the case study relates to a team effort and joint decisions about the data. This includes how they were gathered, interpreted and preliminarily analysed during its implementation and during the following semester as I began the course evaluation process. The case study therefore refers to 'our' observations, actions, decisions and discussions, and distinguishes my evaluator role and the course facilitator's individual role from the team's joint course development role, where we were acting independently or expressing individual views. It is thus an example of action research taking place between August 1996 to April 2001 as set out in Table 1 and throughout the case study there are indications of questions it raised for critical reflection in Part Three.

Having outlined the structure of Part Two, we will consider in the next chapter, case study research as a method for addressing the questions set out above and on page 18.
CHAPTER THREE

CASE STUDY RESEARCH

Having explained the structure of Part Two and how the five chapters are conceptualised in terms of a single case study, seeking to explore the relationship between the learning conditions provided and the learning outcomes, we will now consider the methodological issues that confronted me. We will discuss them in five main sections, which are:

- the purpose of the study;
- the research site;
- ethical considerations;
- the search for an appropriate method, with the following sub-sections:
  - experimental approach rejected;
  - quantitative methods in support role;
  - rationale for qualitative, specifically case study approach;
  - coherence of curriculum and research theory;
  - justifying 'insider' evaluation;
  - data collection, organisation, analysis and reporting.

It is acknowledged that the research began as an evaluation of a hastily developed, implemented and evaluated course, rather than a deliberate, rigorous research method and the case study does not pretend to represent much more than a course team's critically reflective approach to their practice and my retrospective research. Through this chapter I will argue, nevertheless, for the value of case study research in promoting contextual learning, and that it was an appropriate method for exploring the effectiveness of the course in improving learning opportunities for our students. To this end, we will consider evaluation literature and qualitative, specifically case study
research theory, and the strength in this study’s relation to critical praxis, and consequent coherence between curriculum, evaluation and research theory. We will also note some lack of ‘scientific’ rigour in the study, like my role as an ‘insider’ researcher which is re-visited in Part 4 in relation to an argument for the value of practitioner-research.

Finally, we will look at how the data were gathered, organised, analysed and reported for reference throughout the case study, noting the strengths in the, multiple perspectives of the course team, data checking processes and the statistical analyses which enhanced the richness and trustworthiness of the data. We will note the thoroughness of these processes and the sincerity of the aim to enhance the method’s potential strengths and to limit inherent weaknesses in the approach, in order to understand better the curriculum studied.

While we will see the roughness of the questionnaires (Appendices 6 and 7) and interview questions (Appendix 5) related to the speedy, ‘learning by doing’ approach urged by our Dean, we will note also the detailed notes that were kept of the team’s course development and session evaluation meetings. This will explain how I could track our deliberations during the planning and implementation stages (elaborated in Chapters Four and Five) and access data that helped me assess the strengths and limitations of the course in terms of achieving its objectives (Chapter Six).

**Purpose of Case Study**

The supporting question underlying the case study was whether the course was an effective educative tool for our students and for our purpose. It reflected the need to develop the best possible learning opportunities for our students to promote the kind of academic success that would ensure continued private sector funding. There was therefore no vested interest in ‘proving’ it ‘worked’, but rather in exploring its strengths and shortcomings to
inform further developments. It was possible that the study might extend, as a by-product, theoretical curriculum knowledge.

The Research Site

Course development processes began in 1996 and the problem-based course was 'piloted' in 1997 on forty-nine students. This provided a suitable research site in that the study was bounded by its focus on this distinct group, primarily in 1997, but also encompassing their progress up to 2000. This enabled us to work very closely with the students in 1997 in a situation where we had the autonomy to make spontaneous curriculum decisions in response to reflexive processes, a subject for reflection in Part Three.

Ethical Considerations

While students were given no choice in being part of this study they were not coerced into participating in, or attending, data-gathering processes and meetings. They were able to choose the extent to which they would participate (whether they would fill in a survey, attend an interview, the degree to which they would participate in discussions and the depth and consideration they would give to answering open-ended questions). The 'findings' show the students generally co-operated willingly and fully with relatively few nil returns or instances of non-attendance at data-gathering procedures. While some did choose to participate less fully, offering scantier information for instance in interviews, in open-ended survey questions or discussions, written responses were anonymous and no reference was made to any non-attendance or 'thin' responses to demonstrate students' right not to participate or give information.

We attributed the high level of co-operation largely to the environment of mutual respect and trust developed through the supportive and nurturing, democratic, egalitarian environment. However the students' sense of 'ubuntu'
was probably an important factor in that their input was being used to improve the course for the following year’s student intake. The overlapping of my position as director of the programme, member of the course development team and course evaluator would clearly have had some impact on both staff and students and I sought to limit this through a democratic, egalitarian and critically reflective approach. Issues of being an ‘insider’ evaluator are discussed below.

Evidence of close relationships developed between staff and students in 1997 (and thereafter) suggested students were not antagonistic towards our attention and interest. The nature of the ongoing informal data gathered throughout their undergraduate years, and thereafter in some cases, in fact indicated relaxed and friendly relationships and a sense of being important stakeholders in the course development process. While the frequent data-gathering procedures were tedious for students they participated generously and even enthusiastically, indicating a sense of empowerment from our relation as co-learners, the open conversations we had about the course and democratic, interactive data-gathering processes.

Following MacDonald and Walker (1975) the data-gathering processes incorporated participants’ right to confidentiality, negotiation and accessibility. Students were urged to express their views and invited also to speak or write (anonymously) to any member of the staff. Students (like staff) had rights of access to documented data though in reality students showed little interest in exercising them. They did participate, however, in cross-checking my interpretations through ongoing feedback procedures, thereby exercising rights of access and of negotiating, challenging or approving my interpretations, for further adjustment if applicable.

In both course development and research role I sought to promote what Fleury (1998:156) after May (1992) called a “... moral, cultural, pluralistic ... ‘ethic of caring’ and a critical pragmatism” that refused to rationalise and reduce the complexities to something simple for ease of understanding. Indeed following Tripp (1998:38) the study aimed to be socially just in “both research content
and process. Firstly it examined meaning "with a view to improving it ... in both effectiveness and social justice" and secondly it adopted a "typical action inquiry approach" promoting social justice amongst participants and in the use of findings.

I recognised the moral implications of data-gathering techniques and that my credibility and trustworthiness in the eyes of participants depended on coherence between my own personal values and those underpinning the course and the study. I also tried to consistently model a "moral position" in my interaction with participants that was as "authentic and honest" as I could be, and with which I was therefore comfortable (Carspecken and MacGillivray, 1998:180). This would, I hoped, enhance the quality of participants' interactions and therefore enrich the study.

My approach was based on the understanding that for a critical study to be ethical it needs to focus on participants co-operating and treating one another with respect, and understanding the purpose of the study. The course team's energy and idealism reflected our belief that we had something important to share and the optimism of the time. This affected positively the sense of commitment and the quality of our interaction as co-learners, whether we agreed or argued, for which I am deeply indebted to the team. Indeed, having set out on this process it would clearly have been difficult for any member to withdraw without feeling they were letting the others and the project down, but at no time did anyone indicate diminishing interest in the project.

The Search for an Appropriate Method

I sought the most appropriate research method to answer the above research questions, to inform the course development process and to provide coherence with our practice in terms of its underpinning philosophy.
Experimental Approach Rejected

Bearing in mind the Dean's interest in offering the course to other groups in the faculty we toyed with ideas on how this could be done and how it would impact on students outside the programme. Indeed the facilitator offered to 'teach' a second group of fifty students as a 'control' group.

The 'control' group in such a scenario would not enjoy the benefits of the wider curriculum discussed in Chapter Two. I considered possibilities for thereby 'isolating' the effects of PBL from the effects of the wider curriculum by comparing their examination results, using the control group to draw conclusions about the impact of PBL. However, this raised ethical problems in terms, for instance, of how it would impact on the workload of those students (with possible cost implications if studies were consequently prolonged) and how the group would be selected.

Stenhouse (1975) inter alia warned of problems with establishing a 'control' group in the social sciences. Students could not be selected on the same criteria as those in the programme for instance, and there would be numerous human-related variables to make 'scientific' comparison invalid. Similarly the research's rigour was not related to considering our students as a representative sample based on which statistical generalisations could be applied to other contexts with different student groups. At the same time it could not claim the 'validity' of a widespread study of different populations that could draw quantifiable conclusions. On consideration I decided a comparative approach was unsuitable for my purpose. It would not indicate strengths and limitations of the course, where or how it could be improved and it would therefore be of little use to us in informing improvements to the course. I did not aim to prove the practice 'worked' and recognised that such a social science study could not, in any case draw simplistic conclusions (as 'truths') about realities that were complex. They could not be broken into components that were studied independently and separately from their contexts. This would assume a researcher to be 'objective', producing
‘uninterested’ facts in isolation of any meaning subjectively attached to them and would contradict the practice’s theoretical underpinnings.

Quantitative Methods in Support Role

In view of the data needed to answer the questions, and the purpose of the study, it would trivialise the practice to try measuring its effect in quantitative terms alone, disregarding the above. This view was supported *inter alia* by Laurillard (1979). Nevertheless quantitative data were important not as ends in themselves but for what could be learned from them, and how they would enrich the whole ‘picture’ and provide opportunities for triangulation. To this end, and supported by Guba and Lincoln (1989), there was a place in this study for quantitative data in the form of comparative analyses of examination grades of ‘our’ and ‘other’ students across all courses. (All students had in common the faculty’s entrance requirement in terms of points earned through the standardised matriculation examination). Quantitative data were thus used as the basis for a qualitative exploration of the relation between student grades and the impact of the course and the data statistically analysed as discussed below. The data represented the grades of all ‘our’ students and ‘other’ students in each course. The grades of all students were accessed through the centralised University system.

*Chi-squared Analysis*

Shaun Dippnall, a part-qualified actuary, statistician and lecturer from the University’s Department of Statistics tested my data for statistical significance. He advised me that Chi-squared tests were the most appropriate for producing valid statistical analyses, for my purpose, in view of the categorised nature of the data. These represented the distribution of marks for two groups of students drawn from examination results. He applied two kinds of tests to show whether there was a high or low probability of a positive relationship between the course we offered ‘our’ students and their academic
performance, relative to 'other' students who did not read our course. Since
he found the probability of no relationship (independence) to be small, the
tests indicated a very high probability that there was a relationship that
showed that 'our' students achieved better examination grades than 'others'
did. (In one set of level 3 examination data the relationship was negative, but
with subsequent curricular intervention, this has been reversed, as discussed
in Chapters Six and Eight).

Test One was used to analyse four categories of data (first-, second- and
third- class grades, and 'fails') against two groups of students: 'our' and 'other'
students (the 4x2 test). Test Two gave an analysis of two categories of
grades achieved (above, and including 60%; and below 60%) against 'our'
and 'other' students (the 2x2 test).

Test One
Given a table of results of the test scores of students:

<table>
<thead>
<tr>
<th>'Our' Students</th>
<th>'Other' students</th>
</tr>
</thead>
<tbody>
<tr>
<td>1st Class Pass</td>
<td>( O_{11} )</td>
</tr>
<tr>
<td>2nd Class Pass</td>
<td>( O_{21} )</td>
</tr>
<tr>
<td>3rd Class Pass</td>
<td>( O_{31} )</td>
</tr>
<tr>
<td>Fail</td>
<td>( O_{41} )</td>
</tr>
</tbody>
</table>

Where,

\( O_{ij} \) is the number of observations in cell \((i,j)\), and,

\( \pi_{ij} \) is the probability of an observation in cell \((i,j)\)

The null hypothesis \((H_0)\) of this test is that 'other' students perform better than
'our' students:

\[ H_0: \quad \pi_{11} < \pi_{21} \]
\[ \pi_{21} < \pi_{22} \]
\[ \pi_{31} > \pi_{23} \]
\[ \pi_{41} > \pi_{24} \]
If the probability of $H_0$ is significantly small, then $H_0$ can be rejected in favour of $H_1$:

$$H_1: \quad \pi_{11} > \pi_{21} \quad \pi_{21} > \pi_{22} \quad \pi_{31} < \pi_{23} \quad \pi_{41} < \pi_{24}$$

To test $H_0$, Pearson's Chi-Squared Test statistic is calculated:

$$\chi^2 = \sum_{i=1}^{2} \sum_{j=1}^{4} \frac{(O_{ij} - E_{ij})^2}{E_{ij}}$$

Where,

$E_{ij}$ is the expected value of the cell $(i, j)$, and,

$O_{ij}$ is the observed value of the cell $(i,j)$

The Test Statistic (with 3 degrees of freedom) finds the probability that $H_0$ is true. Higher values of $\chi^2$ mean a lower probability of $H_0$ being true.

A corresponding $p$-value (probability of $H_0$ true) is calculated for the $\chi^2$ value. This gives grounds to reject or accept $H_0$. For $p<0.05$, it is assumed that $H_0$ is false and that $H_1$ can be accepted.

**Test 2**

Given a table of results of the test scores of students:

<table>
<thead>
<tr>
<th></th>
<th>'Our' Students</th>
<th>'Other' students</th>
</tr>
</thead>
<tbody>
<tr>
<td>Over 60%</td>
<td>$O_{11}$</td>
<td>$O_{21}$</td>
</tr>
<tr>
<td>Less than 60%</td>
<td>$O_{21}$</td>
<td>$O_{22}$</td>
</tr>
</tbody>
</table>
Where,

\( O_{ij} \) is the number of observations in cell \((i,j)\), and,

\( \pi_{ij} \) is the probability of an observation in cell \((i,j)\)

The null hypothesis (\( H_0 \)) of this test is that 'other' students have a greater chance of achieving more than 60% than 'our' students:

\[ H_0: \pi_{11} < \pi_{21} \]

If the probability of \( H_0 \) is significantly small, then \( H_0 \) can be rejected in favour of \( H_1 \):

\[ H_1: \pi_{11} > \pi_{21} \]

To test \( H_0 \), Pearson’s Chi-Squared Test statistic is calculated:

\[
\chi^2 = \sum_{i=1}^{2} \sum_{j=1}^{2} \frac{(O_{ij} - E_{ij})^2}{E_{ij}}
\]

Where,

\( E_{ij} \) is the expected value of the cell \((i,j)\), and,

\( O_{ij} \) is the observed value of the cell \((i,j)\)

The Test Statistic (with 1 degree of freedom) finds the probability that \( H_0 \) is true. Higher values of \( \chi^2 \) mean a lower probability of \( H_0 \) being true.

A corresponding \( p \)-value (probability of \( H_0 \) true) is calculated for the \( \chi^2 \) value. This \( p \)-value gives grounds to reject or accept \( H_0 \). For \( p<0.05 \), it is assumed that \( H_0 \) is false and that \( H_1 \) can be accepted.
Thus these tests could be used to support or contest qualitative data, just as the qualitative data could help me make sense of the statistical test results. The high degree of certainty in believing that 'our' students performed better academically than 'other' students accorded with the qualitative data that indicated the curriculum experience had impacted positively on their learning.

Rationale for Qualitative, Specifically Case Study Research

Before considering the rationale for the research method selected, the concept of case study research needs some discussion.

Case study as qualitative research

Stake (1988:258) defined it as a "study of a 'bounded system', emphasizing the unity and wholeness of that system, but confining the attention to those aspects that are relevant to the research problem at the time". He argued that the organisation of the social data should preserve the "unitary character of the social object being studied". Yin (1984:23) similarly defined case study as an empirical inquiry investigating "a contemporary phenomenon within its real-life context" with no evident "boundaries between phenomenon and context". He stressed also its use of "multiple sources of evidence".

The case study focused on the "search for an understanding of the particular case, in its idiosyncrasy, in its complexity" (Stake, 1998:256). While researchers may or may not have an interest ultimately in generalising their findings they would focus on the "uniqueness of the individual case" in its natural setting "so as to understand it in its own habitat" rather than search for what was "common, pervasive and lawful" in the study.

MacDonald and Walker (1975:9) similarly spoke of the significant role of case study research "in the history of learning theory", arguing that rather than aiming primarily at proof, the inquirer should "aim to increase understanding of
the variables, parameters and dynamics of the case under study”. At the same time they suggested case study researchers should “find ways of portraying this experience and this milieu so that prospective users of new programmes (could) relate them to their own experience, circumstances, concerns and preferences”. Clearly the difference was not just in its method but case study research commonly incorporated “carefully planned observations in natural settings and use(d) interviews, qualitative analysis and narrative reports” (Stake: 1998:256).

**Rationale for case study approach**

The study was to be practice-based and inseparable from its context, unique in terms of South Africa’s political and cultural history. It therefore held promise for an interesting single case study that might even serve a revelatory purpose (Yin, 1984) in that it could provide an opportunity to explicate a fairly rare curriculum and pedagogical phenomenon and thereby contribute to those discourses. Stake (1988:254) similarly argued that despite its contextualised nature a case study could be a “precious discovery” when it “portrays an educational problem in all its personal and social complexity” and thereby help solve problems of education.

The research questions demanded a subjective in-depth qualitative contextualised study to explore the strengths and shortcomings of our practice in terms of its effect on students. Traditional research methods could not answer questions about the participants’ experience in relation to “the nature and variety of transactions which characterise the learning milieu of the programme” (MacDonald and Walker, 1975:2). Unsure of what I would ‘find’ at the end of it, such research would aim to portray the practice in its complexities and in relation to its context so that readers could judge for themselves if it had relevance to their contexts or interests.

In choosing an appropriate research strategy I was driven by the same theoretical interests, assumptions and beliefs that framed our practice and
which are elaborated below in relation to research method to decide a case study would most suit my purpose. However the shortcomings inherent in case study research would have to be limited and some thought was given to how this would be done. Drawing on MacDonald and Walker (1975:5) and Walker (1983) there was first the problem of subjectivity, bias and distortion in, *inter alia*, the kind of data sought, and their subsequent interpretation, in terms of producing rigorous findings. The researcher could become involved in the “issues, events and situations under study” particularly so in my ‘insider’ status discussed below. Indeed this links to problems of the reader not being able to discern what were data and what was interpretation. Second were problems of data confidentiality as discussed above. Third was the potential for problems of access to and control over data from different stakeholders. Fourth were publication problems particularly related to the anonymity of subjects.

With regard to the first issue of subjectivity, even if the findings were considered ‘reliable’, it was acknowledged they would not produce scientific ‘truth’ about what could (or could not) be achieved through PBL and could end with no more than a hypothesis. Practitioners applying similar approaches in different contexts could never assume the same outcomes, hence the contextual discussion of Part One and my reflections in Part Three on the study’s transferability. Supporting this focus Crossley and Vuillamy (1984:193) argued for the importance of “grounded representation” of educational realities and (quoting Spindler, 1982) the usefulness of “in-depth, accurate knowledge” of a particular setting, in limiting shortcomings inherent in case study research.

The study aimed, also, to portray a detailed, rich picture of the practice, including our team deliberations and reflections and those of students, to enable readers to judge for themselves the trustworthiness of ‘findings’ in relation to our context, and the applicability of elements of the work to their practices. It thereby held promise for promoting new insights (and perhaps useful dialogues) amongst PBL practitioners and educational theorists.
Students and the course team were involved in knowledge construction processes and critical reflection on the experience. Together we explored its strengths and limitations from our various perspectives. To encourage students to express their opinions openly and honestly, and to understand that we did indeed want negative feedback, evaluation processes were coherent with the teaching and learning processes in the classroom, with their focus on critical reflection and egalitarian, democratic, co-learner relationship with staff. Theoretical underpinnings of pedagogy, course development and evaluation provided coherence and validity for the case study and the kind of trust needed to promote openness and 'risk-taking' in offering a different view – both in the classroom and in reflecting on the classroom activities. This was re-enforced by our ability to implement course changes in response to student suggestions wherever feasible and discuss how they will input on the following year's course where applicable.

The study benefited also from the multiple perspectives of a team of 'investigators' that enhanced the quality of data emerging from our various interests, worldviews and reflexive deliberations. Aside from the white woman administrative manager, from a racial and gender standpoint there were two white women from inside the programme and one white woman from outside involved in course development processes, observation and critical reflection after each session, with me in the evaluator role as described in the introduction. There was one black African man from inside the programme involved in course development deliberations and reflections and he implemented the course as the facilitator.

In addition, from outside the team, but inside the programme was a black African woman who managed the student recruitment programme and therefore knew the students personally in terms of their home and school backgrounds. She had (and still has) a role in the programme of student 'confidant'. Without breaking any confidences she was able to contribute perspectives from outside the team as and when they arose. Thus we all represented different elements and degrees of 'insider' and 'outsider' status.
(Merriam and Johnson-Bailey, 2001) that would influence the kind of data we would glean from students.

While we shared a determination to meet our learners' needs, help them achieve good grades and provide an emancipatory experience, there were clearly differences in our perspectives, experiences, knowledge, skills, priorities and interests that enriched the study. The course notes (13 December 1996) reflect on the team's strength arising from its diversity. The facilitator was considered "central to the process because of his knowledge of the subject-matter"... (Only he and the recruitment manager had degrees and postgraduate degrees in Management Studies). "He is also skilled in preparing the cases or scenarios that will enable the course to be taught as an interdisciplinary course, and he has experience derived from working with the students in 1996".

The input of the second white woman from inside the programme was "in the area of philosophy and understandings about knowledge, and broadly in the field of education, including experience of the students in 1996". The role of the white woman from outside the programme was "to facilitate the processes of developing the course, in which (she) had some experience as well as theoretical understandings". She also had "some knowledge of what is happening elsewhere in the University (as head of the University's academic development unit), and should also be in a position to articulate this work with new developments in national thinking (policy) in Higher Education". She also had some experience of working with our students in previous years. Her participation was particularly important not only because of her knowledge, experience and expertise but also for the 'peer scrutiny' and 'peer debriefing' (Guba and Lincoln, 1983; 1989) role she played in helping limit subjectivity problems.

The multiple perspectives of the team and students, and the data gathering processes which emphasised the value of this diversity thus helped limit the problems of bias and subjectivity and the researcher's involvement in the practice and the programme. They also enabled ongoing cross checking or
triangulation of data (Guba and Lincoln, 1989) and data interpretation throughout the course’s implementation and, to a lesser extent thereafter.

But would the ‘findings’ be considered reliable or trustworthy? And if they were, to whom would they in fact be useful? This study was guided *inter alia* by Stufflebeam’s (1981) Joint Standards for Evaluation of Education Programmes, Projects and Materials; Guba and Lincoln’s criteria of rigour or trustworthiness within a naturalistic paradigm (1981, 1983); their fourth generation criteria (Guba and Lincoln, 1989:228); Catherine Marshall’s (1990) “goodness criteria”; Yin’s (1989) evaluation principles; Habermas’ criteria presented by Grundy (1987) and Aoki’s (1991) evaluation concerns associated with different forms of knowledge. It therefore aimed to be as rigorous as it could so that there would be possibilities for application of certain elements to different contexts by fully informed readers.

The third problem raised by MacDonald and Walker (1975) related to data management. Analyses of surveys and interviews (see Appendices 5 and 6) were discussed with students in forums for further discussion. All raw data in the form of notes of team meetings and student feedback and preliminary analyses were kept in an easily accessible file in the administrative manager’s office. Copies of all documents were also distributed to each team member for comment and adjustment, or cross checking, with the final agreed version being filed for future reference. The data were thus available to any team member for reference or for research purposes. Thus problems of access to or control of data were limited. In fact a copy of the file was made for the course facilitator’s reference when he began to write a ‘teachers’ manual’ in 1998.

The fourth potential problem related to publication, particularly to the anonymity of subjects. Students were unidentifiable in the case study of part Two, and a paper written jointly for an educational conference (Hesketh and Ngubane, 1998). However, the course team members could be identified in this case study by any reader wishing to undertake some investigation through university records, or any reader who had known the programme in
1997. However all team members had encouraged me to publish the data in the form of a dissertation and/or thesis and were eager to have our work documented in this way for the purpose of contributing to academic development particularly in South African universities. Indeed the facilitator (team meeting notes, 15 August, 1996) suggested one piece of research could reflect the “process of developing the curriculum” and the other “the evaluation of the product”. However no research besides this work has been undertaken.

While data gathered up to mid-1999 and the beginnings of my analysis up to then were discussed and cross-checked for interpretation, subsequent writing which formed the basis of Chapters Five and Six, were checked and approved by the only two remaining team-members, the philosopher and the administrative manager. The judgment of my colleague just completing a doctoral study in philosophy, with a particular interest in ethics, was particularly valuable. She assumed a 'critical reader' role of my assessment of both the course development and implementation processes and considered it “even-handed, capturing the complexities and intricacies of the experience, the way it was, the conversations and the differences we had”. She also supported my view that it was “important to reflect the good and the bad times because of what can be learnt from the experience” (Skinner, 1999).

The two team-members who had moved away from the area and out of university education have not seen the post July 1999 reflections. While this would have been preferable I have no reason to believe they would have disagreed with my interpretation even where it involves differences of opinion, or that they would not have encouraged me to publish this work as originally planned.

Despite the potential limitations in case study research, the above points indicate it was a methodology suited to my purposes and I worked to limit its shortcomings. Achievement of these ends, however, depended a great deal on the environment of mutual trust and openness, which gave team-members
and students the freedom to think independently and express their opinions. Fundamental to both research and practice was therefore the same kind of learner-centred, democratic, egalitarian environment described above in relation to the course.

Coherence of Curriculum and Research Theory

Theoretical coherence between practice and research and team-members' worldviews was indeed vital to the trust this study relied on for quality of data and data interpretation. Evaluation literature confirmed the compatibility of emancipatory interests and values with qualitative and case study research despite the concerns raised by Walker (1983) about its conservatism. This section locates qualitative research, specifically case studies in critical praxis (Schubert, 1986; Grundy, 1987).

The research could not be separated from political or ideological issues, particularly in our specific context and was indeed strengthened by its emancipatory interest (Firestone and Skrtic, 1990; Fleury, 1998; Larochelle and Bednarz, 1998; Popkewitz, 1984; Shacklock and Smyth, 1998). Mirroring our curriculum approach, this study thus developed knowledge constituted by and for interpretive and emancipatory interests, and used eclectically technical knowledge too to help advance its purposes.

Popkewitz (1984:35-50) and Aoki (in Belland, 1991:65-81), amongst others, appropriated Habermas' theory of knowledge and interpreted their distinct sets of values and in terms of educational research. Aoki called them the “ends-means (technical) evaluation orientation”; “situational interpretive evaluation orientation" and "critical evaluation mode orientation", providing a basis for considering evaluation approaches alternative to the traditional. This study reflected the understanding that in the social sciences ‘truth' was not attainable, and that it was indeed sometimes rational to be relativist (Skinner, 2000). The study thus reflected the same assumptions about epistemology and society that underpinned the practice.
The study was sensitive to the various perspectives of participants following Guba and Lincoln (1981, 1983, 1989), Guba (1990) and Patton (1987) to explore how PBL impacted on learners. It focused on how they (and the course team) interpreted and valued the experience. Holistic data emerging through a naturalistic approach and ongoing critical reflection (Schön, 1983, 1987; Boud and Walker, 1992) helped us decide how the course functioned in our context, where it ‘worked’, how and why. The case study thus offers readers a feel for the programme with its underlying values and for participants’ experience in their specific context as advocated by Cronbach (Shrinkfield, 1983). As a result they can judge with me the value of the course in our context, and form opinions on my interpretation.

Although I acknowledged the centrality of the constructivist interest to this study, my position was less relativist than Guba’s (1990), accommodating emancipatory interests in the dialectic between theory and practice, as supported by Austin (1990). This was reflected in the need to establish what for me was a ‘true’ reality, for the purpose of transforming it. Just as I argued the course’s interpretive approach was enriched by its critical edge so did I argue for a critical slant to the study. Acknowledging difficulties related to the subjectivity of any reality, this study sought to ‘take a stand’ to enhance its usefulness. The course team’s input enhanced the possibility of presenting a specific interpreted ‘reality’ as ‘true’ within the context of the study. In Grundy’s terms (1987:132) critical praxis meant critiquing our curriculum by “look(ing) back at theory and, while trying to make meaning of it, critically examin(ing) its value for practice”.

Data were thus not simply found. As advocated by Grundy, 1987 and Guba, 1990) findings emerged from “the residue of a process that literally create(d) them...a human construction, never certifiable as ultimately true but problematic and ever-changing” (Guba, 1990:26). It required participants to be reflective in the evaluation process. Moreover this study acknowledged data to be produced according to the team’s interests and values. As in the practice the study embraced a wariness of the capacity for beliefs, values and
power structures to hide and shape the 'truth' (Grundy, 1987; Smyth and Shacklock, 1998; Foucault, in Ball, 1990; Gramsci, in Jarvis, 1987 and Grundy, 1987; Lawton, in Jarvis, 1988). This led to a consciousness of the epistemological assumptions influencing my questions, how I asked them, how I sought answers to those questions and how I presented my findings. The study thus incorporated reflexivity through self-criticism and awareness of the ethics and politics of my power relations with other participants (Smyth and Shacklock, 1998:7).

It was guided by Grundy’s (1987:139) argument:

... if the process of curriculum development is informed by principles of equality, enlightenment and emancipation, it ... becomes important to be able to judge the quality of the learning and decision-making environment and the basis upon which claims to truth are being made. Thus, evaluation does not simply look at the work of learning, but embraces a critique of what is learnt as well as of the interactions which comprise the learning situation. All the time the criteria by which the quality of learning is to be judged are those relating to the degree of autonomy and equality experienced by the members of the learning group


This raised issues of power and empowerment in the evaluation process and in the classroom. As both programme director and evaluator uneven power relationships begged consideration, as discussed below, in relation to my 'insider / outsider' status. For the study to achieve its purpose, and to reflect the same interests as the practice, potential power-related problems needed to be limited.

First there was the choice, coherent with my professional style, not to exercise power (Popkewitz, 1984; Tripp, 1998) but to involve participants in critical reflection, examining assumptions, implications and consequences and democratically negotiating understandings. This choice enriched the study's
findings and conclusions through exposure to multiple perspectives, helping me to understand my position as well as those of the students and team members (Tripp, 1998). At the same time it reinforced the democratic, egalitarian learning environment promoted by the practice.

By foregrounding differences amongst participants, the study could, moreover, enrich my own and the readers' understandings and help us discern areas of potential distortion and recognise limitations or agendas. Indeed I sought to avoid the faulty reasoning associated with the selection of evidence and ignoring of "disconfirming evidence" (Fleury, 1998:162), by highlighting different perspectives. (However my power-sharing strategy was not entirely positive as there were some implementation difficulties raised in Chapter Five for reflection in Part Three).

As an example of reflective, action research (Grundy, 1987:143) it "reflexively interrelate(d) understanding and improvement, knowledge and action, theory and practice" focusing on both participant involvement and course improvement. Thus it demonstrated to students a critical stance towards the course, supporting the course aim of encouraging learners to develop a critical worldview. Both course and study imposed on students our critical values, illuminating a contradictory situation (Tripp, 1998:37) in which we strove to be "critical about everything except being critical". However, this was limited to our interest in giving students the freedom to think, to develop critical attitudes and approaches to knowledge (and the course experience). It did not involve the imposition of any specific ideas or values and we made this explicit. Similarly this study acknowledged my presence in the text, making no assumption that I was "a neutral actor in the research" and making explicit my educational and professional interests and values in Part One and in the thesis Introduction.

In this way, students experienced course evaluation processes and their underpinning values as an extension of, and natural progression from, teaching and learning practices and their ideology. Through involving them in critically reflective knowledge construction processes, interpretation and
judgment, the study mirrored classroom learning processes. In this way they were relatively well prepared and well informed to participate reflectively and effectively in the case study. Moreover, I sought to make the study socially just, asking myself questions like whose interests were being served by the study and how, and what knowledge would be accepted as true, by whom and for whom (Aoki, 1991; Grundy, 1987; Tripp, 1998).

In terms of Smyth and Shacklock's (1998) suggested 'critical frames', the study did thus incorporate a critical edge to reflect values and interests coherent with the practice itself. Indeed the "shared radical consciousness" of the course team and, to an extent, the learners, who had the opportunity to "work together over a considerable period of time", provided an emancipatory opportunity that Tripp, according to Marsh (1997) found rare in action research.

**Justifying 'Insider' Evaluation**

Merriam and Bailey (2001) demonstrate the complexities and nuances in researchers conceptualising themselves as 'insiders' or 'outsiders' and the reality of being 'insiders' in some respects and 'outsiders' in others. With same-race researchers, for instance, they found differences in age, gender, skin-colour, educational and economic status and experience to make 'outsiders' of them in the minds of the researched. In these terms a strength of this study was in the team of co-gatherers of data whose multiplicity of interests were pursued in interviews, informal and semi-formal, and whose various perspectives were brought to bear in interpreting data.

Augmenting the variety of perspectives was our black African female academic colleague in the programme but outside the team. As manager of the student recruitment and selection programme, she related differently to the students, provided a 'friendly ear' and often assumed the role of counsellor to students. Without breaking confidences she could thereby enrich the insights gained on the course, as an 'insider in terms of ethnicity,
although still an 'outsider' in terms of factors like age and gender, in some cases. (She also enhanced the diversity of our team with an ethnicity different from the facilitator's).

Furthermore, from inside the team the black African facilitator's input was vital to accessing different kinds of data, representing also an 'ethnic insider', while an 'outsider' in terms, for instance, of his staff status and age. In interviews, for instance, differing data emerged from 'insider' and 'outsider' interviewers in terms of racially-, ethnically- and culturally-determined statuses as the researched took it for granted that certain information was understood by an 'insider' and unnecessary to explain. On the other hand they could feel it would be too embarrassing, too difficult and not worth trying to explain certain kinds of perspectives to an 'outsider' towards whom there would also be more reserve (Merriam and Johnson-Bailey, 2001).

We were thus all 'outsiders' in terms of age and being university staff, but all 'insiders' in terms of working within the same programme in the same University, and in our interest in the students' experience. The team's variety of perspectives, interests, roles, student relationships, personalities, race, gender, ethnicity and culture all helped enhance the strengths and minimise the limitations of evaluating the practice from within the programme. It limited the shortcoming of being personally involved in issues relating to the study, bias in data gathering and interpreting, as did the mechanisms for deliberating and cross-checking data. On the other hand, it limited the disadvantages of my 'outsider' status particularly in terms of being white, the director of the programme, and for men students, being a woman. Nevertheless this reality will impact on the reflections in Part Three about this study's applicability to other contexts.

Having noted the above nuances in categorising 'insider' or 'outsider' researchers, the following discussion justifies my role as a practitioner-researcher working within the programme, as opposed to an evaluator from outside the programme. (A programme 'outsider' would have little first-hand knowledge of the practice, the course team, course development and
implementation processes, and of the students). It focuses on involvement and bias, subjectivity, power issues of ownership and professional status, and possibilities for limiting cultural barriers to student communication.

First is the question of involvement and bias, which was limited by the study’s purpose. There was no incentive to prove the course effective, but plenty of incentive to develop optimum learning opportunities to help students achieve good grades in their courses and demonstrate the kind of communication skills and self-confidence the sponsors sought in future employees. The study’s purpose was therefore to promote understanding to inform decisions for improvement and future application. The outcome of this study would have no bearing on the programme’s funding beyond its informing how and where to improve the practice.

Nevertheless there were clearly questions about my lack of neutrality, but I argue that this applies to all researchers, including ‘outsiders’. Indeed by their human nature ‘outsider’ evaluators are also biased, and particularly so in social science research that is historically and culturally situated and responds to particular political issues (Firestone, 1990; Popkewitz (1984).

Secondly, to limit the subjectivity problem I made explicit my values and interests, in relation to the context, to help readers discern where my biases influenced findings and adjust them according to their own view of ‘reality’. As an ‘insider’ evaluator I interacted constantly within the practice in multiple roles. These included observer, course developer, researcher, director and ‘mother-figure’ - for which I have been regularly teased since the programme’s inception. I could therefore paint a more colourful, nuanced and complex picture of the practice in its natural setting, than an outsider could achieve. This view was supported inter alia by Carspecken and MacGillivray (1998); Nevo (1983); Grundy (1987); Guba and Lincoln (1983, 1989); Kemmis and McCormick and James, according to Weiss, J (1989); Schubert (1986); Stake (1972, 1974); Stenhouse (1975); Weiss, C (1983).
Indeed critical theorists like Grundy (1987) and Street (1998) argued that emancipatory research could best be achieved from 'inside' when "the locus of control for making judgements about the quality and meaningfulness of the work" lay "with the participants in the learning situation and not elsewhere" (Grundy, 1987:127). Furthermore the constructivist / critically reflective approach had some built-in 'quality controls'. I iteratively cross-checked my understanding and interpretations with students and course developers, making them "arbiters of adequacy" (Firestone in Guba, 1990:112). This ensured reflexivity and helped me maintain my reputation for being "honest and ethically mature" (Smyth and Shacklock, 1998:7).

Third were power issues of ownership. Using an 'insider' avoided some of the external political pressures and power issues relating to, for instance, who needed the knowledge and for what purpose; who would fund the study; who then 'owned' the knowledge and decided what would be published; and who would benefit from it. Indeed this research developed from a course development project considered part of our jobs, and reflected our shared deep interest in academic development and its potential for social impact, as well as an interest in the programme's survival. Our energy was harnessed by the offer of the 'outsider' curriculum specialist (head of the University's academic development unit) to work with us as part of her brief to help transform the University through curriculum development processes). Her time spent on this project was therefore formally accounted for, with no exchange of money. The data were owned by all of us and available as a reference for further curriculum development work or academic papers.

Fourth, issues of power attached to my professional role in relation to the course team were limited. There was a relatively 'flat' hierarchy of reporting structures, reflecting a personal leadership style, and a shared aim to promote a learner-centred and democratic environment, as discussed in terms of 'learning organisation' principles in Chapter Nine. Furthermore, in my role in the course development team, the professional hierarchy was further flattened by the reality that my formal educational qualifications were lower than those of 'academic' team colleagues. My academic status hence made me a co-
learner, and indeed I was encouraged by the team to use the work for research purposes. There remained, nevertheless, the potential for power relations to influence data. From the students' viewpoint, however, it is possible that my involvement in the team demonstrated the seriousness of our task and enhanced co-operation from students. The whole learner-centred environment with its relatively democratic approaches and egalitarian relationships, notwithstanding, went some way towards limiting data distortion related to my position.

Fifth, power issues were further limited by my researcher role as I could do a great deal more listening than talking in the course development and post-class evaluation sessions (as testified in the notes). It was a genuine learning opportunity for me and the team meeting notes record spontaneous and genuine, heart-felt expressions of opinions and perspectives of staff members. Indeed they show that debates about the one major difference amongst us (relating to interpretation about how to use our course structure and what was meant by 'learner-centred') were primarily between the 'outsider' curriculum specialist and the facilitator. Difficulties relating to the facilitator's enormous influence over the course are elaborated in Chapter Five. The educational philosopher tended to be more tolerant of 'positive chaos' and supportive of the facilitator's approach than the curriculum specialist and I generally maintained a position of chair (though I instinctively trusted that the facilitator would finally achieve the learning outcomes in his own way).

This raises the problem, common to all forms of participative research, however, of mixed motives. At times I was operating as more of a practitioner than a researcher and at other times it was reversed. Indeed the task at hand sometimes demanded me to be more the one than the other, when I might have chosen to take on more of the other role. For instance in interview sessions, it was not always possible to pursue the issues as far as I would have liked, in following my practitioner interests.
In any event there was no indication in the team meeting notes that my professional position impacted negatively, for instance, on the quality of data forthcoming from students in my interview sessions relative to those from others'. Similarly it did not prevent open reflexive deliberations amongst the course team. (The nature of the debates had no impact for instance on job remuneration and there was no evidence of concerns, even subconscious, about job security. If the facilitator had felt it necessary to change his stance this could have been a factor to consider in interpreting the data).

Sixth, regarding barriers to students' communication, we acknowledged the cultural tradition of respecting authority without question, and the potential this held for distorting data. We thus worked to limit the negative impacts of this reality on the study in ways available only to 'insiders'. The practice itself depended on students' personal empowerment and criticality. It therefore focused on promoting a 'safe' liminal experience as a 'rite of passage' (van Gennep, 1960), a subject of reflection in Part Three, through which students could develop the confidence, knowledge and capabilities required in the 'mainstream' University and later at work. To this end we strove to promote a relaxed, friendly, nurturing, democratic and egalitarian environment where students and staff addressed one another by first names and staff made themselves freely accessible through open-door policies. Because of its 'insider' status the study itself was located in this environment.

The study was, in fact, able to enhance the programme's ethos through demonstrating critically reflective processes. Democratic, open-agenda 'house-keeping' and interview sessions, for instance, gave opportunities to welcome and jointly interrogate feedback both positive and negative. We could reward these processes, furthermore, by adjusting the practice according to student suggestions wherever feasible, or explaining when applicable, where and why this was not possible and how it could be accommodated in the future.
Data Collection, Organisation, Analysis and Reporting

What follows is a discussion of some principles underlying the data gathering procedures and the data's organisation before an explication of the procedures, revealing how they were conducted and why; what type of data were collected and why, and how data were analysed and reported.

Data Collection and Organisation

The following data-gathering procedures\(^7\) are discussed below after establishing some underlying principles and how the data were organised:

- Observations and deliberations of the course developers.
- 'House-keeping' sessions.
- Informal and spontaneous discussions and interviews.
- Mid-course and end of year formal group interviews – pre-arranged and semi-structured (Appendix 5).
- Post-course questionnaire survey (Appendix 6).
- End of year student questionnaire (Appendix 7).
- Student case reviews (Appendix 8).
- Assessment procedures within the course.
- Observations of 12 mentor students early the following year.
- A semi-structured feedback session with the 1997 group as third year students in 1999.
- Examination results in 'mainstream' courses for four undergraduate years.

\(^7\) The intensive data-gathering process, involving a high concentration of attention on both teacher and learners, must have influenced their behaviour. However, subsequent experience indicates strongly that good grades continued without this thoroughness of team data-gathering, analysis and organisation. Although the course facilitator continued to evaluate the practice through 'house-keeping' sessions, group interviews, post-course questionnaire surveys, case reviews, and assessment, the level of detail, analysis and recording was not retained. Similarly, colleagues only participated in 'house-keeping' sessions as they wished and helped with group interviews at the request of the facilitator. At the same time, I continued to gather quantitative data on the comparative performance of all our students across all courses. Chapter Seven will reveal that, after the level of intensive
Underlying principles

Like Parlett and Hamilton’s (1977:13-14) adaptable and eclectic “illuminative evaluation” the study took as given the complex situation and made no attempt to “manipulate, control or eliminate situational variables”. Indeed following MacDonald and Walker’s (1975:9) guidelines I aimed to develop insights into those variables to increase understanding of “variables, parameters and dynamics” of the study.

The ‘problem’ defined the procedures, chosen for their potential to explore specific questions, and in what combination they should be applied, depending on emerging data and their need for cross-checking. Through exploring the relationship between statistical analyses of examination results and the practice, I sought to address what Guba (1990:21) described as “imbalances” between rigour and relevance, precision and richness, elegance (of grand theories) and applicability, and discovery and verification. The diverse procedures offered “converging lines of inquiry” through triangulation processes (Yin, 1989:95).

Acknowledging that “truth is multiple in social situations (MacDonald and Walker (1975:9) naturalistic data were used to convey both students’ and staff’s range of perspectives. Furthermore responses were revisited when there were interpretation problems and students and staff had opportunities to set agendas to ensure the kinds of questions being asked were addressing issues they considered important and relevant. In accordance with this work’s values the data gathering procedures reflected ‘constructivist’ and ‘political’ interests, the course improvement purpose, the assumptions, values and interests underpinning it, the team’s personal involvement and the “hopes, values, and unresolved questions” relating to our social context (Popkewitz...
The study did not seek to be ‘neutral’ but to produce findings that would inform our practice.

Data organisation

Data were organised immediately after collection and preliminary cross-checking. Notes of team meetings, ‘housekeeping’ and interview sessions, and survey analyses (with workings from raw data) were filed chronologically and indexed. Thus it reflected what Stenhouse called a ‘case record’ of archival raw data (Burgess, 1985:12).

The file captured data from the first course development meeting in August 1996 to post-course meetings in 1998 maintaining what Yin (1989:100-2) called a “chain of evidence” for my conclusions. This enhanced “construct validity” in that it confronted me with evidence that I might have left out through carelessness or bias, reminding me of the circumstances and time at which the data were collected and the discussions around it at the time that naturally included value-laden debates. The file thus facilitated the emergence of theory from the data.

This provided an “audit trail” with “dependability” and “confirmability” checks (Guba and Lincoln, 1981, 1983, 1989) whereby observations and decisions were recorded and could later be checked. Shifts in focuses, differences amongst team-members and decisions for methodological changes could be tracked and accessed through the file. Data could be re-analysed and reconsidered in the context of new data. This helped ensure theory was grounded in data, or developed to explain them (Guba and Lincoln, 1983). Furthermore they were “confirmable” in that they and their interpretations were “rooted in contexts and persons apart from the evaluator and were not simply figments of the evaluator’s imagination” (Guba and Lincoln, 1989:243) and emerged through ongoing “member checks” (Guba and Lincoln, 1989:237).
Data-gathering procedures

These do not pretend to be rigorously researched but reflect a practitioner’s hasty attempt to gather data to promote understanding of both the course development process and the strengths and shortcomings of the course itself in relation to its aims and objectives. This reflects one of the problems of practitioner-research when, for instance, practitioners are fully involved in the practice and committed to specific tasks or responsibilities, and cannot prioritise time for the planning of their research over the practice itself.

Nevertheless, I strived to ‘check’ data continuously through the multiple data sources. They were used immediately where applicable, to inform improvements to the course, and kept for reference for a future course evaluation project where they would be used to explore qualitatively the relation between our practice and students’ mainstream course grades.

Observations and deliberations of the course developers

Notes of these meetings constituted the bulk of the raw data collected. In order to understand first-hand what occurred in the classroom and to then participate in post-session interpretive and evaluative discussions all three ‘academic’ team-members observed classroom sessions. We believed the benefits of observing directly the classroom activities would outweigh the disadvantages of intrusion and that having multiple observers would limit distortions, increase reliability of our ‘evidence’ and enrich the interpretations we could subsequently make on our observations.

Through a constant rather than sporadic presence we sought to become increasingly ‘part of the furniture’, disrupting classroom goings-on as little as possible. We thereby aimed to minimise distortions relating to isolated visits. In fact the notes record interactions and student behaviour indicating we had reached “extinction time” (Wickham, 2001). In terms of our presence inducing artificial behaviour, the students demonstrated relaxed behaviour, including
"sloppy body language" and noisy interactions (team meeting notes, 5 March 1997).

The course facilitator was naturally more aware of our presence and interests, but said our presence did not negatively affect him or the students. His view was reinforced in that it did not emerge as a problem in discussions, interviews and questionnaires. On the contrary, it seemed likely that the Hawthorne effect came into play, enhancing the performance of both students and facilitator, as emerges for discussion in the case study of part Two.

The meetings were held most intensively in the first semester of 1997, during the course's implementation, for one to two hours twice a week. The purpose of these meetings was to:

- discuss each session, to assess its effectiveness in terms of aims, content material and the teaching and learning processes;
- feed back new knowledge emerging from these discussions into the course development / evaluation processes;
- plan specifics of the next session;
- give the facilitator opportunities to express his immediate perceptions, concerns and personal assessment of how and where he felt the session 'worked' or 'failed', drawing on past experience where applicable, to suggest possible ways forward for following sessions and future years;
- report and reflect on any spontaneous, informal feedback received;
- consider how effectively data were being gathered, and whether additional data were needed for the evaluation;
- consider optimum timing of, and questions for, other data-gathering procedures.

Having a panel of observers with various inputs as discussed above enriched these deliberations in terms of checking perceptions of observations, debating emerging issues, informing subsequent developments and alerting us to areas for future focus. We could also agree to work co-operatively to focus on
different aspects of a session. Open-ended, unrushed, semi-formal in nature, the notes captured a wealth of data on our deliberations.

The administrative manager sometimes used an audio tape recorder, and sometimes her own jottings to produce written records of meetings. These were circulated for comment by the ‘team’ and adjusted if necessary, to reflect as accurately as possible what team members thought they had heard or said and what plan of action had been agreed upon. Approved documentation was then filed. Through joint critical reflection we tried to understand how, why and where learning took place or did not, and what circumstances appeared to promote learning for which students, and to inform further course developments.

Sharing radical constructivist interests we valued and encouraged different perspectives, for their contribution to our ‘accurate’ interpretation of the experience. Doll’s (1990:41-45) description of post-modern approaches to making meaning of a situation, resonated with our team’s capacity and tolerance for disequilibrium, uncertainty, complexity and ambiguity in the course development / evaluation processes. The notes show how we ‘took risks’, exploring new, incomplete and tentative ideas, intuitive responses and feelings, knowing colleagues would help develop them, mirroring the approach we promoted in the classroom.

While there were continuous disagreements on course ‘structure’ issues the team meeting notes record a continued spirit of openness, co-operation and mutual respect that allowed us to agree to disagree and continue our work. They reveal our active participation as ‘co-learners’ jointly involved in constructing knowledge. They also demonstrate my role of “fourth generation evaluator” (Guba and Lincoln, 1989:261), not only through this participation, but also through my role as ‘chair’ in “assisting the emergent reconstructions to see the light of day” in a “spirit of shared mutual responsibility”. The notion of evaluator as co-learner is supported by a number of theorists including Weiss, J (1989) and Grundy (1987).

Habermas’ criteria were used to for judge the quality of our deliberations. These were set out by Grundy (1987:129) as “comprehensibility of utterances within the group; the truth of the propositional components of the group’s discourse; the authenticity of the speaking subjects and the correctness and appropriateness of actions in which the group engages”. Part Two gives a sense of how these principles underpinned our work. A critical edge was added to our ‘interpretive’ meaning making through what Grundy (1987:131-2) called “authentic critique”. Our deliberations involved critically examining the value of theory for practice and seeking theory which authentically related to our specific “social milieu of the teaching / learning situation”. This reflected our interest in an open, dialogical relationship as well as a holistic, relevant learning environment with a dialogical relationship with students.

Our aim to be equal participants and co-learners in the course development / evaluation processes naturally raised issues of power. As ‘chair’ I could facilitate rather than dominate discussion, reflecting the leadership style to which colleagues were accustomed. The strength in this was that disagreement did not prevent perseverance in a co-operative, cheerful and enthusiastic spirit or diminish mutual respect and liking for one another. A weakness was that I did little to intervene when some team-members felt frustrated by the facilitator’s influence and power to ignore team decisions once in the classroom. The notes reveal the ‘outsider’ curriculum specialist
made regular and increasingly forthright mention of this frustration. However they also reflect her continued good humour and the high esteem in which her views and suggestions were held by all team-members for her experience, intellect, insights, stamina, humour and her capacity for critical reflection. Indeed they show she admirably fulfilled the ‘disinterested peer’ (Guba and Lincoln, 1989) role, being most objective and able to step back to reflect on the process and to make useful connections between theory and practice.

Despite the above concerns, the notes reflect shared enthusiasm and excitement about the quality of learning observed in the classroom. For this we were almost totally dependent on the facilitator as we were for the warm, cheerful and democratic atmosphere that pervaded his classes. He knew the students best and developed an excellent rapport with them and we relied on him to integrate an appropriate ‘Africanness’ into the course and to express our shared passion for the broad philosophic underpinnings of the course through its implementation.

The radical constructivist philosophy enabled ongoing critical reflection and iterative meaning-making processes to continue through our differences. The regular meetings enabled us to “loop thoughts back on themselves” and to ‘step back’ from what we ‘knew’, based as they were on principles of “critical praxis” (Grundy, 1987:115), of participatory democracy and a caring ethic (Henderson and Hawthorne, 1995). Just as these processes helped develop the PBL practice, so did these deliberations provide rich, nuanced, cross-checked data, against which other data could also be checked, thus forming an essential element of this study.

‘House-keeping’ sessions

The time-tabled weekly ‘house-keeping’ session lasting forty-five minutes, provided a democratic forum for students and staff to discuss openly any concerns – another means of maximising the inclusion of all participants to reflect on their experiences and to decide what topics to discuss (Tripp, 1998).
These sessions were attended by at least three of us, including the facilitator, issues were recorded and where applicable fed into other group deliberations.

Everyone was invited to place items for discussion on the agenda. We could use this forum to check our interpretations of student surveys or of what we had 'seen' or 'felt' in or outside class, and probe for student opinion to confirm or challenge them. Also, from these discussions issues or questions arose that needed further exploration through interviews or surveys. Both students and staff were encouraged to demonstrate reflexive, undefensive behaviour in these sessions. In this way we worked to minimise our 'power' as staff and to demonstrate that we welcomed negative feedback and different perspectives for what we could learn from them. This helped limit students' cultural inclination not to question authority, providing an opportunity to 'model' self-reflective processes and tolerance if not celebration of difference – the behaviour we wanted them to demonstrate in the classroom.

It linked also to our interest in social justice demonstrating our aim to serve students' interests and 'share power', jointly analysing the experience and sharing information, adjusting course plans in response to worthy student opinions. This promoted course ownership, investment in learning processes and outcomes, open dialogue, empowering both staff and students and adding authenticity to the study (Aoki, 1991; Guba and Lincoln, 1989; Henderson and Hawthorne, 1995; Marsh, 1997 following Boomer and Green; Tripp, 1998; Walker, 1983).

Beyond benefiting from their own inputs students developed skills in negotiation and critical reflection. Students responded positively to these opportunities, saying they felt empowered by these processes and appreciated being treated as adults. In response they offered mature and useful, often surprising insights into the course, reflecting a degree of commitment to course development processes that went far beyond my expectations. Thus 'housekeeping' sessions contributed to students' development and to course development and evaluation processes.
Informal and spontaneous discussions and interviews

Many students took advantage of our open door policy and dropped into our offices or chatted elsewhere on the campus. Conversations ranged from the light and casual to the serious, including personal and financial problems, academic issues and thoughts (negative and positive) relating to the course. Where relevant these fed into course deliberation meetings without breaking confidentiality, also from 'non-team' staff (probably considered more 'neutral' than we were).

We took advantage of informal opportunities to learn about students' specific course and broader academic (and personal or social) experiences. These conversations occurred most frequently in the first semester of 1997 but continued into the second and beyond. Relevant data (new, confirming or challenging) were shared, only with permission, at our meetings and documented, providing another opportunity to incorporate new perspectives in our deliberations.

Data gleaned in this way were checked against the views of other students in 'house-keeping' sessions or investigated further through more formal data-gathering procedures where their quality could be checked, contributing again to reflexive processes. A strength of these conversations was in their spontaneity and informality and the different kind of perspectives that could emerge. Shyer students or students expressing a 'minority' view were sometimes more comfortable communicating in this way.

Formal group interviews - pre-arranged and semi-structured

The purpose of these group interviews was to provide a different opportunity for learning about student perspectives on their experience, producing new data to be pursued and cross-checking existing data for confirmability or discrepancy. Five of the seven questions related directly to the course (see
Appendix 5), while two focused on broad issues relating to students’ whole university experience, social and academic.

The questions were negotiated with the team and refined with their input. We agreed that the questions should be used as a guide to discussions, and as time would be limited, students should have the power to influence the interview focus according to their interests or concerns. This approach meant acknowledging and welcoming the different slants interviewers would impose on interviews, according to their subjective and academic interests. It was agreed nevertheless that interviews would all follow the format of starting with reminding students of the course objectives, explaining their purpose and encouraging students to express different perspectives, positive and negative. Guiding questions would be read out, time constraints would be emphasised and students would be invited to concentrate discussions on whichever interested them most, and to skim over the less relevant. We thereby sought to create a relaxed atmosphere, demonstrate a desire to learn from the interview, and promote a sense of ease that would enhance openness and trust in the discussions. All students would be encouraged to make some input, even if it was only to agree or disagree with others.

Individual interviews were logistically difficult and there were other opportunities to meet students individually, thus group interviews were used to offer a different data-gathering opportunity. Students chose their interview groups (of about eight) and their interviewer, enhancing ease, the likelihood of grouping according to certain shared views, capacities to express counter views or views they perceived as challenging our authority or disappointing to us. Through the group situation we sought also to promote discussion and critical reflection and therefore data quality.

It was therefore decided that two sets of 20-minute interviews would be conducted by three team-members. One positive outcome was that we collected useful data without imposing on students’ ‘free’ time. We used a ‘house-keeping’ session and students appeared to enjoy this different opportunity to reflect on experiences and discuss perspectives with
interviewers. A negative aspect was that the sessions were too rushed to explore all the conversations that emerged from the questions.

The first set of interviews were held mid-course to ensure students had had time to understand the course aims, grow used to the methodology and form opinions on strengths and weaknesses compared with 'mainstream' courses. Also, there was still time for feedback to influence the course, or to be checked through other data-gathering procedures.

Interviewers agreed that the short interviews were a mistake. Nevertheless, it encouraged students to focus on questions of their choice and ensured discussions were similarly spontaneous and uninfluenced by others (apart from one group discussed below). It gave an opportunity for students to qualify, extend or disagree with ideas expressed, and to ‘spark’ ideas amongst them, and for interviewers to observe students talking across them.

The first three groups were interviewed simultaneously, with two following immediately. One interviewer handled the time shortage differently, allowing the first group to go overtime, having a short meeting to discuss the questions with the second group and requiring from them a written response the next day. Thus responses were received one way or another from all forty-nine students.

A strength in these interview sessions was having “multiple investigators” (Yin, 1989:66), ensuring our biases and personal potentials to intimidate or silence discussions on different topics were spread. Immediately after the interviews, we compared notes (literally and figuratively) and found common threads with some rich variety, reflecting the different group dynamics, interests and focuses.

The administrative manager documented our deliberations and analyses of interview discussions and we checked these for accuracy. In this process we lost some of the vividness of speech and therefore the full record (Stenhouse, 1982:218) of what was said. A tape recording would have assisted here ensuring we did not (consciously or unconsciously) edit data in line with our
own interests. On the other hand using a tape recorder could have impacted negatively by intimidating students and affecting data quality. Though there was potential for violating data, it was 'checked' when we gave students feedback on our agreed analysis of interview data in a subsequent 'housekeeping' session. In any event I detected no signs of conscious editing or 'strategic' rather than open discussion at the meeting for sharing and noting data (though I could have been unconsciously a culprit myself).

The team agreed that the group situation provided deeper insight into students' experiences than would generally have been possible in individual interviews. It avoided situations experienced in individual interviews, of interviewers spending a disproportionate amount of time giving their ideas in order to elicit a response, with their potential for corrupting data. Despite problems we decided the advantages of group interviews over individual ones outweighed the disadvantages. The second set of interviews were thus similarly conducted in groups in order to explore students' retrospective thoughts about the course experience and its impact on their development.

**Post-course and end-of-year questionnaires and student case reviews**

The anonymous post-course questionnaire of June 1997 (*Appendix 6*) was designed to quantify on the one hand the number of students who responded in particular ways to closed questions about the course in relation to its aims and objectives. On the other hand it elicited explanations to their answers and responses to open questions about the course objectives. Thus the questionnaire provided data on what individuals thought and why, enabling me to cross-check data gathered elsewhere and to explore issues that had arisen through previous procedures. For instance we could establish how many students, by the end of the course, were disturbed still by cases having no 'right' answer, as raised earlier, and why, and whether their assessment of individual cases supported the data in the questionnaires. Thus individual insights and perspectives were recorded in students' original language.
Because of our good relationship with students, I dared ask many questions trusting they would take the trouble to answer them all. While some of the questions were fairly clumsy (and we have since refined our questionnaires), I found both the qualitative and quantitative aspects of the data informative, leading to further checking and exploration in ‘house-keeping’ sessions of the second semester and the second end-of-year questionnaire of October 1997 (Appendix 7). The questionnaires gave a voice to quieter students who may have been inadequately heard in group situations.

The questionnaires began with a request for careful thought emphasising our course development purpose, reinforced verbally by the facilitator and me explaining our need for honest and critical feedback and students’ role in impacting on developments that would benefit future students (appealing to their sense of ‘ubuntu’). We were there to explain questions as necessary and indeed many students did not understand the word ‘camaraderie’.

The June questionnaire was implemented in class time during the last session of the semester to explore students’ immediate impressions of the completed course. Forty-six of the forty-nine students responded. The students generally took their time filling in the questionnaires and afterwards all enjoyed a piece of cake (a tradition ever since) as a token of thanks for their generous participation in the various data-gathering procedures and to wish them well in their examinations! While concerned about problems of eliciting honest critical feedback, the team felt relatively confident that by this stage, students understood that we regarded all data as important. They had experienced our genuine responses, actions and negotiations arising from any ‘negative’ or challenging feedback and we judged they would not interpret the token ‘thank you’ as encouragement for positive responses.

Then towards the end of the academic year there was a second (October) questionnaire (Appendix 7), asking questions that had arisen during the second semester. Through it I aimed to learn what students thought of the first semester course in the context of having experienced a full academic year and our not-for-credit modules, to see if and how perspectives had
changed. Students gave comparative comments on the value, strengths and weaknesses of all modules. It included a question about one student’s fundamentally challenging comment in ‘house-keeping’, that his academic success was more a product of the programme’s wide curriculum than the course itself – raising a question we had repeatedly asked ourselves. Through the October questionnaire we could re-visit the issue, and elicit individual views on it.

The facilitator perused raw data from both questionnaires and agreed that the final analysis was fair and accurate. The administrative manager extracted quantifiable answers to the closed questions and grouped similar qualitative answers to open questions, capturing much of the original wording. She then listed responses that fell outside ‘groups’ of answers, capturing the data’s richness.

Based on this work, I wrote a consolidated report and summary, revealing the way I analysed and interpreted the data. These were distributed to the team for comment, discussion and adjustment. Raw data and the administrative manager’s organisation of them as the first step in their collation were available for perusal. The team met to discuss my analysis in relation to the raw data and what it told us about student perceptions of the course, thereby checking and approving the analysis.

**Student assessment**

Regular case-related tasks, written and oral, two tests, a research project and a formal presentation of it by a group representative formed the basis of the students’ assessment (*Appendix 9*). It involved continual, formative assessment, but marks were weighted towards the end of the course so that the final test and research project counted the most. This reflected our view that early assessments were primarily learning opportunities that would help students develop skills on which they would finally be assessed. The various tests and assignments were designed to assess the extent to which students
achieved the learning outcomes of the course. Although marks were duly awarded by the course facilitator, I decided (for reasons given below) not to use them in the study.

We were fortunate to have a well-respected critical theorist agree to act as ‘external examiner’. He commended us on “what appear(ed) to be a highly innovative curriculum and an assessment design which, in terms of intent, (met) with best practice standards for assessment in higher education”. In his opinion the “assessment design was particularly strong” in view of its diverse assessment contexts which he said represented “a global shift towards authenticity (gaining clearer measures of what students actually know)”, and its “equity (providing more opportunities to perform well in different contexts)” (Jansen, 1997).

However, he pointed out deficiencies in the assessment implementation advising that all marks be reduced by 10%. He attributed them to inconsistencies, disorganisation and limited attention to detail. He pointed to problems in co-ordinating assessment variables, in the criteria being “unclear and trivial”, lacking “clearly associated indicators”, the assessment procedures being complicated and unsystematic, and the scores being too uniform.

The course facilitator felt his work had been misunderstood. The external examiner agreed to meet with us to join the debate on the problems and to help us improve our assessment practice. He allowed us to tape-record the meeting and the transcript was filed in the database for reference and analysis. Discussion centred around assessment goals, the type of reasoning that needed to be applied to assessment designs and the difficulties in validating assessment of, and assigning marks to, some of our intended course outcomes.

We agreed the main value of the course assessment to have been in its formative nature with the facilitator’s well-considered advice and comments on individual pieces of work, that the assessment methods needed improvement and the marks were not very meaningful. Based on this I decided they were
not useful in indicating the extent to which students had achieved the course outcomes. I would rely on comparative grades from ‘mainstream’ (traditionally assessed) first-year courses for quantitative triangulation of data.

**Observations of student mentors**

Twelve 1997 students were selected as 1998 student mentors. During the mentor development workshop (30 January 1998) I was able to check my interpretation of the October questionnaire data with them. They were not group representatives but helped me explore some uncertainties. Their selection as mentors was based on a range of criteria like academic ability, communication and ‘people’ skills, interests and reasons for wanting to be mentors, gender and home language (to approximate the range of incoming students). The group could thus be characterised as academically able, confident, positive and thoughtful young people from a mix of ethnic backgrounds, with interests and capacities to help orientate new students.

I gave them each a written summary of the data and we discussed my interpretation of them and the administrative manager’s basic grouping of comments. The mentor group showed every sign of being relaxed, confident and at ease with one another and with staff, and interested in the changes in the course planned for the students they would be mentoring. The discussions were even-handed incorporating both positive and negative comments about the course. Based on the points of debate and agreement that arose during this discussion, I judged their input to reflect well-considered, honest views that would contribute usefully to the study.

**Quantitative data – students’ examination results in ‘mainstream’ courses**

Our students’ grades in the three (or in a few cases four) other courses were statistically analysed and compared with those of other students in terms of mark distribution, pass rates, average marks, and group size for each course.
A comparison was made also between the results achieved by our students and others with the same matriculation points (Appendices 42 – 46). Statistical analyses of all courses were undertaken for this group as they progressed through their studies over the three subsequent years (up to 2000) by which time they were expected to have graduated. The administrative manager worked in conjunction with the University Data and Statistics department to produce the comparative analyses, which she presented in graphical form. It is against these data and their subsequent chi-squared analysis that I explore qualitatively their relationship with the course, as clearly there were numerous variables contributing to students' grades.

**A semi-structured feedback session two years later**

On 13 August 1999 the 1997 students, in their third year of study were invited to a meeting with staff, over a hot lunch provided to encourage their attendance and to thank the group for their essential role in the data gathering processes. Thirty-four of the original forty-nine attended (about 69%) offering retrospective views on the course’s impact on them, suggestions on what they thought it had lacked and what it could have done better. The administrative manager took notes of these discussions and the team contributed to their adjustment to reflect what we all agreed we had heard.

**Data Analysis**

Reflecting Stenhouse’s advice (1982:218) the data file, which formed the basis of my analysis, comprised a chronologically arranged, indexed narrative of discussions and debates recorded in their complexities, with no attempt to “simplify or attenuate” them, were approved by the team and was managed and kept by the administrative manager.

Analysing the data was a long and messy process of immersion in the documentation. I searched for categories of data, separating them into
groupings of related data and using a card system. Finally, with a thick pile of cards representing categorised, page- and cross-referenced data I started to group together the categories that seemed to relate to one another. After many hours of pondering and soul searching, I found I had grouped the categories under themes or headings that reflected course aims and objectives and therefore the first spiral of research questions.

This led to my questioning, at the time, whether I had been naïve and should have saved time and seemingly endless hours of reflection by sorting data according to these objectives in the first place. It was very satisfying, however, to allow the framework to emerge in this way, confirming the 'honesty' of the approach and denying potential doubts about having unconsciously manipulated data to 'fit' the questions. Indeed it was also more accurate because it ensured that I did not miss other points in the data that I might have missed if I had worked from the course aims and objectives. It also demonstrates that the research questions were relevant.

Having followed a circuitous route back to the beginning I proceeded to seek patterns in data that would confirm or question my 'pre-theories'. Data emerging from their raw state of documented deliberations were integrated with processed data like analyses of questionnaires and examination results. I noted themes and trends that emerged, making connections between different conversations in an attempt to understand how the course had affected students, where and how it could have been improved and why. While convergence of data from various sources corroborated evidence, divergence invoked their further gathering or exploration. The data hence formed the basis of a holistic case study (Stake, 1983).

In line with the philosophical approach, I reflected critically on the work and strove to be as "honest and ethically mature" (Smyth and Shacklock, 1998:7) as I could be in such decisions and choices, but do not claim my analysis to be unbiased. Habermas' criteria (Grundy, 1987), mentioned above, guided me in discerning from the data-gathering procedures and their notes, whether ideas were honest or strategic; whether 'truths' were accepted by the group, or
imposed by a team-member who perhaps had power over the group in a particular context; which ideas were 'natural' truths and which were ‘culturally derived meanings’.

Report-writing

The writing was in the form of a narrative to make it “simple and direct to read” and to include subtleties – representing interactions in their natural setting (Stenhouse, 1982:219). I thereby conveyed ambiguities inviting speculation on causal relationships and providing readers with a basis for interpreting the goings-on differently from the way I interpreted them. Drawing on the literature I focused on the strengths of in-depth case study research to produce informative and useful ‘findings’ (Eisner, 1990; Guba, 1990; Henderson and Hawthorne, 1995; Stake, 1983; Stufflebeam, 1983; Kemmis and McTaggart in Marsh, 1997; MacDonald and Walker, 1975; Parlett and Hamilton, 1977). Aware that it was a contextualised (and partial) account I aimed to provide in-depth data that would help readers relate the work to their own situations, experiences, interests and priorities (MacDonald and Walker, 1975). Following Eisner (1990) the report did not contain prescriptive findings but aimed to enhance the quality of readers’ deliberations.

It included unedited “expressed reactions” to enhance reliability (MacDonald and Walker, 1975:9) locating me as “a situated, subjective observer” rather than an authoritative author (Smyth and Shacklock, 1998:7), balancing scepticism born of critical reflection with sharing “emerging insights”. It thereby acknowledged that interesting and useful observations could not always be validated, and shared “the burden of being skeptical” (Stake, 1983:263).

To avoid writing over the students’ voices by theorising the findings or presenting my own logic in the form of an analytical study, the report sought to distinguish between data and their interpretation and to be guided by the “demands of the story” (Stenhouse, 1982:219). Instead it portrayed what
Guba and Lincoln (1989) called “thick description” and Henderson and Hawthorne (1995) “a comprehensive curriculum portrait” specific to the practice and its context, including a narrative of pitfalls experienced, and my perspective on why they occurred and how they could be avoided. Details were incorporated to avoid losing, diluting or permanently consigning data to the files (MacDonald and Walker, 1975).

Foregrounding interactions amongst participants and portraying the kind of behind-the scene activities that are generally cleansed from evaluation reports (Smyth and Shacklock, 1998:5) enhanced the data’s richness. It also reflected the study’s interest in enabling readers to judge the quality of the data-gathering environment and the basis on which I came to my conclusions.

Conclusion

This chapter has demonstrated that the purpose of this evaluative case study was to explore the impact of the course on our students’ learning, to inform future developments and decisions. There was no attempt to present any objective, scientific ‘truth’ or proof or any rationalistic simplification of reality, to ‘edit out’ complexities and arrive at neat conclusions. It has, however, produced knowledge that is useful, revealing and intelligible to remaining team members and new staff, in terms of issues and concerns facing us. While it was not a representative study in any way, it provided a rich picture of our deliberations as we sought to learn, from the experience, about the kind of learning conditions which we believed would enhance students’ learning.
Through data-gathering procedures data were iteratively checked and explored to limit the shortcomings associated with case study and 'insider' research. Their quality was enhanced by the following factors:

- a talented, knowledgeable and experienced group of course developers committed to improving our practice, sharing a passion for transformative education and a mutual liking and respect for one another;
- relaxed, friendly relations between staff and students reflecting the egalitarian, democratic approach to teaching and learning elaborated in Chapter Four;
- strong rapport and friendliness between facilitator and students.
- a variety of contexts and forums for data collection providing opportunities for cross-checking of data;
- the different stages in students' experience at which data were gathered, increasing the range of perspectives and helping me cross-check data;
- the students' positive attitude towards helping to improve the course for future students;
- staff's demonstration of reflexivity and knowledge construction as role models for critically reflective relations to knowledge.

These factors helped limit four main potential limitations. First was the reality of people tending (particularly in our context) to want to please those in authority (Jansen, 1997c). Based on the kind of feedback we received, we unanimously agreed students had demonstrated a willingness to give honest and well-considered responses and to give challenging feedback.

Second, data 'ownership' problems were limited by cross-checking interpretation and equal access to the file. Third, my subjectivity was limited by multiple sources of data, from the team and students, and consistency was checked over students' years of study.
Fourth, my interests were made explicit to make my biases obvious and the study was guided by Aoki's (1991:75) guiding socially critical questions to provide coherence with the practice. They concerned questions about whose interests were being served; what perspectives and world view underlay both practice and case study; what view of the student was embedded in the course and the data gathering procedures; what assumptions underlay educational and data-gathering approaches; and what bias was revealed through the work. These concerns reflected what Freire called praxis and what Aoki (1991:75) called the "dialectical framework of practical action and critical reflection". They helped ensure that the values underpinning data-gathering procedures were coherent with values underpinning the practice itself.

The study's radical constructivist framework also helped me make sense of the data and to counter the lack of rigour, and potential for abuse, associated with qualitative research. It foregrounded questions of subjectivity, bias and partiality (from selection of research questions to selection, interpretation and presentation of data) to limit these shortcomings (Crossley and Vulliamy, 1984; MacDonald and Walker, 1975). The work was guided inter alia by Stufflebeam's (1981) Joint Standards for Evaluation of Education Programmes, Projects and Materials; Guba and Lincoln's criteria of rigour or trustworthiness within a naturalistic paradigm (1981, 1983); their fourth generation criteria (Guba and Lincoln, 1989); Catherine Marshall's (1990:188-201) "goodness criteria"; Yin's (1989) evaluation principles; Habermas' criteria presented above by Grundy (1987:129) and Aoki's (1991) evaluation concerns associated with the different forms of knowledge.

Based on the above I argue that the study generally met the challenges associated with "trustworthy" qualitative (and critical) human science research. The data are available to team-members for further use and have informed ongoing developments of the course. The study could potentially inform practitioners of its broad context and theoretical interests in relation to PBL literature to help them discern in the findings what makes sense and is transferable to their own contexts. Case study readers could thus feel
adequately informed to judge the trustworthiness of the ‘findings’, whether they have gained significant insights into teaching and learning within our context, and to what extent these are relevant to their own contexts.

There are therefore grounds to argue that the strengths outweigh the limitations of this ‘insider’ case study and the potential shortcomings were limited by cross-checking data-gathering and interpreting processes, by the philosophical coherence between practice and research and their location in a learner-centred, democratic, egalitarian environment. The strengths that enhanced ‘reliability’ and ‘trustworthiness’ related to the study’s purpose, the diversity of the team, our shared educational philosophy and our shared interest in responding to the broad South African context, to develop the best curriculum we could.

In this chapter we have considered the methodological issues of the case study. Through this discussion I have sought to explain and justify the research method, and thereby add weight to the case study conclusions that learning opportunities could be improved for our students and could affect outcomes. Having explored the method, we are now in a position to look at the way that the course was planned, implemented and evaluated and this is the content of the following three chapters.
CHAPTER FOUR

COURSE PLANS AND DEVELOPMENT

Having discussed the methodological issues of case study research we are now going to focus on the course itself, in order to understand clearly the curriculum we are considering in terms of the research questions. We will do so over three chapters, starting here by looking at how the course was planned and developed in order to meet the learners' needs. For this purpose the chapter is divided into four sections, which are:

- the course aims and objectives;
- the three course aspects;
- the course plans – a holistic view;
- the curriculum – content, process and assessment.

This chapter thus clarifies the learner-centred, holistic nature of the learning opportunities that were planned, explaining the use of both content and process in the aim to promote students' growth in three areas, conceptualised as: academic, personal and intellectual. We will consider these plans in relation to the socio-political and cultural history discussed in Chapter One, and in the light of understandings that the built-in formative evaluations discussed in Chapter Three provided ongoing feedback that enhanced critical reflection on our practice. We will see how practical scenarios or cases were used as vehicles for PBL, as the team understood the concept at the time, in terms of the following working definition of PBL which reflected the course purpose, the need for curriculum innovation and the learners' needs. It also flags the problems we will consider in Chapter Seven in terms of the inadequate theoretical framework the PBL literature provided for the curriculum.
PBL was conceptualised as:

learning that results from applying prior / current knowledge and experience to compelling social issues raised through realistic business-related situations. It involves interactively constructing new knowledge and interrogating personal values and perspectives in the process of addressing problems within that situation. This involves problematising commonly held or accepted understandings implicit in the situation to enhance independent thought, deep understanding, elaborated knowledge, interest in issues of social justice and tolerance of difference.

The course plans are presented first in terms of course aims and objectives. These are then located theoretically in terms of our interest in developing a curriculum promoting our ‘adult and lifelong learning’, ‘political’ and ‘learner-centred’ interests. (‘Curriculum’ is used in its broad sense as discussed on page 86). In Grundy’s (1987) praxis terms, as defined on page 119, this iterative course development process represented an ongoing critique of plans and practice in relation to theory. It involved judging theory’s value for practice and at the same time allowing theory, authentically relevant to our teaching and learning situation, to emerge from it. (The evaluation process, conceptualised as part of the ongoing, ‘double loop’ (Schön, 1987) reflective course development process is discussed in Chapter Three).

Drawing on my concurrent academic focus on curriculum and the documented conversations during the course planning and development phases I conceptualised these aims and objectives, in curriculum terms that formed the basis of this analytical description. After discussing the three aspects of the course, this chapter proceeds to a holistic course plan illustrated through a model to demonstrate the interdependence of the three ‘legs’ to the cooking pot in achieving the course aims and objectives. It thereafter discusses plans in relation to course content and method, selected to provide the proposed curriculum experience using PBL through hypothetical, realistic, topical scenarios as the organising framework.
The selection of this methodology is a subject for reflection in Chapter Eight, in view of our need to push the boundaries of both OBE and PBL to make them fit our purpose. The disjuncture between our application of PBL and that in the literature is discussed in Chapter Three. The contradiction between the course ideology and its official representation in OBE terms, raised on page 63, becomes obvious in this chapter in relation to the course description of Appendix 4 that represents an attempt to fit our course into the NQF, using OBE terminology. (The question mark in the title demonstrates uncertainty, at the time, about how this could be done). The fundamental ideological contradiction, and the haste in which the course was planned and developed, as set out in the table on page 99, has resulted in some inconsistency in the documents produced at the time.

The small shifts in emphasis between Appendix 4, and the 'outcomes' against which students were asked to evaluate the course in Appendices 6 and 7, for instance, indicate the 'learning and development by doing' nature of the planning and development process, and a limitation of this work. Similarly the criteria for student assessment, submitted for registration of the module in terms of OBE (Appendix 10) do not entirely reflect the course aims and objectives and curriculum and pedagogical conversations recorded in the team meeting notes (1997).

Course Aims and Objectives

The course was developed around the aims and objectives informed by our joint experience, student feedback from a similar course and our ideological interests, as discussed on page 87. The course objectives are thus organised under three interdependent course 'legs' or aims, isolated somewhat artificially for purposes of discussion and clarity and illustrated on page 164, in the Student Development Model. They relate to the three case study sub-questions that guide my exploration into the course's effectiveness as a tool
for developing effective, critically reflective students with 'intellectual' approaches to knowledge and learning, as set out on pages 18 and 98. The first aim reflects common interests amongst PBL practitioners as revealed in the literature overview of Chapter Seven. Underpinning this aim to empower our students as knowledgeable, competent learners with skills for academe and for 'life', and therefore ultimately for work were the following objectives:

- to develop self-directedness;
- to develop the required academic knowledge, skills and attitudes, including problem-solving and metacognition;
- to develop interpersonal and communication skills and skills in teamwork and communication.

The second aim, to promote criticality and engagement with issues of social justice and democracy, and thereby to enhance understanding as students and citizens, incorporated the objectives to help students to:

- construct 'personal', 'authentic', elaborated knowledge;
- understand the contestable nature of knowledge and the power / knowledge relationship;
- pose problems and examine assumptions underpinning knowledge;
- exercise their own judgements in reaching decisions incorporating personal values and social, ethical considerations.

The third aim, to provide a nurturing, learner-centred, relatively democratic and egalitarian experience to promote personal growth and empowerment incorporated the objectives to:

- help students develop a deep sense of self-worth;
- help students grow in assertiveness;
- enable students to share power through democratic, egalitarian processes and relationships.
The Three Course Aspects

To achieve these three aims, and to elaborate on the discussion in Chapter Two, the curriculum was conceptualised in terms of providing a relatively 'adult', 'learner-centred' and 'political' curriculum experience (Jarvis, 1985), in its attempt to promote students' academic, personal and intellectual growth. While the three focuses are in reality interdependent, as the three legs supporting a cooking pot over a fire, for purposes of clarity they are discussed separately below.

'Adult' and 'Lifelong Learning' Experience

Conceptualising the curriculum as one for 'adult' and 'lifelong' learners reflected UNESCO's interest in equipping each child to "seize learning opportunities throughout life, both to broaden her or his knowledge, skills and attitudes, and to adapt to a changing, complex and interdependent world" (Delors, 1996:85). We recognised lifelong learning as multidimensional, learning from daily experiences "punctuated by periods of intense effort to understand complex data and facts" (Delors, 1996:102) and planned to use this curriculum opportunity to promote students' self-reliance to equip them to deal with, and contribute to, our rapidly changing society.

Relating to our mainly seventeen to eighteen-year-old learners as adults meant promoting active participation and self-directedness with students taking responsibility for their own learning, and participating in interactive knowledge construction processes. We aimed thereby to promote tolerance for difference and the recognition that beliefs and prior knowledge could bear examination and adjustment (Faure, 1972:148) and that peers were valuable resources in collaborative knowledge constructing processes. The course
facilitator would similarly adopt the role of 'learning resource' rather than knowledge-provider.

Learners would relate as resources to one another and to the course facilitator both in their ability to construct knowledge, and in the prior practical knowledge and understandings they brought to the classroom. The concept of learning as part of their personal biographies would be promoted (Dominicé, 2000). There would be a dialogical relationship between teacher and learner, where power was more equally distributed than in the traditional 'childhood education', and the teacher was an authority rather than in authority. There would be an informal form of 'learning contract' that would be referred to, during the course, with staff and students required to 'workshop' and present their expectations in terms of responsibilities and course aims.

Through both choice of content and teaching and learning processes the teacher would, moreover, strive to inspire the kind of curiosity associated with lifelong learning (Jarvis, 1992a; 2001). Thus an 'adult' oriented curriculum sought to establish skills, attitudes and approaches, including an awareness of their own thinking and learning styles, to enhance students' critical awareness of their learning approaches and styles and to generally understand themselves as learners (Ryan, 1997). We thereby aimed to equip students for a lifetime of learning and truth seeking for their personal fulfilment.

Strategies like SWOT analyses (referred to in Appendix 11) were designed to help students develop critical attitudes to knowledge, placing a different emphasis on 'facts' from the schools' and also from some concurrent and future 'mainstream' university curricula. They would involve students' undertaking their own research as a matter of course, for the purpose of finding out what they needed to know to solve a 'problem'. For instance they would need to consult learning resources to understand, in order to apply to a practical situation, the theoretical solution to 'supply and demand', or perhaps
a definition or point of law. The knowledge would in this respect be a useful tool acquired for a purpose.

Associated with the self-directedness we aimed to promote were opportunities designed through the teaching methods listed below, to interactively construct knowledge, to develop research and writing skills, including summarising and synthesis. In the process of analysing situations, reaching decisions or addressing issues emerging through the scenarios, students would need to independently and collaboratively acquire knowledge (and reference it appropriately), apply it to the problem at hand, and clearly and logically present their thoughts in written and oral English. There was thus some emphasis on the skills our learners needed as effective learners that would impact also on their skills for 'life' and later for work.

'Political' Experience

The curriculum was considered ‘political’ insofar as it would seek to promote in our students, critical reflection on the nature of power and a consciousness of democratic virtues and social justice (Faure, 1972). Reflecting Faure's (1972:155) notion of inducing "systematic doubt", the environment would aim to promote an ethos where the value of existing knowledge was critiqued and the underlying assumptions making it apparently sacrosanct challenged. This included the values and interests underpinning knowledge they would meet in their lectures and textbooks (and in the University and life in general, and later in business and in society, but this goes beyond the scope of the case study).

Scenario analyses would involve critical examination of commonly held views and assumptions underpinning them and judgements on new knowledge (both value judgements and a probing of facts and theories (Hesketh and Ngubane, 1997). We thereby aimed to demonstrate the contestable nature of knowledge. Through interactive knowledge constructing processes we aimed to give students opportunities to recognise and resist the power of the
dominant culture to define what counts as valid knowledge (Jarvis, 1985) and what values and behaviours should be internalised. We aimed to help students develop deep level understandings and elaborated knowledge that was ‘authentic’ in that it was ‘believed’ and ‘owned’ (Grundy, 1987). To enable students to adopt a position that was true to themselves, we engaged them in processes of critically reflecting on ‘accepted’ knowledge, constructing and defending arguments, and drawing on different forms of knowledge. We aimed to reward this kind of thinking through continuous assessment tasks (Appendix 9).

Overlapping with the interest below in promoting self-worth and emotional well being, the curriculum would similarly promote critical reflection on social and cultural issues students could experience as disempowering. For instance, out of the scenarios could emerge debate about the irrationality of isolation and conflict in individualistic, competitive, antagonistic capitalist culture (Skinner, 1996) in the context of traditional African culture and ‘ubuntu’, raised on page 35. This could give opportunities to reflect, for instance, on the disappearing culture of interdependence and communal living in new urban lifestyles and the relatively ‘civilised’ nature of a society that has no need for ‘old age homes’ and orphanages. Debates could emerge about the difficulties in straddling two cultures.

They should promote critical reflection on complex, sensitive issues around, for instance, affirmative action policies and their political and socio-economic implications. (Their impact would be felt personally by the students, first as students with bursaries, when relatively very few were available for whites and Indians, and then as employees - though the latter falls outside the scope of this case study). Indeed through both content and process we aimed to promote a ‘critical community’ of students and staff (Grundy, 1987) that foregrounded also ethical decision-making and social justice in the context of the increasingly prevalent neo-liberal attitude towards individual advancement that flew in the face of African culture. We thereby aimed to provide
opportunities to explore issues of individual emancipation at the expense of group freedom.

Quoting McTaggart and Singh, Grundy (1987:124) argued that

> critical reflection involves more than knowledge of one’s values and understanding of one’s practice. It involves a dialectical criticism of one’s own values in a social and historical context in which the values of others are also crucial


Through challenging students to explore issues of socio-economic and political equity and justice in making problematic conceptual distortions and unjust values, and thereby enabling learners to recognise and expose what was oppressive and dominating in a situation, we sought to provide an emancipatory experience (Schubert, 1986). Furthermore, through promoting the will to learn rationally from one another, to contest knowledge and to understand and critique the social reality in which they found themselves, we aimed to develop the kind of ‘critical community’ proposed by Grundy (1987).

In these ways we aimed to provide an environment in which students could explore the connection between knowledge and power, and experience processes of curriculum negotiation, at least to some extent, and thereby challenge the traditional educational basis of power relationships (Grundy, 1987). Overlapping with our interest below in personally empowering students through a learner-centred experience, was our aim to enable students to experience the link between self-knowledge and personal growth, and speech and freedom (Grundy, 1987).
A Learner-centred, Democratic, Egalitarian Experience

Conceptualising the experience we sought to offer as a 'rite of passage' (Van Gennep, 1960) from the familiar to the unfamiliar, we recognised the fear experienced in facing a new freedom and sought to support our learners emotionally through the personal, social and educational transition.

Drawing on Beane (1994); Boud, Keogh and Walker (1985); Jarvis (1988, 1992a); and Knowles (1978) we related significant learning to free, uninhibited self expression and the role of both feelings and cognition in promoting it. To minimise the learner's "threat to the self" (Knowles, 1978:41) in moving from reproductive to reflective learning we focused on the 'affect' in the curriculum (Beane, 1994) to personally empower students with the kind of self-confidence associated with strong self-concepts and emotional wellbeing. We aimed thereby to help students adapt to their new social and educational environment, to develop the confidence to explore new ways of thinking and relating to knowledge, and to help them make the unnerving transition from teacher-dependence to learner autonomy.

This third curriculum aspect thus aimed to promote personal growth through a nurturing, safe, personally empowering environment of democratic processes, egalitarian relationships and an ethos of honesty, trust, openness and tolerance, discussed in Chapter Two in relation to our learners' context and needs. Supporting this focus was: Faure's (1972:120) claim that a "permissive and self-directive atmosphere produced "the best results for development"; Knowles' argument (1978:79-80, drawing on Dewey) that "democratic social arrangements promote a better quality of human experience"; the contention of Brown (2002) and Jarvis (1992a) that learning is enhanced when situations are freed from bureaucracies.

First, we planned space and opportunity for negotiation (through time-tabled 'housekeeping' sessions, evaluation questionnaires and interviews, for example, as discussed in Chapter Three). Moreover, the course would offer
curriculum content and process choices to learners within the parameters of the broad-brush course design. Students would be able to influence, for example, which practical scenario they would investigate, through what processes and for how long, with the aim of providing a relatively democratic experience that was personally empowering.

Second, this would assume a dialogical relationship with staff who would act as advisers, co-learners in helping explore conflicting arguments rather than transmitting ‘truths’ (Faure, 1972:78). However, bearing in mind Freire’s (1994:21) warnings that both “authority” and “freedom” can be tyrannical and counter-productive to democratic processes, and a “permissive” climate “lacking in seriousness” needed to be balanced with a measure of authority (Freire, 1994:113) the course sought an effective balance between the two. Chapter Five reveals difficulties experienced in finding it.

Third and linking with the above ‘political’ aspect was our vision of promoting in our students a sense of self-worth through an environment that would promote critical reflection on the bases for any sense of racial inferiority ingrained in society (Delors, 1996; Jarvis, 1992a; Thembela, 1988/1989). At the same time it would enable students to experience personal growth and ‘success’ in inter alia, managing their studies and their lives, expressing and cultivating their individuality (Knowles, 1978, drawing on Dewey) and, we hoped, academically outperforming white students.

The course would be preceded by an orientation programme which included ‘life skills’ workshops focusing on assertiveness and other interpersonal skills; self-disclosure and self-awareness; managing barriers to growth like fear, anxiety and shyness and encouraging ‘risk-taking’. They would provide ice-breaking and team-building exercises, some theoretical knowledge, reflection and implementation through role playing of these concepts, and a ‘language’ about them that would allow their recall thereafter.
This would mark the beginning of developing a nurturing, supportive experience through which we sought to help students come to terms with the ‘Western’ English language-dominated university culture. After the school environment with its familiar social and educational rules and constraints, and the warmth and camaraderie of shared cultures and long-standing friendships with classmates, the University was potentially alienating by both size and culture to any new student. Our students would also have to bridge the gap from backgrounds often worlds apart in terms of electricity, flushing lavatories, large buildings, escalators and so on.

We planned to promote a close-knit learning environment of trust and friendship, where students could feel ‘safe’ enough to ‘take risks’. We would require them to draw on prior knowledge in their learning, demonstrating the importance we attached to their life experiences and ‘common-sense’ understandings. We would demonstrate through our own reflective processes and through students’ scenario-related tasks the notion that knowledge is value-laden and subjective with no single ‘right’ answers residing in an ‘expert’. Indeed through requiring students to attach personal values to their arguments we aimed to help students develop self-knowledge thereby promoting personal empowerment. For this purpose we similarly planned peer- and self-assessment processes.

Thus apart from the cognitive reasons for working from learners’ prior knowledge expressed through the PBL literature and by theorists like Entwistle and Ramsden (1983) and Rowntree (1981) there was a more emancipatory purpose. We sought to demonstrate to students how much useful ‘informal’ or ‘non-academic’ knowledge they did indeed bring with them to the University, how it helped them make sense of new knowledge and to dispel the ‘mystery’ around it before it settled (Hesketh and Ngubane, 1998).

Clearly the above plans to promote a ‘learner-centred’ experience were fundamental to achieving the ‘political’ and ‘adult and lifelong learning’ course aims and the interdependence of all three are illustrated below.
Course Plans – a holistic view

The three sets of aims relate to three interdependent aspects of the curriculum which were planned to work interactively to provide opportunities for students to develop into effective, critically reflective students on the path towards becoming ‘intellectuals’ (Jansen, 2001), as defined on page 91. I have developed the model below to illustrate our holistic approach, the synergy amongst the aims of promoting personal, academic and intellectual growth, and their joint reliance on a ‘safe’, nurturing learner-centred experience. It draws on curriculum and adult learning theory to conceptualise the way we planned to help students grow in intellectual maturity (Barnett, 1990).

**Figure 1: Student Development Model**
The model illustrates that providing opportunities to link new knowledge to prior, ‘common-sense’ knowledge and life experiences was conceptualised as fundamental to promoting academic, personal and intellectual growth. From the standpoint of academic development this is based on the premise that past experiences help students see what they still need to know and therefore to ask questions (Coles, 1997) that will help fill those gaps. It links to Vygotsky’s notion of working within learners’ ‘zone of proximal development’ to stretch them to reach the desired level of knowledge and understanding (Moll, 1990). Aware of the limitations of mediated, secondary experiences (Jarvis, 1987) this model relies on content material and teaching and learning processes that promote something as close to a primary learning experience as possible.

Similarly fundamental to the model is the promotion of self-worth associated with personal growth, and problem posing related to intellectual growth. The curriculum is thus designed to validate ‘marginalised’ and ‘common-sense’ knowledge and experience in relation to dominant knowledge linked to ‘Western’ cultures and experiences. It thereby represents knowledge and experience as subjective and uncertain, acknowledging the fundamental need, in our context, to help students develop a deep sense of self-worth (Beane, 1994) with skills like assertiveness to help them overcome the disempowering aspects of their past experiences. The content material is selected for its accessibility and relevance to past experiences and to concurrent academic learning to provide a meaningful, ‘authentic’ (Jarvis, 1992a) learning experience, involving feelings as well as cognition (Boud, Keogh and Walker, 1985).

At the same time a primary experience (Jarvis, 1987) of power-sharing through a relatively democratic, permissive environment (Freire, 1994) including egalitarian relationships with staff was designed to enhance learners’ personal empowerment. Through it we aimed to enhance students’ capacity to be assertive and self-aware and their willingness to take risks in expressing
personal views, discovering personal meanings (Ryan, 1997) and articulating personal beliefs and values in knowledge constructing processes. At the same time it should enhance students' intellectual growth through promoting the notion that knowledge is uncertain, open to "multiple interpretations" and involves "considered, personal commitment" (Ryan, 1997:131). (I elaborate the concepts of personal growth and empowerment on page 325, in relation to emotional and spiritual intelligence, and on page 335 in relation to learning as a liminal experience. There, I highlight the synergy between our practice and experiential learning in terms of our interest in promoting personal growth in order to empower the students personally).

The model illustrates how the curriculum should enable students to problematise situations, examine the assumptions underpinning related accepted knowledge and pose relevant reflexive questions. The approach should engage students as reflective, autonomous thinkers as they grapple to reach a decision on the 'problem'. Indeed we planned to provide experiences wherein "coming to grips with ideas of accommodation and compromise" students would be faced with "something of what it is like to bear responsibility". Furthermore they would catalyse "ideas about how solutions chosen can impact on real lives" (Skinner and Hesketh, 1997, attached as Appendix 4).

The relation between critical reflection and the promotion of social awareness or a "moral orientation" as one of the necessary conditions and disposition for "integrated critical thinking" (Mason, 2000:1) is represented in the model. It links to the 'wide-awakeness' discussed above, or criticality, and the application of sceptical attitudes, critical thought or 'intellectual' responses (Jansen, 2001) to one's social reality, the need for which was argued in relation to the South African context in Chapter One. It illustrates the link between a democratic experience and personal empowerment and the way they were designed to feed off each other.
Through involving students in critical evaluation of the curriculum and giving them space to express their ‘other-centredness’ by helping us reflect on the course as co-learners in the course development process, we aimed to enhance students’ self-confidence. At the same time it should strengthen students’ criticality just as critically reflective attitudes developed through the scenarios and related learning processes should, in return, augment students’ capacity to critically evaluate the course and their learning experience. Hence the criticality resulting from intellectual growth and the personal empowerment reached through personal growth and power-sharing experiences were perceived as mutually enhancing.

The model illustrates the interrelationship also between personal growth and empowerment and academic growth, whereby students become competent learners. Increasing assertiveness and self-confidence should enable students to participate actively in knowledge constructing processes, while mastering the discipline-based knowledge and appropriate academic skills and approaches should, in turn, enhance confidence and the willingness to take ‘risks’ in exploring ideas. By helping students meet the challenges of reflective rather than reproductive learning through developing skills in, for instance, research, problem-solving and critical reasoning, analysing and summarising information, the curriculum should help students to take responsibility for their learning to become more independent and self-directed.

This aspect of the course reflects a major focus in the PBL literature which claimed widely that PBL helped students on the one hand to think critically or analytically in order to ‘solve problems’ and reach decisions, acquire an appropriate body of knowledge and became self-directed, motivated learners. On the other hand it was said to enhance academic, team and communication skills. In our context, this included first, developing skills in the English language, an important element in enhancing learners’ self-confidence and competence, both fundamental to their intellectual development. Second, in view of their school experience, it included a focus on developing self-critical attitudes towards their learning styles.
Drawing on Weinstein (1990) we noted the importance of personal metacognitive awareness to learning, enabling students to structure their learning according to their strengths and weaknesses, and to recognise and adjust inappropriate learning patterns. The associated self-awareness and self-critical approach should enhance confidence and at the same time promote coherence with problem-posing activities and therefore integration of 'intellectual' attitudes and approaches.

The overall aim of helping students become effective and critically reflective, with 'intellectual' responses to knowledge, is represented in this model by our notion of providing learning experiences that promote a new relation to knowledge. This goes beyond aspirations for a level of academic competence that suggests knowing “how to go on” (Barnett, 1990:177), how to apply and recall knowledge. It involves 'higher' academic skills of deeply processing and elaborating knowledge associated with deep levels of understanding, seeing the connections between different areas of knowledge, between personal experience-based understandings and 'formal' academic knowledge, between theory and practice. These are associated with creative and autonomous thought and signal a positive and relatively 'fear-defying' response to the new freedom to think openly and to integrate new knowledge within personal conceptual frameworks.

These 'higher' skills thus depend on a level of critical reflexivity and personal empowerment. Their achievement is conceptualised in this model as an indicator that students are functioning effectively and reflexively and have reached a point in their progressive intellectual development towards incorporating some of the attitudes Jansen (2001) attributed to an intellectual on page 91. (These he related to the country's socio-political realities discussed on page 42).

Indeed, Barnett's (1990:156) concept of a "fully effective graduate student" resonates with this model, though it represents the student's development
throughout the years of undergraduate studies. He speaks of “a progressive intellectual maturity, whereby the student gains but breaks through relativism and critical thinking to attain a position of creative independence”. He thereby supports our plans to implement a more ‘political’ or ‘intellectual’ version of PBL than that found in the literature, underpinned by its professional development purpose. Our aim, at this early stage of their studies, and given the limitations of a one-semester course, was to help students find their way onto the path of intellectual development so that they could choose to continue along it independently thereafter.

This sets it apart from a ‘study skills’ module designed to help students adapt to and cope with current and future university studies, although it suffered the same limitations of a ‘one-off’, ‘additional’ course in a ‘mainstream’ curriculum. While related objectives are incorporated in the ‘academic growth’ aspect of the model, they are conceptualised in this model as part of what is drawn on to promote what Barnett (1990:156) called “progressive intellectual maturity”. Although he assumes a time span unavailable to our course, for this development to occur, he gives support to this model. He recognised the stages in this process to include “assimilating encountered knowledge; deep understanding; recognition of its provisionality and contested character; exercising critical judgement; being sensitive to other forms of knowledge, and relativizing one’s own experience; and taking a personal stand” (Barnett, 1990:156). These are similarly highlighted in the above model.

At the same time, although it goes beyond the scope of this study, he supports our aim to promote lifelong learning and concerned citizenship. Like Ryan (1997) he associated such intellectual growth, incorporating opportunities for personal meaning-making, with competencies needed for effective and efficient lifelong learning or a “life of reason” (Barnett, 1990:120). He argued for “the need for all citizens to have an informed understanding of complex matters” and to feel a sense of accountability for their democracy and the problems they face (Barnett, 1990:176), reflecting the concerns expressed in Chapter One to which this course responded.
The Curriculum - content, process and assessment

This section discusses how the curriculum plans, as conceptualised in the model on page 164, were translated into the course we developed in terms of content, teaching and learning processes and assessment methods, and is divided accordingly into subsections. We decided to organise the course around PBL through practical scenarios, as we understood the methodology, to provide an appropriate vehicle for grounding new theoretical, discipline-based knowledge in realistic situations. At the same time we thought the scenarios could be used not only for a new relation to knowledge through interactive, democratic learning processes and through stimulating curiosity and problem-posing from the beginning of our learners' studies. The objectives of the scenario or case method (Appendix 11) were set out for the students in their course outline, with an explanation of the approach, a suggested course of action, the need for students' participation, advice on writing reports and expected problem areas of the method.

Content

As discussed in Chapter Seven, our selection of content reflected different curriculum and pedagogical interests and purposes from practitioners in the PBL literature. Unlike the undergraduate PBL practices in the literature the selection of content was not constrained by either the need for its students to learn any particular body of knowledge in order to 'pass', or direct accountability to a profession. Realistic problems or situations were selected for their capacity to demonstrate the integrated nature of knowledge in terms of first-year Accounting, Economics and Commercial Law courses and how theory related to practice. A primary focus was their accessibility and relevance to our students in terms of prior, informal rather than discipline-based knowledge.
Bearing in mind our students' early stage of learning within the various fields of Management Studies and, moreover, their minimal prior experience of 'Western' dominated commerce, and reflecting the work of Cole (1997) we sought to empower them through an appropriate degree of concreteness. Content was selected for the framework it provided for receiving new information and developing new knowledge, as assumed in PBL. Working from within Vygotsky's 'zone of proximal development' (Jarvis, 1987; Jarvis et al, 1998; Moll, 1990) it was designed to push students' boundaries, creating both a need and a desire to learn something more about the subject.

The content was considered useful on grounds of its potential to promote not only deep level understandings (Entwistle, 1981) but also, most importantly to promote the elaboration of knowledge (Coles, 1997; Swanson et al, 1997; Woodward, 1997). It was used to help students make the links in their own minds, to see the inter-relatedness of knowledge (Coles, 1997) from the different disciplines, between prior and new knowledge and from theory to practice, through processes of grappling with a problem. Coles' (1997) definition is useful here.

For elaboration to occur, students should see their task as linking together aspects of knowledge both within and between subjects, and relating what they are learning now to what they already know. Students should be 'structuring' the information they are acquiring (Coles, 1997:319).

Course content was selected also, however, for its potential to provoke critically reflective questions, for instance, about the basis for business assumptions, the dominant 'Western' view and the need to 'Africanise' curricula in the social context discussed on page 34 (team meeting notes, 18 November 1996). Below is an explanation of how we used content in relation
to two practical scenarios or cases 'The Irony of Capital' (Appendix 12) and 'Sizwe Industries' (Appendix 13).

'The Irony of Capital' was theory-based. It aimed to facilitate students' drawing on prior knowledge and to provide a vehicle through which they could integrate the discipline-based formal knowledge learned within the first few weeks of university studies. Thus the content was not complex in terms of the amount of formal discipline-based knowledge it incorporated, or work experience it assumed, in contrast to how it was used in much of the PBL literature. On the other hand the 'Sizwe Industries' scenario portrayed a realistic, topical hypothetical business-related situation. It was complex in terms of raising socio-economic, political and ethical questions relevant to our context and purpose, but did not demand extensive understandings of formal 'management studies' knowledge.

A discussion of these two practical scenarios will clarify reasons for the choice of content. 'The Irony of Capital' started in the third week and its purpose is clarified in Appendix 14. Although theory-based, 'The Irony of Capitalism' raised topical issues of the time, commonly raised in the media and relevant to our broad context. While relevant to management studies and linked to the syllabuses of concurrently read courses in Accountancy, Economics and Commercial Law, they were not narrowly business-orientated in terms of reaching a decision to enhance profits for a particular business. The issues had wider implications relating to inequalities, exploitation of Africa by the 'West', the power of merging companies, capitalism and greed, the widening rich / poor divide and privatisation of state-owned assets. They set the scene for debates about different economic schools of thought with their pros and cons and the scenario was scheduled to take place at the time the different schools of economic thought were introduced in the Economics course.

The content material provided a basis for engaging students in reflection on how a country's economic system affects the type of business with its legal and accounting systems that can operate, and to promote fundamental
consideration of why markets and economic systems exist. It could be used to help students to elaborate knowledge, to clarify the link between economic systems and political choice and to show that no country has a 'pure' economic system but responds to its particular needs. The complexity was thus not in the realistic detail a manager would face in reaching a decision as found in the PBL literature. It was rather in opening up for discussion the taken-for-granted assumptions underpinning those complex business decisions, perhaps exploring contrasting perceptions of humankind as social or economic beings.

The related task of advising the Finance Minister aimed to promote critique, elaborated knowledge and deep level understandings of the different economic schools of thought, enabling students to make personal sense of new knowledge applicable to courses in Economics (the focus here), Commercial Law and Accounting. It could lead, for instance, to critique of the learned neo-liberal perspectives underpinning the Economics course that made ethical choices seem what (Raisner, 1997) called 'counter-intuitive' in the context of business's 'bottom line' dictating values and priorities.

Students could debate, for instance, whether the capitalist notion of motivating people by personal advantage was the most appropriate for South African business. On the other hand they could deliberate on whether, how, or to what extent aspects of the 'ubuntu' concept could or should become part of South African corporate culture. (This debate could take into account Lessem's (1996:38) warning that nepotism and corruption in South African government officials were a negative manifestation of humanism, prevalent in the late 1990s). The outcome of controversial debates such as these would be immaterial, the processes of critical reflection and opportunities for personal meaning-making were crucial.

The next scenario, 'Sizwe Industries' (Appendix 13), portrays a hypothetical, realistic, topical post-1994 South African situation. In contrast to the complexities of content material promoted through the PBL literature,
particularly at MBA level, the business decisions required by our ‘Sizwe Industries’ scenario did not rely on in-depth business analysis. It introduced students to the concept of bank loans and security issues, relatively foreign in their communities because of the political and socio-economic context and the banks’ reluctance to engage in transactions perceived as ‘high risk’. It also raised a problem regularly confronting economically marginalised communities at the time.

The scenario introduced basic concepts relating to economics, finance and banking, and commercial law, depending on very limited formal knowledge. Furthermore it drew on students’ prior, informal, common-sense, taken-for-granted, ‘practical’ or ‘tacit’ knowledge (Barnett, 1990; Jarvis, 1992b, Schön, 1987) that they may have never articulated, relating what they already knew to what they were learning.

its complexity was in balancing the demands of the social, political and business contexts. It raised intricate discussions about issues of ethics and social justice (like job creation in relation to economic development; criminality in relation to apartheid’s unjust ‘pass laws’), within the context of South Africa’s political transformation. The scenario thus aimed to promote critical reflection, challenging accepted knowledge and drawing on a natural intelligence, curiosity and morality before the students had learned the ‘facts’ of formal, discipline-based knowledge. It sought to open up for genuine debate “ideas sedimented within (the) professions and within traditional business thinking” (Hesketh and Ngubane, 1998). There was no agenda or power to defend but a freedom to “seek out new truths” (Faure, 1996:149) and respond as ‘intellectuals’ (Jansen, 2001) with the subject matter providing opportunities to recognise and debate distortions, unjust values and oppressive, hegemonic ‘facts’ (Schubert, 1986).

On one level content was hence selected for its capacity to demonstrate how economics, commercial law and accounting related to one another and to help students apply theoretical knowledge in realistic contexts, linking new to prior
knowledge. At another level it was used to catalyse discussions around interesting moral dilemmas embedded within it. For these purposes, scenarios were located in broad knowledge fields and selected with the aim of promoting learning that was interesting, evoking curiosity and emotional reactions, 'worth knowing', 'risky', deeply understood, memorable and usable in different situations (Entwistle and Ramsden, 1983; Dewey, 1916; 1915, in Barnes et al, 1994; Rogers, in Jarvis, 1988; Freire, 1994; Schubert, 1986, after Dewey; Stenhouse, 1975, after Bruner; Vygotsky, according to Jarvis, 1987; Jarvis et al, 1998, Moll, 1990; Wassermann, 1993).

The course thereby aimed to help students develop a new relation to knowledge, integrating new knowledge and ideas meaningfully within their own conceptual frameworks, making them personal, 'owned', 'believed', and therefore 'deeply' understood (Grundy, 1987).

Teaching and Learning Processes

The course team aimed to engage students actively in learning processes that demonstrated the value of their prior knowledge and allowed them to experience the way knowledge is socially constructed, changing their relation to knowledge and reducing their dependence on the facilitator for information. Through the focus on learning processes and a democratic teaching style (Jarvis, 1992a) we aimed to distribute power between learners and the facilitator so that learners could experience education as relatively democratic and egalitarian. To this end we sought to provide opportunities for students to negotiate the curriculum (team meeting notes, 18 November 1996). Moreover, we planned to promote assertiveness and self-awareness, starting from a specific focus in the orientation workshops and thereafter during the course to encourage their participation in, and therefore practice of, democratic processes and interpersonal and communication skills.
Various teaching and learning methods were selected to provide this democratic experience and to achieve the course aims and objectives, with the end aim being knowledge elaboration leading to effective, critically reflective students with 'intellectual' attitudes, as illustrated in the model of Figure 1 on page 164. Coles (1997) supported the view that knowledge is elaborated through a variety of activities that require students to grapple with uncertainty. They included group work, individual study and writing, researching and presenting ideas, test revision and the related formative feedback and constructive criticism from both peers and the class facilitators.

The course thus incorporated the following activities:

- interactive class discussions, debates and brainstorming;
- interactive small-group team-work in analysis of the 'problem' addressing issues arising from the scenario and reaching decisions;
- independent preparatory analysis of scenarios and acquisition of information needed to understand the 'problem' more fully;
- collaborative and independent SWOT analytical processes;
- independently written summary of scenario issues;
- independent research project;
- team development of business proposal based on research;
- oral informal presentation of individual analysis to small group or class;
- oral representation of group decision to class;
- formal oral presentation of small-group contribution to business proposal developed interactively by whole class.

An excerpt from the students' course outline, explaining how the practical scenario or case study method works (Appendix 11) gives a context for these methods, capturing something of the open, supportive, democratic teaching style and underpinning philosophy. It clarifies the methodology's objectives and approach, giving suggestions for preparing a scenario, participating in class, writing reports, and dealing with the method's challenges.
Small group, interactive learning situations were a major focus as we saw this as a means of affirming students’ own prior knowledge, helping them to relate it to new knowledge and different perspectives emerging through this process. Moreover, collaborative explorations into beliefs, values and understandings underpinning knowledge would be used to help students develop independent thought, deep understandings and elaborated knowledge, integrated within personal conceptual frameworks. The focus would be on interpreting and exercising judgment (Grundy, 1987), requiring students to exchange views, reflect on new ideas, accommodate or dismiss them, and review their positions in light of new knowledge. There would thus be a ‘safe’ environment in which to test ideas and experience ‘risky’ knowledge construction processes and the unsettling, new experience of knowledge being uncertain.

At the same time the co-operative tasks would allow students to experience mutually supportive learning and therefore to form informal peer study groups if they chose. They would also expose students to the kind of team project work they would encounter throughout their lives in the business world, demonstrating the kinds of interpersonal skills required. In addition to these, the small group preparation of one aspect of the business proposal and the inter-group task of integrating each ‘department’ were designed to promote knowledge elaboration, research, team and interpersonal skills. These processes would involve incremental oral presentation skills from intra- to inter-group communication, as groups would be inter-dependent for information about the different business functions, and to see their interconnectedness in the development of an integrated, holistic business proposal. These activities would also provide stepping-stones to the formal presentation by group representatives to an audience including tutors, the Dean and sponsors and the development of presentation skills and self-confidence. All students would be encouraged to field questions from the floor to explain the thinking behind the proposal, defend or re-think it.
The team meeting notes (13 December 1996) record the awareness that, to be effective, the curriculum required first, that the above methods were implemented through an appropriate democratic teaching style. Second, the students developed self-critical, metacognitive attitudes towards their learning approaches and progress and third, the methods were evenly balanced to cater for a range of preferred learning styles and to provide diverse assessment opportunities. We planned to explicitly promote a learning self-awareness and a healthy work ethic through questions about learning styles and strategies, in class, in ‘housekeeping’ sessions and in response to students’ requests and needs. We intended, furthermore to develop formative assessment procedures that would promote learning themselves.

A retrospective attempt has been made to capture and illuminate what we considered an appropriate style in excerpts from the Facilitators’ Manual (Ngubane, 1998b) relevant to the above scenarios, ‘The Irony of Capital’ (Appendix 14) and ‘Sizwe Industries’ (Appendix 15) and related tasks. The manual was developed in 1998 in an attempt to capture the experience of 1997, clarify the pedagogy and teaching style we considered appropriate, and suggest approaches for future course facilitators, particularly in the event of the Dean deciding to implement the course for a wider student body. These excerpts incorporate some of the lessons we learned during 1997 and 1998 about the implementation of the above methods and are attached to give a sense of the classroom experience, why the above methods were selected and specifically how they were intended to be or could be applied. (The teaching and learning methods are explored in relation to how well or badly we implemented them in Chapter Five).

**Student Assessment**

It was decided, in consultation with students, to use ongoing assessment rather than a final examination and the proposed assessment criteria and assessment methods are attached as *Appendices 7 and 8*. This approach reflected
recognition of the value of prompt and meaningful feedback in enhancing deep learning, in helping students assess their own progress and thereby empowering them. The focus was on how students applied knowledge in solving or posing problems, and therefore the extent to which they had taken it on as their 'own', rather than on any particular body of knowledge having been learned. (That would be considered, along with most other course objectives, against students' achievement in the mainstream courses of Economics, Accounting and Commercial Law, relative to the other students in those courses).

Opinions formed or solutions arrived at by students would never be marked as 'correct' in any formal or absolute sense. With the focus on learning process rather than solution (Gibbs, 1992) the answer would be considered 'strong' when students managed to convince peers or the facilitator of the importance and coherence of their arguments within specified contexts.

The relevant faculty committee accepted our argument that for students achieving more than 50% during their course work, no exams would be necessary. For those students who did not achieve 50%, or who wished to improve their mark, there would be a further assessment in the form of a 'three day research assignment' which would be interdisciplinary in nature and would be relevant to the content of the mainstream courses. In this way, weaker students would be given an extra research task that was to help them to some extent in their preparation for mainstream examinations. The marks would provide quantitative data reflecting the extent to which students met the assessment criteria and therefore the extent to which the course objectives were achieved. The course facilitator would award the marks with input from the external examiner.

Test material would be different from a conventional test in that the work would be new to students in the form of an 'unseen' scenario. It would be an 'open-book' test and students would be allowed to discuss the problem with peers and the facilitator as long as they referenced any ideas accessed in this
way. The test would therefore represent a ‘realistic’ approach to reaching a
decision. Students would be expected to apply the problem-solving principles
they had learned. Credit would be given for the choice of principles applied.
Knowledge of the principles would not be tested but students would need to
demonstrate understanding of the principle through their argument.

Assessment would also be qualitative in, for instance, assessing how
successfully students developed interpersonal and communication skills or
collaborative problem-solving skills through the process of contesting and
constructing knowledge. Although we predicted difficulties in reaching fair
judgements, we decided to try and observe as fairly as we could, student
behaviour in class, in terms of group dynamics and participation. Through
peer assessment also, we would seek to have assessed each group
member’s contribution to group work inside and outside the classroom. Each
group member would be asked to rate the others on attendance, contribution,
acceptance of responsibility, contribution to the oral presentation and co-
operation.

Attempts would also be made to assess students’ autonomy as learners and
researchers, beyond the grading of their work. The facilitator would assess
students through tasks and analytical reports accumulated in individual
portfolios. The students’ grasp and application of new knowledge would be
assessed on the basis of their individual scenario analyses. The extent to
which students’ understandings were internalised and therefore
accommodated within their personal value systems and their solutions,
recommendations or decisions ‘owned’ would be assessed through the
portfolios.

While Chapter Five shows the assessment plans lost a great deal in their
implementation the problems have since been largely addressed, as
discussed in Part Three’s Introduction. The PBL literature was helpful in this
regard.
Conclusion

In this chapter we have considered the course plans in terms of course aims and objectives and the curriculum experience the team sought to provide within the framework of PBL, as defined above, and as illustrated in the Student Development Model on page 164. We have looked at the way the course was designed to use both content and teaching, learning and assessment processes to provide an educational experience that was relatively 'political', ‘adult’ and ‘learner-centred', recognising the interdependence of academic, personal and intellectual empowerment in achieving the course aims and objectives. The chapter has thus explained how the curriculum was planned to provide learning conditions that the course team believed would affect the students' learning outcomes.

It is against these plans, aims and objectives that we will consider, in the following two chapters, where the approach was successfully implemented and where it was not, and thereafter the extent to which the course aims and objectives were achieved. Having looked at the plans we are now going to explore how successfully they were implemented and we will do so in the next chapter.
CHAPTER FIVE

COURSE IMPLEMENTATION

Having discussed the course plans we will now consider how successfully they were implemented, specifically in terms of the aim to provide students with a learner-centred experience. We will do so in three sections, which are:

- indicators of a nurturing, learner-centred experience;
- indicators of an egalitarian and democratic experience;
- course implementation problems.

The chapter will thus help me answer the research question about the relation between learning conditions and outcomes, through addressing the case study question, which asks if the course was effective in enhancing learning. I will focus here specifically on the sub-question that asks if the course promoted personal empowerment, as set out on pages 18 and 98. This exploration draws mainly on the team meeting notes of 1997 that record the course team’s critical reflections on the course, and the ongoing student feedback collected during and after the course implementation, as discussed in Chapter Three. The data provide a basis for suggesting strongly that the plans were, on the whole, successfully implemented and that students generally experienced the curriculum as personally empowering, associating this with good academic performance.

The 13-week (one semester) implementation phase was considered part of the ongoing course development and formative evaluation process, reflecting coherence with the radical constructivist interests underpinning the course itself, as discussed on page 90, and between theory and practice. Indeed, students and staff were engaged in the same kind of collaborative critically
reflective knowledge-constructing processes promoted through teaching and learning methods, in our attempt to understand the strengths and limitations of our practice as we implemented it.

Critically aware of the potential problem of students' feedback being positively biased, as discussed in Chapter Three, the team sought to limit this eventuality in a number of ways. We explained to students the importance of their input in improving the practice for future students, and urged them to participate in feedback processes through appealing to their sense of 'ubuntu'. Importantly, also, we sought to demonstrate and engage students in an iterative course development spiral involving critically reflective processes, within and about classroom activities. In this way we sought to provide coherence between teaching and learning processes on the one hand and course development processes on the other. To this end staff demonstrated, and engaged students in, the kind of approaches students were encouraged to adopt towards learning and knowledge.

In these ways we strove to demonstrate a democratic teaching style, our co-learner role in learning about the course, openness to, and interest in all criticism, reflecting the similar metacognitive approach we encouraged among students. We thereby offered students an open agenda experience and demonstrated our aim to understand how students experienced the curriculum for the purpose of improving it and enhancing its learner-centredness.

Crucial to this was the role of the facilitator, as it was to the iterative planning, development and implementation phases. The team meeting notes (1996, 1997) show he contributed a great deal to our deliberations on how to apply the proposed curriculum in the planning phase and to our assessment of each session's implementation through his reflexive attitude. He was indeed well qualified to do so, having postgraduate qualifications in both Education and Management Studies, the latter lacking in other team-members. However, this left the team very dependent on the facilitator, as he was on the team-members from outside the disciplines of Management Studies, for the value
they added, as education specialists, to the course deliberations, points to be re-visited in Chapters Nine and Eleven.

The course developers respected the facilitator for his qualifications, but also for his natural teaching 'flair', considered an extension of his vibrant, warm personality. His nature, disciplinary knowledge and the fact that he was, racially, an 'insider' to students, with relatively few cultural communication barriers, made the facilitator integral to the team's success. Also his perspectives and interpretations of the effects of the course in the classroom were informed by useful ongoing informal conversations with students, enhanced by excellent rapport with them. His critically reflective character also made the interpretations of such data enormously enriching to the study.

There was a level of personality difference and lack of accord that emerged in the team, that was typical of any team project and these are revealed below where they impacted on the practice. For instance we had different understandings of what we meant by a 'learner-centred' course, as elaborated on pages 204 and 206. There was, however, consistent agreement on the course's underlying philosophy and purpose.

Emerging from the implementation phase were data gathered through the processes discussed in Chapter Three indicating where our plans set out in Chapter Four were well implemented and where there were shortcomings and lessons learned. They included student feedback and team deliberations that reinforced our plans or informed subsequent changes. The 1997 experience, along with subsequent developments to the course raised further questions for reflection in Chapters Eight and Nine. Emerging from this chapter are questions about how universities cope with rapid change, developing curricula spontaneously in response to changing situations. They also ask questions about leadership and democratic course development processes and whether we should have conceptualised our practice as PBL.
The focus here is on the extent to which we did provide the educational experience planned to promote students' personal growth and empowerment we considered integral to achieving the course aims illustrated in the Student Development Model on page 164. There is, however, some overlap in these discussions with Chapter Six's exploration of the extent to which course objectives were achieved and a choice was made on how to present the data.

Objectives relating to personal empowerment like the development of interpersonal and communication skills, teamwork, summarising and writing, and practice in the English language are considered here for their impact on students' self-confidence, self-worth and assertiveness and therefore on students' engagement in democratic, egalitarian relationships. These objectives are perceived, however, to be foundational also to the development of learner competence. They have therefore framed the teaching and learning methods selected for their potential impact on learning. It thus made sense to explore data relating to those objectives in this chapter, while assessing the extent to which the proposed learner-centred experience was promoted.

On analysing the problems experienced in its implementation there were found to be a few common factors that detracted from its learner-centredness. I therefore decided to discuss these separately and collectively to provide a context for assessing the extent to which the course objectives were achieved in Chapter Six and for drawing conclusions to this case study that led to the reflections of Part Three. This chapter thus starts by considering indicators that suggest the students generally experienced the curriculum as nurturing and learner-centred. This is followed by more specific focuses on data indicating the successful implementation of egalitarian relationships with staff; democratic, curriculum negotiating processes; the teaching and learning methods themselves, including interactive, collaborative and independent learning processes and student assessment. Next is a consideration of the problems or shortcomings experienced and the lessons learned during the implementation process.
Indicators of a Nurturing, Learner-centred Experience

Drawing on Chapter Four's discussion on related aims and objectives, and the Student Development Model on page 164, in this section I consider data indicating that the curriculum was found to be nurturing, supportive and 'safe'.

Students indicated that they valued the experience for its nurturing, learner-centred nature in a number of ways. On being congratulated as a class, for example, on their very good first semester examination results, one student expressed the view that their academic success could be attributed more to the peer and staff support generated through the broad curriculum, than to the course itself (team meeting notes, 11 August 1997). This led to some discussion amongst students with the counter-argument being that it was the methods in the course itself that made them a close-knit group. Because of the possibility that students found it difficult to express 'negative' views about the course in this forum, the question was pursued through anonymous questionnaires in October (Appendix 7). Nineteen students (51.4% of respondents) agreed with the view that the camaraderie and support the students offered one another, and the attention they received from staff, helped them more than the course itself, reflecting the perceived value of our wider curriculum.

The following reasons were given to support the view that the broad curriculum impacted more on good grades than the course itself. They included:

- staff have been supportive and the support of other students has helped (for instance, if I am short of certain notes, I can ask other students for help);
- it is true because all the students work together as friends which has helped us in our other courses;
the support and encouragement of staff and students during unpleasant moments helped tremendously;
the support we received from (the programme) as a whole took us through the first semester.

On the other hand, students disagreeing with the statement, believed the course itself was integral to their academic success. They gave reasons that included the following:

the course helped me settle into university life and as a result, my marks improved;
the course helped me overcome shyness and increased my self-confidence;
the friendship, togetherness and support originate from (the course) without which we would not have become so close;
it provides us with attention to our needs, whether it be academic or social;
support from staff and students was motivating and the opportunity to discuss in small groups helped improve self-confidence and to gain other's views;
we worked as a team and conquered the odds;
the friendly competition also helped;
I think (we are) an unbeatable family;
the spirit of unity offered by students and staff gave us the extra energy we needed;
we get to know the members of staff through these classes and can talk freely with them;
excellent tutorials, staff support and the course all contributed to the results (a paraphrase from three students).

These views were reiterated in the October group interviews when a group (20.9% of respondents) volunteered that one of the most important course
outcomes had been the sense of solidarity and ‘family’ achieved through the course. They said the course had provided an important link between school and university.

Similarly the student mentors, commenting on the October evaluation report, as discussed on page 144, made the following comments:

- (the course) brought many benefits to students, for instance it provided a good introduction or orientation to university life;
- it helped students develop insights into academic life and to know what is expected;
- we got to know one another as a group and could help one another socially and academically;
- (the course) gave me the encouragement I needed.

Supporting this view were explanations in the October questionnaire, to a general question about the appropriateness of the course objectives. The following explanations related to self-growth:

- (the course) helped improve self confidence;
- it enabled one to express one’s views with confidence in public without fear of criticism;
- it helped me come to terms with my own points of view;
- it enabled students to argue their points.

This was further supported by four students (8.7%) specifically volunteering the course had been instrumental in helping them overcome their shyness and develop assertiveness in the June questionnaire. All groups agreed in the April interviews, moreover, that the environment had positively affected their personal growth, helped them make friends and brought the class together. There was evidence, furthermore, of students themselves contributing to the supportive experience. The team meeting notes (17 March 1997) record the generous and ‘nurturing’ response by the class to a student who admitted to
feeling “lost and stressed”. She was immediately invited to join an informal study group. On another occasion, (5 March 1997) the class rallied round a student who struggled to understand a particular concept until all were satisfied she understood. Indeed the nurturing ethos was extended towards ‘mainstream’ tutors who students considered ‘weak’ in their strategising to help them improve (25 March; 8, 22, 30 April; 6, 13 May 1997).

The above indicate that students valued the supportive, close-knit learning environment provided within and around the course. It was perceived to contribute to personal growth, peer support, the development of friendly relations with staff and the ability to express individual needs. These responses were supported by findings in the PBL literature (Aspy et al, 1993; Barrows, 1996 referring to Albanese and Mitchell (1993) and Vernon and Blake (1993); Stapleton and Stapleton (1998); Sobral, 1995 – from his ‘southern’, developing Brazilian society experience; and Vilkinas and Cartan, 1990, from their Australian perspective).

**Indicators of an Egalitarian and Democratic Experience**

In this section I draw on the discussion in Part One, and flag questions about PBL to be explored in Chapter Seven, about the role, in our context, of addressing students’ oppression and related vulnerability with regard to new social and educational demands and expectations. This involves investigating indications that the curriculum was experienced as egalitarian and democratic, before considering problems found and lessons learned. The focus is on relations established between students and staff; students’ engagement in curriculum critique and negotiation; the teaching methods planned to promote the learner-centred environment.
Egalitarian Relationship with Staff

It is difficult to assess how freely students expressed themselves in class or in our offices, but there are indications that students increasingly felt able to do so. Students 'dropped in' regularly for chats and raised concerns both academic and personal, particularly with the facilitator and our student recruitment manager, both black Africans (a man and a woman), and both warm, caring, approachable personalities. They were clearly better able to understand and respond to issues relating to cultural and family backgrounds than those of us who were non-African, and in this way alone enhanced the nurturing, learner-centred nature of the environment. Students quickly learned, however, to use the services of all staff members in accordance with their functions, interests, expertise and knowledge. For instance, students came to rely heavily on the administrative officer responsible for students' financial affairs, to help them resolve bureaucratic and financial problems.

The warm, open relationship with the facilitator was considered crucial to a nurturing environment. Recalling their first-year experience two years later, at the feedback session discussed on page 145, the students emphasised the importance of the open-door policy, particularly time spent with the course facilitator. They urged the new facilitator (a young South African of Indian origin) to be "open, friendly and very patient" with students wanting to talk, demonstrating the value they attached to this aspect of the experience. A student who had achieved some of the best examination grades expressed this view. The class confirmed his opinion that the course "was an important platform for students to deal with personal issues", enabled them to "gain confidence to say what they felt" and "helped them adjust to university life".

We observed the atmosphere in the class to be generally, friendly and light-hearted, closely reflecting the facilitator's personality (team meeting notes, 5, 12, 17, 26 March 1997). Indeed the response of the students on hearing the facilitator would be leaving indicated they associated the successful
implementation of the course with the facilitator himself. Along with the fun, he generated a great deal of respect for his intellect, from both staff and students, and trust that he genuinely and deeply cared about their wellbeing.

His commitment to the students and their positive relationship was evident in the constant flow of students into his office. This, along with his self-critical attitude, gave him a great deal of 'credit' with students and staff when plans were not considered to have been optimally implemented, or sessions were problematic. Energetic class discussions and lively debates, epitomising the underlying course philosophy, were attributed to this positive relationship of trust and openness (team meeting notes, 17 March 1997).

Sharing Power through Curriculum Critique and Negotiation

There were strong indications that the practice provided a novel, democratic experience for our students who valued the freedom it gave them to relate assertively to staff, on relatively equal terms, as course stakeholders whose curriculum ideas were respected. There were some indicators that students felt 'safe' and 'empowered' enough to raise issues or problems that would be perceived as 'negative' by staff. From this it is extrapolated that they experienced the curriculum as relatively democratic and egalitarian. These included students voicing complaints and influencing change in the curriculum and the programme's structure.

The team meeting notes record, for example, students’ complaints about the inconclusiveness of debates (4 March, 1997); typographical errors in worksheets (17 March, 1997); mainstream tutors' teaching styles (25 March, 8, 22, 30 April; 6, 13 May 1997); problems with the timetable (25 March, 22 April, 1997); problems with deviating from the session's plan at the request of some students (15 April 1997); content they considered inappropriate and unhelpful (16 April 1997); and suggestions for a different academic focus in specific sessions (24, 26 March 1997).
At the same time, students demonstrated confidence in themselves and the democratic process when they used their right to refuse permission for the facilitator to use a house-keeping session for ‘teaching’ when he asked (6 May 1997) if he could ‘make up’ time in this way. Indeed his accepting response reinforced their democratic ‘right’ and the session continued as planned and with the normal positive relations. In addition, students successfully negotiated a postponement of their final test through a sensible argument that had little, if any, negative impact on the course, and the most suitable date was democratically decided (team meeting notes, 20 May 1997). Students also provided a well-reasoned argument for curriculum change, in terms of the whole package of courses they should read in the second semester, and in both semesters for future first-year students. Subsequent years of students have thus benefited from their insights and negotiations for curriculum change.

The majority of students in this group, moreover, took it upon themselves to decide how they would structure their undergraduate studies and mostly against our advice, opted to structure their degrees over three rather than four years. Indeed 40.8% of the class succeeded in graduating after three rather than four years, despite their ‘reduced load’ in the first year, and consequent ‘overload’ in subsequent years from having to ‘catch up’ courses, compared with 16.3% of the 1996 cohort, demonstrating their sense of ‘rights’ and empowerment to assert their wills. It also indicated trust that we would support them in their decision even if we doubted their wisdom. (We considered it ‘risky’ in terms of losing sponsorship of their bursaries, which was, in fact, a reality for many who tried and failed to graduate in three years. Nevertheless changing perspectives of both students and sponsors have resulted in subsequent restructuring and a three-year programme, as discussed on page 79).

Careful consideration was also applied to problems we shared with students or critique of the course, with student feedback reflecting thoughtful responses, both negative and positive. We regularly found student perceptions added a useful dimension to team deliberations, rather than
merely confirmations of our views, or simply what students thought we would like to hear. Indeed insightful answers, particularly to open-ended questions in questionnaires, group interviews, ‘housekeeping’ sessions and informal discussions, emerging as data in Chapters Five and Six, indicate an openness and sincerity associated with respondents who “cared”. They indicated, also, that students felt they did have a stake in the course and a responsibility to future students to help us improve it.

Despite our ongoing quest for feedback (that must have seemed irritatingly frequent, repetitive and boring) the students showed an admirably generous and responsible attitude, and acceptance of their stakeholder-role, demonstrated by the high percentage of respondents in the data-gathering procedures described in Chapter Three. (Although there was no way we could make these processes compulsory, of the forty-nine students, all attended the April interviews; forty-six (94%) responded to the June questionnaire; thirty-seven (75%) responded to the October questionnaire and two years later, in August 1999, thirty-four (69%) attended the feedback meeting (with lunch!). We attributed this on the one hand to a sense of ‘responsibility’ and co-operation within an environment of friendship, mutual trust and respect that went beyond their close relationship with the facilitator who had left by the 1999 meeting. On the other hand we ascribed it to their sense of ‘ubuntu’ towards future students who would benefit from their input.

Students’ participation in the regular (voluntary) ‘house-keeping’ sessions also demonstrated ‘ownership’ of the course. It also promoted understandings about the aims and realities of the programme and avoided problems experienced in previous years relating, for instance, to suspicions about the programme’s agenda and related questions about its ‘blackness’ (since bursaries were only available to black African students) by discussing issues as they emerged. This sense of course ownership and understanding of the ‘bigger picture’ added to the above indicators, gave some confidence that the quality of the data received through evaluation processes was not biased
towards ‘positive’ comments to the extent that they were meaningless, as could occur within the cultural context.

The democratic processes thus served to produce data useful to the course development and evaluation processes, while personally empowering students through relatively democratic, egalitarian experiences. The teaching and learning methods themselves were designed to enhance the learner-centred experience, promoting personal empowerment while developing knowledge, skills and attitudes associated with effective learners.

The Impact of Teaching and Learning Methods, including Assessment.

In this section I explore what worked well in the implementation of the teaching and learning methods listed on page 176, before considering the problems met and lessons learned through the process. The methods are considered in terms of the aim to promote: interactive, collaborative learning; independent learning as discussed below in two subsections.

Interactive, knowledge-constructing processes and oral communication

Key to the successful implementation of these processes would be broad participation, lively debate and ‘fun’, interesting, controversial content, collaborative learning, drawing on prior knowledge, beliefs and values to express their views, listening to different perspectives. Such characteristics would indicate students had overcome the fear of new teaching and learning methods and the ‘freedom’ they represented, and that they had been successfully implemented.

Based on observation of interactions, constructive noise and the quality of arguments emerging from classroom debates, we considered students to have generally adapted quickly and enthusiastically to learner-centred
interactive learning processes so different from their prior experience. They also demonstrated students’ increasingly overcoming their reluctance to express their ideas in English, as they became involved in the arguments. From the start there were lively class and small group debates (team meeting notes, 5 March 1997). Ninety minutes was often insufficient to exhaust the richness of ideas that emerged. The notes reveal our excitement about students’ positive response and some awe for the facilitator’s capacity to generate students’ independent thought through questions (5, 12, 17, 24 March, 7 April, 1997). We likened his role to the conductor of an orchestra as he picked offerings from individual students to create a web of ideas and helped students see the connections between them, often using a ‘mind map’ (17 March 1997). He thereby demonstrated the elaborated nature of his own knowledge relevant to the course and his personal capacity and inclination to reflect critically on ‘accepted’ knowledge and to see the interconnectedness of knowledge, providing a learning role model. In the April interviews all groups agreed with the student who said discussions “increased their concentration” and prevented them from “becoming bored or drowsy”.

Students increasingly demonstrated the confidence to ‘think aloud’, drawing on their prior knowledge, expressing partially formed opinions or partial understandings, articulating personal beliefs to explore ideas and new knowledge with their peers and practise communication skills and the English language in the ‘safety’ of the nurturing environment. By the second week the facilitator felt himself being “led by the students’ excitement and enthusiasm” (team meeting notes, 5 March 1997). Twenty-seven students (55% of the class) contributed to the class discussion around ‘The Irony of Capital’ (Appendix 12). Animated sharing and challenging of ideas took place as students argued how they would advise Minister Trevor Manuel on economic policy. Students appeared excited and empowered to find their multiple personal understandings and opinions were valuable and relevant to the current South African situation and they did not need to rely on an ‘authority’ to generate knowledge.
Two students (who ended up being highly dynamic and top grade achievers) highlighted the big "jump" this entailed from their school experience (team meeting notes, 17 March 1997). Reflecting on the progress they had made after four weeks, these two explained as "science pupils" they had had no exposure to Economics and Accounting at school or debates "about facts". They had associated learning with "proven facts" and were disconcerted by the interactive, problem-based methodology to start with. The students said they felt seriously disadvantaged, indeed "confused" and "bored" by debates to start with, experiencing this approach as very "different", not seeing the value of the approach and feeling reluctant to take part. They said that once they decided to participate actively and test their ideas, even though they had no formal background in these subjects and were unsure of themselves, they found the methodology effective and particularly helpful for Economics.

In the April interviews all groups said they found interactive learning useful, with one group (16% of respondents) specifically commenting that they had learned the most through class discussions and enjoyed the "unique" opportunity to express their views in such an informal atmosphere. Five of the six groups (81% of respondents) specifically referred to the use of small group and class discussions in helping develop language and communication skills. They thereby supported the observations of the team (7 April 1997) who linked this to perceptions of students' increased self-confidence expressed above, and opportunities to practise assertive behaviour introduced in the orientation programme, and referred to during the course implementation (team meeting notes, 12 March 1997).

Strengthening this view were the 1998 student mentors' reflections on the analysis of the October 1997 evaluation. They emphasised the point that interactive learning empowered them to "say what they think and speak in front of others even if they don't know them" (in mainstream tutorials and lectures). They said that other students (lacking these learning opportunities) were generally "afraid to speak, especially African students" who therefore did not benefit from the kind of learning and confidence that came with discussion
In response to the June questionnaire, moreover, students mainly said that they had grown the confidence needed to express their views in various contexts, as set out in the table below.

**Table 2: Course impact on confidence in oral communication – student views**

<table>
<thead>
<tr>
<th>Questions</th>
<th>Respondents</th>
<th>Responses</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>No.</td>
<td>Total Positive</td>
</tr>
<tr>
<td>Helped develop confidence</td>
<td>46</td>
<td>43</td>
</tr>
<tr>
<td>in group discussions?</td>
<td>45</td>
<td>39</td>
</tr>
<tr>
<td>in class discussions?</td>
<td>46</td>
<td>39</td>
</tr>
<tr>
<td>to ask questions?</td>
<td>46</td>
<td>39</td>
</tr>
</tbody>
</table>

Most students demonstrated enjoyment and enthusiasm in their attempts to debate and understand complex issues (we observed students with sparkling eyes, sitting on the edges of their chairs, eager to speak and to hear). We noted a "tangible excitement in the classroom" (team meeting notes, 7 April 1997), following students out of the classroom to the chatter of continued discussions. A few less enthusiastic students later complained, in fact, that these conversations carried on throughout their communal meals, suggesting that learning was continuing outside the classroom, at least for some, as intended, and the content had stimulated interest.

In the June questionnaire, forty-four students (95.7% of respondents) said the course helped them learn to listen and consider another viewpoint, with thirty-one (67.4%) answering that the course helped very much in this regard. Then one reason volunteered for good marks in the October questionnaire was: "everyone made a contribution and you left the room knowing a lot more than when you came in. This is what helped achieve good marks". Extrapolated
from this is the fact that students valued others' opinions and developed 'other-centredness' or 'ubuntu' in the learning environment.

There were thus a number of indicators suggesting collaborative, interactive learning had been effectively implemented, having stimulated interest and participation in knowledge constructing processes, and promoted the incidental development of English language skills.

Aside from the spontaneous, informal oral exchange of ideas we had planned to provide opportunities for students to present their views more formally to the class, as set out on page 176. Both presenters and audience indicated very strongly in class (7 April 1997) that they found it enjoyable and helpful to start the discussion with a formal presentation of a prepared analytical report on the case. After some initial reluctance, we noted students competed for opportunities to formally present their ideas, questions and challenges and this approach appeared to be conducive to a high degree of participation.

There was also some indication that interactive learning had succeeded in promoting co-operation and collaboration amongst students. In the June questionnaire forty-three (93.5%) of respondents, responded positively to the related question with twenty-five (54.3%) saying the course had helped very much in this regard. (However the reminder that there were some students this method had not ‘reached’ from the remaining three students (6.5%) who said the course had not helped much in this way, is discussed below).

Most students highly valued the joint research project ending with a business proposal and the following reasons were offered:

- it promoted the spirit of teamwork (two students);
- it helped me understand how others see things (two students);
- it encouraged me to make an effort to present the work of the others out of respect for them;
- it led to co-operative learning (seven students).
Thirty-seven students (80%) also said they had experienced their classmates as learning resources. Their explanations included:

- debating helped us think and reason;
- sharing ideas helped us understand difficult concepts and discuss them;
- with our different backgrounds and ideas we knew different things and helped each other;
- hearing different views helped work out our own views;
- my classmates were like reference books.

There were, thus, some indications that interactive and collaborative learning had worked well and students appreciated the ‘team’ skills they had developed, though there were also lessons learned during the implementation process, as discussed below. We had planned to balance team processes with opportunities to work independently.

**Independent learning processes**

The successful implementation of independent learning processes would be indicated by students consistently preparing for class by producing the required written work; improved writing (and computer) skills; evidence of individual analysis and research with appropriate feedback.

Although there were problems in implementing these methods, the following indicators suggest some success. The requirement that students analysed and summarised cases individually before working collaboratively on them (see Appendix 11) was found to be a difficult task for students involving new summarising, analytical and report-writing skills. Many complained initially that it took a long time to produce a one-page analysis (team meeting notes, 5 March 1997) indicating their inexperience with this kind of task and the
importance of the opportunity to regularly practise analytical, summarising and writing skills as well as English language skills.

On being introduced to the SWOT approach to analysis (see Appendix 11), in fact, the facilitator found that although students did not handle their first attempt well, they "had at least recognised the approach as a tool for summarising information" (team meeting notes, 5 March 1997). Later however, student opinion supported the facilitator's report (team meeting notes, 7 April 1997) that 'academic writing skills' were improving by mid-way through the course. Then in the April group interviews (see Chapter Three) half the groups (48% of respondents) specifically volunteered their sense that they were writing better than was the case a few weeks earlier, a view confirmed fairly strongly in responses to the June questionnaire. When asked to what extent the course helped develop abilities to 1) summarise information 2) structure essays or reports and 3) synthesise information they responded as tabulated below.

Table 3: Course impact on academic writing skills - student views

<table>
<thead>
<tr>
<th>Questions</th>
<th>Respondents (46)</th>
<th>Responses</th>
</tr>
</thead>
<tbody>
<tr>
<td>To what extent did you develop the ability to:</td>
<td></td>
<td></td>
</tr>
<tr>
<td>1) summarise information?</td>
<td>46 100</td>
<td>No 20</td>
</tr>
<tr>
<td></td>
<td></td>
<td>No 19</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Not much 7</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Not at all 15,2</td>
</tr>
<tr>
<td>2) structure essays or reports?</td>
<td>46 100</td>
<td>No 13</td>
</tr>
<tr>
<td></td>
<td></td>
<td>No 24</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Not much 9</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Not at all 19,6</td>
</tr>
<tr>
<td>3) synthesise information?</td>
<td>46 100</td>
<td>No 19</td>
</tr>
<tr>
<td></td>
<td></td>
<td>No 22</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Not much 4</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Not at all 8,7</td>
</tr>
<tr>
<td>4) read appropriately</td>
<td>46 100</td>
<td>No 13</td>
</tr>
<tr>
<td></td>
<td></td>
<td>No 21</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Not much 12</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Not at all 26,1</td>
</tr>
</tbody>
</table>

While these views were generally positive, indicating students found the methods effective, they were less positive about these skills than about most other aspects of the course. They were supported by related general
comments and suggestions for course improvement in the October questionnaire, including:

- the writing and other academic skills helped us get good results in exams;
- students should be taught how to structure their essays;
- the course should include ‘business writing skills’ as sponsors ask students to write reports during their vacation work;
- it was good to have to use the computer – I hadn’t seen one before;
- we needed more help with reading;
- being a slow reader was a problem.

The last four comments remain relevant in light of subsequent data and are re-visited in Part Two’s Conclusion. Linking to methods for advancing writing skills were questions about the impact of research tasks, referred to in Chapter Four. Unlike students from more advantaged schools, our students had not experienced ‘project work’ at school, making ‘research’ a concept particularly new and challenging. We therefore sought to ‘de-mystify’ research. The marks and comments on their individual research projects showed that students had mostly learned to locate and acquire knowledge independently, with appropriate referencing. They also indicated students had indeed applied skills like summarising and synthesising information, though three students were found guilty of plagiarism.

An indicator that our approach to research had been effective was the response of five students mid-way through the course. They demonstrated their enthusiasm for research on informing the facilitator that they had formed a research group and wanted him to assist as a ‘research executive’ (team meeting notes, 16 April 1997). They asked him to suggest research topics related to economics, accounting and commercial law, demonstrating that the notion of research was ‘de-mystified’ and students were developing a new, more confident relation to knowledge.
At the same time, after suggesting students might like to write a scenario for future students, three students presented a case they had written. It brought in "Commercial Law issues, and the complexities of legal / moral issues, different traditions and accommodating customary law" (team meeting notes, 15 April 1997). The situation involved a shop owner, bankrupted because of his daughter's relationship with four boys, who paid a Sangoma (or witch doctor) to bewitch them. We attributed the content choice to appreciation of the relationship between learning and problem-posing. It suggested the students felt 'safe' enough to juxtapose the two cultures, and open for debate personal beliefs and cultural complexities. We attributed this to a personally empowering environment, and related it to the democratic teaching style, the kind of content we had selected for our cases and the kind of debates we had encouraged, appreciating the value-laden nature of knowledge.

Supporting the above indicators that students valued independent work and research were student responses to the June questionnaire (46 of the 49 students responded). They were asked specifically to what extent: 1) the course developed their ability to research a topic 2) the individual research project was a positive experience

**Table 4: Course impact on research ability and experience – student views**

<table>
<thead>
<tr>
<th>Questions</th>
<th>Respondents</th>
<th>Responses</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>No.</td>
<td>%</td>
</tr>
<tr>
<td>To what extent did the course:</td>
<td></td>
<td></td>
</tr>
<tr>
<td>1) develop research ability?</td>
<td>46</td>
<td>100</td>
</tr>
<tr>
<td>2) make research a positive experience?</td>
<td>46</td>
<td>100</td>
</tr>
</tbody>
</table>
Opinions volunteered about the research project and business proposal included:

- it increases research skills (10 students);
- your spirit as a researcher and learner is raised (1);
- made us research about things we didn't know about (1).

There was also one negative comment:

- it is time consuming and interrupts the learning procedure due to the amount of research.

The negative comment suggests that the student still related 'real' learning to learning facts for the imminent examinations and had not shifted from the 'school approach'. On the other hand most students' responses indicated they had developed new understandings about knowledge and learning.

Despite implementation problems, discussed below, students thereby indicated that they valued highly the learning that occurred through developing a formal presentation of joint research, in the form of the business proposal. Thirty-nine respondents (84.8%) said the business proposal exercise should be repeated the next year. In fact, when they met two years later (team meeting notes, 13 August 1999) these students recalled the business proposal and its research as a highlight of the course, valuing it for the skills, knowledge and confidence they developed. They also expressed the awareness that mainstream peers were given very limited research opportunities. Indeed they expressed disappointment in finding few research tasks in other courses, saying that the research project had, nevertheless, given them important insights into business contexts and skills 'for life'.

The data thus indicate some success in the implementation of the above methods, suggesting the teaching style and methods promoted skills in writing, research and the kind of problem-posing attitude we associated with
personal empowerment, self-belief, and a questioning relation to knowledge. However the data reveal important areas for improvement, discussed below.

Course Implementation Problems

Although the overall impression was that the course had been beneficial and that many of the course objectives had been achieved, as discussed above and in Chapter Six, critical reflection revealed that our plans (idealistic as they were) fell short in their implementation in three main areas. The problems related primarily to the course’s hasty development, the consequent skimpy preparations, as represented in Table 1 on page 99, and the ‘learning-by-doing’ nature of the process.

Associated with this and with the team’s inexperience was first, our failure during the planning stage, to note and reflect on our assumptions underpinning the terms we used and the expectations we held. There were therefore different notions amongst the team of what we meant by a ‘learner-centred’ course. While we had agreed that the course should be relatively learner-centred, democratic and egalitarian, we had not agreed on boundaries for these concepts or how closely the course should be guided by the broad-brush plans in its implementation. In fact on a continuum between an emergent, learner-driven approach and a structure-driven approach, we found the facilitator to be closer to the former, than the rest of the team (team-meeting notes, 10 March 1997). Similarly, and related to this were a second set of problems around managing and administering the course when we had not discussed the details of what we each assumed would happen in this regard. These in turn impacted on the third problem area around actually implementing the teaching and learning techniques on page 176.

‘Negative’ data indicated something of the potential value of the course was lost in its implementation. They related primarily to the above areas and are discussed collectively in this way for two reasons. First, they give a context for the discussion in Chapter Six, which explores what, where, and to what
extent course aims and objectives were achieved. (This discussion acknowledges there were flaws in implementing the course plans, and that these impacted on the course’s potential to achieve those objectives and lessons learned). Second, they provide a platform for drawing conclusions to this case study made in relation to subsequent course developments discussed in Part Three’s Introduction and lead to the second-spiral research questions addressed in Part Three.

**Seeking a Balance between Authority and Democracy**

Although the above data suggested strongly that the curriculum was experienced by students and observed by the team to be learner-centred, egalitarian and democratic, there were indications that a different balance between these opposing poles would have improved the course in some ways on some occasions. Furthermore they indicate a lack of clarification about what we considered an ideal balance, and why and how it should be established and maintained. Working in a context where students’ social and educational experience had been autocratic, it was particularly relevant to make explicit ‘power’ issues and related tensions and contradictions clarifying, for instance, what was negotiable and what was not (Taylor and Burgess, 1997). For instance, we conceptualised the course plans as a guiding framework for staff and students or a “guard-rail, enabling rather than constraining”, to keep our focus on learner needs and course aims and objectives (team meeting notes, 17 March, 15, 21 April 1997). The facilitator experienced the plans as constraining, however. He argued that “the underlying principle of the course was flexibility” and his spontaneity was compromised by course plans (9 April 1997), and, if he had to adhere to them, he may as well be a mainstream lecturer” (15 April, 1997). He thus demonstrated a personal preference for allowing the course to ‘emerge’.

Confirming this stance in the course planning stage the facilitator described his previous approach as “largely learner-driven” with “the students set(ting) their own agenda”. He judged it appropriate, however, that this course
“become more structured” (18 November 1996) since it was to be credit-bearing and a pilot project that could inform future developments for the faculty (team meeting notes, 14, 18 November 1996; 12 March 1997).

However, this clearly meant different things to different team-members and it became apparent that the facilitator’s position was closer to the ‘emergent course’ end of the continuum than the other team-members who placed more store by the course plans. This was illustrated by the course facilitator’s response to discussion about a session having gone ‘off-course’, that “course scheduling may have an adverse effect on the interest, patience and trust of students. We must be tolerant of their requests and needs and must nurture their trust” (team meeting notes, 14 April 1997).

Indeed the facilitator’s energy and enthusiasm was related to this spontaneity and flexibility, and the team considered his democratic style crucial and fundamental to the course’s success along with his judgment, ‘instinct’ and ‘flair’ that generated fun, excitement and curiosity in the classroom. Their concern was that the ‘guard-rail’ should help the facilitator make the best possible snap decisions in class about the direction a session should take. We all recognised the impossibility of consistently ‘getting it right’ when spontaneous decisions involved weighing up multiple factors that could impact on students’ learning and the facilitator expressed regret when he judged he had taken a decision that had detracted from the session (team meeting notes, 17 March 1997).

The data revealed several instances that illustrated our different positions on the democracy / authority continuum. To demonstrate the democratic nature of the course, for example, the facilitator started an early session by simply asking students what they wanted to do. He thereby deviated from agreed plans, with the purpose of “gaining the trust of the students” (team meeting notes, 10 March 1997) seeking to show them their input really would influence curriculum decisions, as we had said. We noted a group of more confident students used the opportunity to ask questions relating to concepts introduced in their Economics course, sparking a dynamic and valuable interaction
amongst students and between students and the facilitator. Despite our surprise in the change of plans the team was gratified by students' "adult, critical response, and a real openness to learning" (team meeting notes, 10 March 1997) and the democratic experience it provided students.

With hindsight, however, we could have recognised the heralding of a recurrent problem and better heeded Freire's (1994:112) warnings against allowing the "trickl(ing) away" of content as a result of "spontaneous practice...devoid of limits". The open-endedness of the facilitator's question implied that the course was open to student input, beyond the point later found to be considered appropriate by both staff and students. It demonstrated the willingness of the facilitator to change his plans for the session and follow the lead of a few students, without clarifying to them what he (and the rest of us) had planned, why, and how that related to the whole course and its outcomes. While intending to enhance its democratic, 'student-driven' nature the facilitator's flexibility and spontaneity thus excluded most students (and the team) from curriculum decisions, ironically diminishing the course's democratic character.

Associated with this, however, was a remarkable capacity for generating trust and positive, friendly classroom relations and a flair to inspire interest, on which we depended. We noted, however, that not all students' needs were being met and some were disappointed with the change of plan (team meeting notes, 14 April 1997). As the course proceeded, the team meeting notes show the curriculum specialist's increasing frustration with the tendency to allow the course to be diverted by particular, immediate learner needs at the expense of developing the course optimally. She considered it problematic, illustrative of having confused a student development and course development focus (team meeting notes, 14 April 1997). The notes reveal concerns over the course's loss of momentum and focus and the need to be broadly 'disciplined' by the framework.
While the facilitator referred regularly to the 'student-driven' nature of the course, the curriculum specialist questioned what this meant, "in the context of a session that lacked a plan and for which he had no specific outcomes in mind" (team meeting notes, 21 April 1997). She suggested this had more to do with what the facilitator called his "laissez-faire" approach than to a commitment to democratic processes. This reflected some frustration at the facilitator’s repeated unwillingness to identify, and adhere to, specific session objectives. As well as a curriculum difference it indicated an ideological one, highlighting the problem of the team not having clarified understandings and expectations at the start.

Although the data indicated the course was largely experienced as democratic, they also reveal shortcomings in this respect. For instance, students had been unable to negotiate a more interdisciplinary focus with less concentration on economics and more on law and accounting issues (team meeting notes, 8 April 1997). The facilitator argued this was inevitable, reasoning that all cases are biased and his bias was towards economics, his area of specialisation and interest (9 April 1997). It highlights, however, an area of unpreparedness in the team, in that we had assumed agreement on how to implement the proposed interdisciplinary focus, without foreseeing the challenges in achieving this. It also recalls Jarvis’ unheeded warnings (1988:168 drawing on Dewey) about the insidious, subtle control that can be exerted over learners by a learner-centred facilitator guiding the activity of the learner “into channels that express the teacher’s purpose rather than that of the pupils”.

Students expressed frustrations also when time and energy was lost negotiating what transpired to be non-negotiable, indicating how our failure to clarify the boundaries detracted from the course. The facilitator had thought students would quickly conclude for themselves that their idea of developing a real rather than hypothetical business proposal in the time available was unfeasible and expressed his reluctance to impose this ‘reality’ on students. After an hour-long debate he intervened, pointing out the logistics involved
and they acknowledged the truth of this, expressing frustration with the process.

The facilitator, however, argued that the time was not wasted, seeing it as “motivational” to let students consider the pros and cons of the matter, and an opportunity to develop decision-making skills and experience democratic processes. He had worked hard to engage everyone in the debate and to offer a ‘choice’ giving “credit to the open teaching approach”, but agreed later that it was not an honest session, in that there was in fact no choice (team meeting notes, 23 April, 1997).

Frustrations also arose from students’ misuse of democratic power. Some students pointed to their peers’ response to their democratic freedom, saying at times students used spontaneous class discussions to purposefully “side-track” the facilitator and “high-jack” the session (team meeting notes, 15 April 1997). A group of five students complained in class that this happened when certain students had not done the required preparatory work or did not want to proceed with the next task, by prolonging or diverting discussions or group allocation negotiations. They expressed frustration at the waiving or compromising of agreed session plans in these ‘student-driven’ processes.

The group argued, furthermore, that students should not have had the power to change a session’s focus when they wanted to use it to help them prepare for a mainstream test. While we had judged it an effective session and case (24 March 1997) valuing it for its relevance to economics, legal and accounting concepts and accommodation of a shift in focus within those parameters the students argued that their peers had misused their ‘freedom’. They said it was “wrong to change the direction of the course for the sake of students who had not done their work”, arguing that we should not allow our course to simply serve other courses. We should rather treat it as a serious course in its own right. About half the class indicated support for a similar argument that students’ attitudes were “negatively affected if we shift the schedule” (team meeting notes, 15 April 1997).
The students thus highlighted the challenge of finding the 'ideal' balance between authority and democracy and allowing a course to emerge within set boundaries when there were multiple perspectives on the experience. However there was substantial support for the view that the facilitator's willingness to go 'off-track' in response to some students' requests, in fact compromised the democratic rights of others. Following this session, we agreed that we needed "a course which disciplined us as well as the students" (team meeting notes, 15 April 1997), reflecting Freire's (1994:114) argument for "the hard, heavy work of serious, honest study, which produces intellectual discipline".

This reinforced our concern that the course's identity was being sacrificed and it could be perceived as a 'soft option' or 'service course' (team meeting notes, 14 April 1997). Indeed it recalls Muth et al's (1994) similar finding that a decline of rigour could creep in once facilitators adopted co-equal roles in their aim to foster participation in democratic processes. It also highlights the fact that we had failed to clarify amongst ourselves, or with students, what we regarded as negotiable in the course and what we did not.

The above instances demonstrate our difficulty in finding the elusive, ever-moving 'ideal' balance between authority and democracy and suggest this negatively impacted on the course. They linked also to problems in managing the course and administering course plans that similarly had not been thoroughly planned.

Course Management and Administration

Key to good management of the teaching and learning processes and administration of the course plans was clarity about what we intended and efficiency and consistency in administering these intentions.
The dynamic classroom, with the myriad ideas generated, made it extraordinarily difficult, and sometimes counter-productive, to maintain a planned focus. It required quick decision-making about how to manage the learning processes, where to let the class run, where to impose a direction and where to institute a change of activity. The facilitator noted the difficulty in always making what he would later judge to be the ‘best’ decision (team meeting notes, 12 March 1997). The outcome was usually one of highly relevant, vibrant debate and learning but sometimes at the expense of meeting student and staff expectations. This resulted in losing value in terms of course focus, progress, or objectives; clarity of student requirements and consistency in ensuring the requirements were met (team meeting notes, 3 March, 14 April 1997).

This section initially explores implementation problems relating to course management and administration. The team meeting notes record our concern that our idealistic course plans depended, for their implementation, on the facilitator’s considerable teaching “flair and student rapport” and teaching style which was a manifestation of our educational philosophy. We were worried that, should the course be adapted for wider use, and we needed to work with other course facilitators, perhaps from ‘mainstream’ academic staff, we might struggle to implement our course. One of the anxieties was that the course was not being “captured” in materials that could demonstrate the course philosophy to a new facilitator (5, 12 March 1997). (The facilitator’s handbook was produced the following year for this purpose. Two excerpts are attached as Appendices 14 and 15).

Course management problems reflected the negative side of the above positives including the facilitator’s professed enjoyment and energy derived from “flying by the seat of his pants” (team meeting notes, 18 December 1996; 6 May 1997). They are discussed below in relation to his personal preferences and style referred to above; his attitude to course structure, planning and scheduling; and limited experience in implementing the selected teaching techniques in this context.
The preference for a spontaneous and flexible teaching style made the course full of surprises and interest for students and the team, with frequent changes to the course’s broad-brush schedule.

The facilitator regularly used leeway in the broad-brush plans to bring in relevant, topical and interesting slants to a discussion, at a moment’s notice, drawing on the depth and breadth of his own knowledge to generate the energy and excitement about learning discussed above. At the same time there were negative impacts, for instance where a personal preference for spontaneity and unpredictability, exploring the new rather than following up the old, meant some loss to the course in terms of implementing plans or consolidation through re-visiting previously introduced issues or concepts.

Indicators emerging through student feedback, course evaluation and team meeting notes (3 March, 14, 15 April 1997) suggest that this personal preference was a dominating feature of the course in both its positive and negative aspects. The facilitator explained it as “boredom with structure” (team meeting notes, 6 May 1997), acknowledging a need to be more flexible about his position on the continuum between the ‘emergent, learner-driven’ and ‘structure driven’ poles (team meeting notes, 10 March 1997).

On the negative side a spontaneous change to a previously agreed focus or method, however brilliant, meant the session was not meeting student expectations, diminishing their stakeholder status. It also meant the team were unexpectedly excluded from curriculum decisions. Moreover, these often led to a focus on economics-related issues (team meeting notes, 9 April 1997) at the expense of promoting the interdisciplinary nature of the course. Indeed questions or debates about economic issues were used as ‘fillers’ on occasions, when management and administrative difficulties meant materials were not prepared on time. Ready-written, short ‘economics’ cases extracted
from an American economics book on cases (Pleeter and Way, 1990) were used, for instance, for this purpose. The students did not rate the session highly, complaining that the course lost direction and its interdisciplinary identity (team meeting notes, 9 April 1997).

Similarly, a personal preference for working to tight deadlines was imposed on students and the team, with the late provision of materials (and research topics) causing serious concerns and some frustration. Throughout, however, the facilitator maintained his excellent relationship with students as demonstrated in class (team meeting notes, 9, 21 May 1997). This indicated the considerable 'credit' he had with students in terms of trust and mutual respect and his willingness to make up the lost time by meeting with them after hours to act as 'consultant' as they developed their business proposal.

These problems link to the facilitator's expressed personal antipathy towards structural constraints and meeting deadlines (team meeting notes, 15 April 1997). At the time they seemed a small price to pay for the vibrant and dynamic interactive learning we saw in the sessions, and on which we depended for implementing the course. In any case we felt unable to address the problem at the time, resulting in some acceptance that agreed, deadlines, plans and decisions were not being met (team meeting notes, 5, 12, 24 March; 12, 21 April; 27 May 1997), a point for reflection in Chapter Nine. We did not know, until later, how much of a 'pattern' this would be and it was not until all data had been gathered that its impact could be assessed.

Problems with course structure, scheduling and consistency

This introduces the second problem area of the relatively 'unstructured' nature of the course where it threatened course focus, direction and consistency and, at times, student interest. In the October questionnaire a number of suggestions for course improvement linked course spontaneity to the negative
impact of disorganisation, supporting the above data and suggesting the need for better time management, discipline and effective teaching techniques. Related suggestions included:

- more time should be allocated for communication between groups;
- group discussion time should be cut down because this is seen by many as an opportunity to chat;
- individual work should be regularly submitted and discussed, though it is not necessary to have all work marked;
- (materials) should be in the form of a book as some of the articles have already been lost;
- the number of sessions should be reduced as there was too much overlap of information;
- the amount of work should be reduced and the teaching style adapted to prevent boredom.

Such comments recalled our questions about students who participated less in discussions or who complained about inadequate closure to discussion when time ran out. Our deliberations were informed by a group of students who said in the group interviews that the ‘Sizwe case’ had been one of the best, that it had worked well, but “there had not been enough time to discuss it fully”. They suggested there should be “a clear schedule of work to be done”, to avoid the negative impact of running out of time, or having small groups misusing their time, allowing discussions to deteriorate into irrelevant ‘chat sessions’ (team meeting notes, 8 April 1997).

This feedback supported the view that there was, at times, inadequate use of a session framework to guide quick curriculum decisions within it and to thereby help the facilitator keep on track, in terms of plans for the session or broader course objectives. Indeed a plan framework could also have been used to guide decisions on where to deviate from plans, to accommodate an interesting debate, as it was not intended to be “controlling” (team meeting notes, 14, 15 April 1997). Students expressed frustration about time
constraining discussions or debates and preventing the 'closure' they sought. Bearing in mind Knowles' (1978) warning that neat conclusions can impact negatively on students' thought processes, bringing an end to reflection and discussion, we thought there would be benefit in more planning, focus, direction and consistency (team meeting notes, 3, 4, 17 March; 14, 15, 21 April 1997).

Team debates were fuelled by nearly half the students specifically saying, in group interviews, that a more structured approach would enhance learning. Although five out of six groups (81% of respondents) said the interactive learning methodology helped them understand other courses, three groups (48% of respondents) specifically volunteered the view that more structure would enhance its effectiveness (8 April 1997). On one occasion, the facilitator improvised admirably in a plan change but afterwards described the exercise as one of 'damage control' and a 'mop-up' when materials were not prepared in time (team meeting notes, 17 March 1997). The team agreed that since important learning took place through small group problem-solving and problem-posing processes, these should be well managed in terms of time and direction (team meeting notes, 21 April 1997).

There were thus some indications that valuable small group learning opportunities were lost because of mismanagement. When time ran out they tended to be replaced by quick, interactive class discussions with the facilitator valiantly, trying to involve the whole class, but engaging mainly the most orally communicative ones. While the class may have been 'consulted' about this change of plan, there was in fact often no option, because of time constraints. Furthermore, students who voted for a class discussion rather than small group work often did so because they had the confidence to debate within this context (and had the loudest voices). On the other hand some saw it as a less demanding option, an opportunity to engage less with the issue (team meeting notes, 16 April 1997).
Aside from sending a 'message' that the course was not 'serious' and providing students with a poor role model in terms of time management, and diminishing students' stakeholder role, inadequate management thus affected the quality of the learning experience. The above data suggest the course would have benefited from better administration, more clearly defined parameters within which to operate and more adherence to our course 'guardrail'. Furthermore they suggest a need to balance student input with adherence to broad course direction and objectives, and to clarify links between sessions and how they related to the course as a whole. There was a related problem of unclear instructions to students and inconsistency in following up their implementation.

Confusions arose, for instance, after the facilitator failed to take in work he had required from the students. On the following occasion he found some students had not completed the set task, believing he would not ask for it (team meeting notes, 10 March 1997). The next week some students claimed they were unsure of what was required and were embarrassed to find the facilitator wanted to see their work. In some cases they had prepared well for oral presentations of their case analyses but had only scrappy notes to speak from (team meeting notes, 17 March 1997).

Lack of clarity and consistency in terms of tasks and requirements thus created some confusion and compromised course rigour as did some of the improvisation required when deadlines were not met.

Implementing appropriate teaching, learning and assessment techniques

Ryan (1997:133) draws on Albanese and Mitchell (1993) and Brookfield (1987) to note the difficulties in finding the 'right' balance between promoting self-directed learning and "teacher-directiveness" and general agreement about the advantage of "critically responsive teaching", relevant to the above problems. By this he refers to "the kind of micro-decisions that are made by
the teacher in response to a particular classroom situation, and takes into account both the identified needs of the student in relation to their immediate learning goals, and the broader course-related goals...

In implementing the teaching and learning methods planned, as discussed on page 176, we experienced some problems, most of which related to managing interactive, collaborative learning processes. These are discussed below, first in general, second in specific terms of engaging the quieter students and third in relation to student assessment.

The facilitator reported difficulties in finding an effective balance and moving between small group interactions and whole-class discussions as discussed above. Report-backs to the whole class generally followed small group discussions. Through them we aimed to enable students to compare and challenge other groups' solutions, to provide insights relating to different focuses or tasks, to generate knowledge through debate, to develop analytical, summarising and communication skills and self-confidence. Although students had indicated the importance of arriving at some sort of conclusion to the debates, as discussed above, we repeatedly observed difficulties in this area.

There was a lack of momentum and "drop in energy" which we attributed to boredom or fatigue in students, during this feedback process (team meeting notes, 4, 5 March, 16 April 1997). The facilitator said he felt unsure how to counter this tendency, expressing a need for "theoretical knowledge on how to sum up without losing the students' excitement" (5 March 1997). We grappled throughout the course with this problem, recognising that for the value gained class feedback sessions often took too long and did not provide the effective 'wrap-up' we had anticipated.

There were problems, furthermore, with time allocation for the various teaching and learning processes. The facilitator's expressed frustration about how long it took students to "come up with the terms and concepts he was
trying to lead them to" (team meeting notes, 10 March 1997) recalls Ryan's (1997) dilemma above. On the one hand the value of providing information to enable the students to incorporate it in pursuing their deliberations, had to be weighed up against the principle of students discovering new knowledge for themselves, to assess the cost-benefits in terms of time and learning. At the same time it contradicted our radical constructivist philosophy (see Chapter Two) that argued students should not be led towards a particular end in the learning process. Such dilemmas reflect the challenge of 'learning-by-doing' when quick, unanticipated decisions within a dynamic classroom situation needed to be made. They argue for an 'enabling' course structure, conceptualised as a 'guard-rail', to guide them in relation to the intended focus and objectives of the session (team meeting notes, 14, 15 April 1997).

In fact, we decided there were occasions where 'knowledge transmission' was appropriate and effective, particularly when underpinned by a democratic teaching style in accord with Jarvis (1987; 1992a, 2002a) and Delors (1996). There was one occasion when the facilitator 'taught' for forty-five minutes, constructing a summary on the board in the form of a concept map, of the different schools of economic thought. We judged the session to have provided some "security and a sense of pulling things together" for students in terms of recapping previous discussions and relating them to theory. We noted students appeared captivated, alert and engaged by the content material and teaching method (team meeting notes, 12 March 1997) and, in the interviews, highly valued this session (team meeting notes, 8 April 1997).

In our meeting two years later, students commented on the strengths and shortcomings of the course as they recalled them. They said at first they found the cases and the methodology very confusing and "inaccessible" with the facilitator assuming they understood more than they did when he "introduced so many ideas and we didn't see where we were going" (notes 13 August 1999). This strengthened the suggestion that a firmer sense of course structure or direction would have made the content more accessible and,
moreover would have promoted participation by those students who had been left perplexed and silent (team meeting notes, 12, 26 March 1997).

The students raised problems, furthermore, with assessing students’ degree of participation arguing people participated differently, with quieter students often being less communicative while still attentive (notes 13 August 1999). They thereby reiterated concerns expressed in the October group interviews, when two groups (27.9% of respondents) specifically pointed out that “some students do not like to participate but are doing well on the course”. They said: “students can be listening actively without speaking” and should not, in such cases, be judged to be non-participative. These comments relate to concerns about the mark students were given for participation.

Participation

Students thus raised our concern for those ten students who appeared from our observations to participate far less than the others in learning processes (team meeting notes, 10, 17 March 1997). We noted they rarely voiced opinions in either class or group discussions, unless directly asked, but asked questions and offered opinions for the first time during a session that helped them prepare directly for a mainstream course test (26 March 1997). Hence, we attributed this to a more instrumental than ‘intellectual’ interest in participating. On the other hand we found ‘non-speakers’ to be participating in the debates in the sense that when the facilitator asked them direct questions they gave sensible answers (10 March 1997).

Nevertheless an important course objective was to help students develop confidence and skills in communicating, linking to our interest in promoting personal growth, hence our ongoing concern about engaging the less participative students more fully (team meeting notes, 23 April 1997). Concerned that some felt intimidated by other group members we grappled with ways to “dampen” dominating students’ ardour without losing their
interest. Feedback at our 1999 meeting (notes, 13 August 1999) confirmed the problem. A student, with the group’s agreement, argued for the importance (and rarity) of the learning opportunity the course had offered within their package of courses, but expressed regret that “unassertive” students had benefited less from the experience as they had participated less. The students agreed ways should be found to encourage all students to participate in discussions, saying “no students should be allowed to dominate others” and “shy students must not be intimidated when asked to participate”. They thus reflected our concerns suggesting the need for skills in managing group processes and other teaching techniques to reduce the problem.

Similarly, the data suggested collaborative tasks could have been better managed to promote more even participation. They gave opportunities for students to develop research, interpersonal and leadership skills but also allowed some to “cruise”, taking on fewer responsibilities and letting down their peers (an experience shared also by Bligh (1995) and Thomchick (1997) in relation to their PBL practices). This resulted in discord within and between groups as students attempted to draw on each group’s work to present a coherent business proposal, compounded by the “stress of running behind schedule” (team meeting notes, 28 May 1997). Indeed in the June questionnaire, eight students (17.4%) said their classmates had not been a very useful resource to them in preparing the presentation, suggesting some had lacked a sense of accountability to the group. This was supported by peer assessment of group members’ participation. Although this was problematic, as discussed below, it suggested some students had done less than their share of work.

**Student assessment**

While assessment criteria were laid out for registration purposes (*Appendix 10*) the implementation of our assessment plans was indeed problematic. The external examiner referred to our assessment practice as a “design, which, in
terms of intent, meets with best practice ... since it diversifies the assessment contexts considerably, mixing group and individual assessments, self- and peer assessment, conventional measures (such as tests) with presentational assessments, and so on. Such diversification of assessment contexts represents a global shift towards greater authenticity (gaining clearer measures of what students actually know) and equity (providing more opportunities to perform well in different contexts) in assessment practice" (Jansen, 1997a).

Relevant to the above discussion on course management and administration problems, he went on to say, however, that “the organisation and management of the assessment protocols represented a major headache for external examination”. He listed as problems the bulk of information; inadequate explanation of the system; assessment criteria being “unclear and trivial”; poor management of the system; several cases of plagiarism; scores were too uniform and too high, suggesting an “inadequate system of differentiation among students”.

The facilitator felt “misunderstood” and we subsequently held a formative meeting with the external examiner (team meeting notes, 12 September 1997), exploring options for the improvement of our assessment practice. The discussion revealed that our problems really boiled down to lack of organisation, consistency and attention to detail. Because of the above assessment problems, grades for this course were not included as a means of quantifying what students had learned in the course. In any event they provided no comparison with other students’ performance as do the quantitative data of Chapter Six.

Student feedback on the assessment methods (Appendix 9) also informed subsequent developments. Because of our interest in promoting student participation in interactive learning processes we tried to assess students on their participation in learning processes through observation, self- and peer-assessment. Contrary to Allen et al’s (1996) finding that students enjoyed the
sense of control over their peer's behaviour that peer assessment gave them, our students resisted it, probably reflecting cultural difference and the traditional African reluctance to make one person stand out amongst the others. They said it was very difficult for them to do and, with very few exceptions, rated one another with uniformly high scores reflecting some of the problems of 'accuracy' raised by Arbee (2000b) quoting Boud (1989) and Boud (in MacAlpine, 1999). Subsequent developments are referred to in the Conclusion to Part Two.

Aside from the implementation problems associated with limited time and experience and 'learning-by-doing', the assessment difficulties reflected challenges inherent in assessing 'process' skills like interpersonal, team and oral and written communication skills. Furthermore we were interested inter alia, in how much the course had helped students grow in self-confidence and assertiveness (see Appendix 10 for assessment criteria). We made no attempt to measure such developments in individual students, but sought to explore indicators suggesting personal growth and empowerment generally in the students.

Despite its limitations students generally expressed the view that qualitative, formative assessment was a new, interesting and helpful experience. They responded very positively to the open-book final test, although they found there was little time to refer to the books. The test was designed to test their problem-posing skills rather than to test any particular content and in this regard we considered it an accurate reflection of the curriculum. Furthermore, student feedback indicated they found it fair and unthreatening being required to apply a familiar strategy (SWOT analysis) to unfamiliar content material supporting Andrews' (1997) finding that students benefited from being given a strategy for analysing and solving a case.

The students, similarly, valued the personalised detailed feedback on their written work and some took the time to discuss these with the facilitator. The facilitator expressed frustration, however, with the frequency with which
students repeated mistakes of language or structure in their writing, indicating that they did not internalise all his suggestions for improvement. He reported, nevertheless, that in general students had developed better arguments and "waffled" less by midway through the course (team meeting notes, 9 May 1997). Although he planned to qualitatively assess each student's progress through the portfolio of work submitted, through comments and grades (team meeting notes, 9 May 1997), this was not pursued.

**Conclusion**

This chapter has explored the learning opportunities offered by the curriculum in terms of the qualitative, formative data, indicating where the course plans were well implemented and where they were not. The data strongly suggest that students experienced the curriculum as relatively nurturing and learner-centred, egalitarian and democratic, valuing the friendly, informal relationships with staff, particularly the facilitator, and opportunities to share power through negotiating the curriculum. Furthermore the students demonstrated participation in democratic processes like the course evaluation procedures, offering perspectives that informed developments both in that year and in subsequent years.

The data also strongly indicate that students believed the environment helped them develop self-confidence and the kind of relationships with their peers (and with staff) that were conducive to exploring new ideas and constructing knowledge collaboratively. Indeed just over half the students said that they thought this environment was key to their academic success, with the other half arguing that the nurturing environment outside the classroom was vital but was given substance by the teaching and learning that occurred. At the same time, data specifically relating to the implementation of selected teaching and learning methods also revealed some specific areas of success, namely in collaborative, interactive learning, oral communication, independent learning processes like summarising and research.
At the same time, some data indicate areas in which we fell short in the implementation of the course. These related to the hasty process of planning, developing and implementing the course in nine and a half months and the inexperience of the course team. This resulted in skimpy plans with insufficiently thought-through issues and inadequately clarified understandings and assumptions; course management and administration problems and a lack of experience in implementing appropriate teaching techniques. This was not unexpected in view of the 'learning-by-doing' nature of the process as urged by the faculty dean, and it resulted in a number of lessons learned and subsequently implemented. These data inform the Part Two Conclusions, along with lessons we learned in the five succeeding years, as the iterative course development process continued.

Having explored the strengths and weaknesses of the course implementation against the plans, and specifically the question of the curriculum's effectiveness in promoting personal growth, it is now time to answer the two remaining sub-questions about the course's capacity to promote both academic and intellectual growth. We will do so in the next chapter.
CHAPTER SIX

COURSE EVALUATION

Having found strong indications that students and staff had perceived the curriculum as conducive to personal growth, we will now address the remaining case study sub-questions about its capacity to enhance academic and intellectual development. To do so we will explore relevant data and for this purpose the chapter is divided into two main sections, which are:

- quantitative data;
- qualitative data.

The qualitative data is considered in four subsections, which are:

- learner autonomy;
- metacognition;
- authentic knowledge, deeply processed and elaborated;
- criticality.

The subsections relate, on the one hand, to the question of the course's effectiveness in promoting academic growth through knowledge acquisition and the development of effective skills and approaches like problem-solving, self-directedness and metacognition. These data are considered in terms of the course aims to provide an 'adult' and 'lifelong learning' experience. On the other hand, the subsections reflect the question that asks if the curriculum induced intellectual growth and a new relation to knowledge. This question concerned students' capacity to: construct 'personal', 'authentic', 'elaborated' knowledge; pose problems; recognise knowledge as contestable and related to power; exercise judgements in 'problem-solving' situations to reach
decisions incorporating personal values and social, ethical considerations. Data relevant to this question reflected the team's 'political' interest and related course aims.

In addressing these questions this chapter illustrates that there were strong indications that the curriculum helped the students to develop the knowledge, skills and approaches needed as competent students and independent thinkers. It therefore contributes to the answer to the research question that the course was an effective tool in enhancing learning, and suggests what kind of learning opportunities affected the outcomes.

As pointed out in Chapter Three this case study sought to produce mainly qualitative evidence, primarily for the purpose of understanding the strengths and weaknesses of the curriculum, improving it and possibly adapting it for application elsewhere. However quantitative, statistical data are used as a check and a basis for considering the qualitative data, in relation to the above course aims and objectives. They were gathered over the four years up to 2000, to assess the academic performance of the 1997 cohort of students and have been statistically analysed through chi-squared tests, as discussed in the methodology chapter on page 107.

**Quantitative Data**

The graph below (Figure 2 on page 227) compares the grades achieved by 'our' and 'other' students across all level one course examinations common to all first-year students. Thus they represent a comparison of marks of 'our' and 'other' students for courses for which both groups attended the same lectures, wrote the same examinations, had the same markers and the same external examiners. The course under study was excluded from this comparison since it was not available to 'other' students. Indeed it was an important differentiating factor in the two student groups' experience.
The figure below represents the percentage of examinations that yielded the following categories of marks for both 'our' and 'other' students: first class (75% and above); second class (60% - 74%); third class (50% - 59%) and failures (49% and below).

**Figure 2:** Distribution of 1997 level 1 examination grades comparing those of 'our' and 'other' students over all examinations written

The Dean congratulated us, and our students, on these “remarkable results … notably better” than those of other first-year students (Lumby, 1997). The data were found to be statistically exceedingly significant ($\chi^2 = 259.766$, $p<0.0001$; see Appendix 23 for calculation), adding weight to the qualitative data that suggested the curriculum we offered helped students achieve better grades. Furthermore, while 34.7% of 'our' students received the Dean's Commendation - an award associated with the number of first class passes and overall quality of grades attained, 6.7% of the 550 'other' first-year students achieved this. This too was found extremely significant, statistically ($\chi^2 = 42.902$, $p<0.001$; see Appendix 31 for calculation).
A number of explanations for this were explored. First it was recognised that the reduced load of courses taken by ‘our’ students (7 mainstream courses plus the course under study) compared with ‘other’ students, with 10 mainstream courses, could have influenced their comparative success. Minimising this factor, however, we subsequently found, in 2002 when ‘our’ students took a full load of all 10 mainstream courses for the first time, plus a developed version of the course under study, ‘our’ students still outperformed the ‘others’ ($\chi^2 = 145.865, p<0.0001$; see Appendix 29 for calculation).

In the June 2002 examinations 32.4% of ‘our’ students achieved the Dean’s commendation compared with 7.3% of the ‘other’ first-year Bachelor of Commerce students (Lumby, 2002). This degree of better performance was also statistically extremely significant ($\chi^2 = 27.214, p<0.001$; see Appendix 31 for calculation). At the same time, 19% of the ‘disadvantaged’ group earned the Dean’s Commendation, compared with the ‘other’ 7.3%, showing statistical significance ($\chi^2 = 4.077, p<0.05$; calculation in Appendix 32). These data inform the reflections of Chapter Ten in relation to the transferability of the course conclusions to other contexts. Interesting here are the different levels of performance of ‘our’ students from ‘advantaged’ and ‘disadvantaged’ schools compared with those of ‘other’ students who were mostly from relatively ‘advantaged’ schools, as discussed on page 83 and illustrated in Appendix 3.

Second, and returning to the 1997 focus, ‘our’ students’ grades might have reflected stronger academic ability. However, a comparison of matriculation points showed they had no advantage in this regard, over standardised matriculation examinations. Appendix 16 illustrates the distribution of matriculation points of ‘our’ 1997 group, relative to ‘other’ students, was bunched in the ‘average’ category of 36-39 matriculation points with a smaller percentage in both the higher and lower categories.

In a comparative analysis of grades against categories of matriculation points ‘our’ students also achieved better grades than those of ‘other’ students,
across all categories. *Appendix 17* illustrates this point through the comparative distribution of grades for Commercial Law 1A by matriculation points, as an example. Despite small numbers in some categories it indicates 'our' students generally performed better. The data were found to be statistically significant in all but the category of 32-35 matriculation points as illustrated in *Appendices 42 – 46*).

Third, a potential factor influencing 'our' students' relative success, was the selection criteria applied (*Appendix 2*) in our aim to recruit students with the potential to do well. Aside from academic ability we sought students with, *inter alia*, appropriate attitudes and motivation to overcome the disadvantage of their poor schooling. The fact remains, however, that 'our' students attended disadvantaged schools, came from poor socio-economic backgrounds and spoke English as a second or third language. In contrast, according to the University's Division of Management information, 71% of 'other' faculty students in 1997 were 'non-Black African', and therefore came from better schools and socio-economic circumstances and spoke English as a first language. At the same time, the comparative data reflect grades gained by all Management Studies students, 'ours' and 'others', in the same examinations, written under the same conditions, at the same time, and marked by the same discipline specialists.

Fourth, there were factors other than the course under study, within the entire learning 'package', that could have affected 'our' students' development. Clearly they were not isolated from life and were exposed, *inter alia*, to mainstream lectures and tutorials offered by departments, along with 'other' students. in addition our programme offered them (and not 'other' students) 'extension tutorials' attached to Economics, Commercial Law and Accounting courses and foundation courses in Mathematics and Computer Literacy.

While these might well have influenced their comparatively good grades, however, Chapter Five records complaints from students that confirmed our observation that the teaching and learning outside our course was generally
traditional, being content-based and teacher-centred. It reflected a less open, democratic experience and did not offer the same freedom for students to think, indicating that our course provided a different experience with different development opportunities that even the 'extension tutorials' lacked. There were, hence, some indicators that the course might well have been an effective tool for helping students grow academically and intellectually to develop an 'intellectual' relation to knowledge and learning.

Table 5 on page 231 adds to the argument. It compares the average grades of 'our' and 'other' students of the 1997 cohort through all the course examinations, written and marked at the same time, under the same conditions up to 2000. Until the year 2002 'our' students were encouraged to structure their degrees over four years, and were therefore expected to have graduated by 2000. (As discussed above and on page 80, this did not amount to a significantly lesser load per year as the average mainstream student also took four years, to accommodate repeat courses, according to the University Statistics Department). However, Chapters Two and Five both referred to the 40.8% of 'our' 1997 cohort graduating in three years rather than the planned four, fairly mirroring the 'mainstream' students, of whom over half took four rather than the planned three years to graduate, according to the University Statistics. This explains why the table below includes numbers and performance of the 1997 student cohort (of 'our' and 'other' students) in level three (major) examinations in their third year (1999) or fourth year (2000).

The table thus gives the number of students and average percent mark achieved for each course for three groups of students: 'our' 1997 cohort of 49 students; 'our' whole group of the 1997 cohort plus repeating students; 'other' students of the 1997 intake, including repeating students. (The last two columns thus make a fairer comparison in their inclusion of repeating students, while the first two show 'our' repeating students generally brought the average percentage mark down slightly from that of the 1997 group alone).
Table 5: Comparison of average grades of 'our' and 'other' students across all undergraduate courses: 1997-2000

<table>
<thead>
<tr>
<th>Courses</th>
<th>Year</th>
<th>'Our' 1997 cohort - first registered in 1997</th>
<th>'Our' whole group including repeats</th>
<th>'Other' students including repeats</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td>No.</td>
<td>Ave%</td>
<td>No.</td>
</tr>
<tr>
<td>Economics 1A</td>
<td>1997</td>
<td>49</td>
<td>66</td>
<td>54</td>
</tr>
<tr>
<td>Economics 1B</td>
<td>1997</td>
<td>49</td>
<td>71</td>
<td>53</td>
</tr>
<tr>
<td>Comm Law 1A</td>
<td>1997</td>
<td>49</td>
<td>67</td>
<td>53</td>
</tr>
<tr>
<td>Comm Law 1B</td>
<td>1997</td>
<td>49</td>
<td>66</td>
<td>49</td>
</tr>
<tr>
<td>Accounting 1A</td>
<td>1997</td>
<td>49</td>
<td>77</td>
<td>49</td>
</tr>
<tr>
<td>Accounting 1B</td>
<td>1997</td>
<td>49</td>
<td>71</td>
<td>49</td>
</tr>
<tr>
<td>Mathematics C³</td>
<td>1997</td>
<td>12</td>
<td>85</td>
<td>42</td>
</tr>
<tr>
<td>Mathematics C³</td>
<td>1998</td>
<td>36</td>
<td>78</td>
<td>36</td>
</tr>
<tr>
<td>Statistics C</td>
<td>1997</td>
<td>49</td>
<td>65</td>
<td>76</td>
</tr>
<tr>
<td>BIS 1A¹⁰</td>
<td>1998</td>
<td>47</td>
<td>60</td>
<td>87</td>
</tr>
<tr>
<td>BIS 1B</td>
<td>1998</td>
<td>47</td>
<td>57</td>
<td>84</td>
</tr>
<tr>
<td>Economics 2A</td>
<td>1998</td>
<td>47</td>
<td>62</td>
<td>50</td>
</tr>
<tr>
<td>Economics 2B</td>
<td>1998</td>
<td>48</td>
<td>54</td>
<td>58</td>
</tr>
<tr>
<td>Comm Law 2A</td>
<td>1998</td>
<td>41</td>
<td>59</td>
<td>53</td>
</tr>
<tr>
<td>Comm Law 2B</td>
<td>1998</td>
<td>39</td>
<td>62</td>
<td>50</td>
</tr>
<tr>
<td>Accounting 2</td>
<td>1998</td>
<td>47</td>
<td>55</td>
<td>63</td>
</tr>
<tr>
<td>BIS 2A</td>
<td>1999</td>
<td>12</td>
<td>54</td>
<td>24</td>
</tr>
<tr>
<td>BIS 2B</td>
<td>1999</td>
<td>11</td>
<td>55</td>
<td>24</td>
</tr>
<tr>
<td>BIS 3A</td>
<td>2000</td>
<td>2</td>
<td>57</td>
<td>18</td>
</tr>
<tr>
<td>BIS 3B</td>
<td>2000</td>
<td>2</td>
<td>70</td>
<td>14</td>
</tr>
<tr>
<td>Accounting 3¹¹</td>
<td>1999</td>
<td>39</td>
<td>47</td>
<td>62</td>
</tr>
<tr>
<td>Accounting 3</td>
<td>2000</td>
<td>18</td>
<td>49</td>
<td>47</td>
</tr>
<tr>
<td>MAF 3</td>
<td>1999</td>
<td>39</td>
<td>46</td>
<td>73</td>
</tr>
<tr>
<td>MAF 3</td>
<td>2000</td>
<td>17</td>
<td>52</td>
<td>39</td>
</tr>
<tr>
<td>Auditing 3</td>
<td>1999</td>
<td>6</td>
<td>51</td>
<td>23</td>
</tr>
<tr>
<td>Auditing 3</td>
<td>2000</td>
<td>10</td>
<td>42</td>
<td>33</td>
</tr>
<tr>
<td>Taxation 3</td>
<td>1999</td>
<td>9</td>
<td>68</td>
<td>21</td>
</tr>
<tr>
<td>Taxation 3</td>
<td>2000</td>
<td>10</td>
<td>45</td>
<td>35</td>
</tr>
</tbody>
</table>

Table 5 illustrates how 'our' 1997 students achieved particularly good grades relative to the 'other' students in their first year, reflecting the above graphical

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8 In 1997 twelve students read Mathematics C in their first year, because of their strengths in mathematics. The others read it in 1998 after a maths foundation course.  
9 1997 students all read Statistics C in their first year, along with the 1996 cohort, hence the large number in 'our' whole group.  
10 1997 students read BIS in their 2nd year, 1998 (after an introductory course). From 1998, students read BIS in their 1st year, hence the large number of 'our' whole group.  
11 Nearly half the 1997 cohort graduated in 3 years instead of the planned 4. The following level 3 courses are therefore presented for 1999 and 2000.
illustration and discussion ($\chi^2 = 259.766$, p<0.0001; calculation in Appendix 23). They produced better average marks than 'our' whole group in all level one courses, with the least difference in Business Information Systems (BIS) and were markedly higher than those of 'other' students with the least difference again in BIS. The table demonstrates that while 'our' 1997 cohort generally achieved better averages than 'our' whole group and 'other' students in level 2 courses, the difference was often less marked. While less significant statistically than the comparative performance of 'our' and 'other' students across level 1 courses, the result was still extremely significant for level 2 courses ($\chi^2 = 36.320$, p>0.001; calculation in Appendix 33).

In the table above, the small numbers for BIS (increased greatly in recent years) make the comparison less valid but marks are very similar across all groups, while the two students in level three BIS courses are included for interest and to complete the picture. The BIS marks generally reflect the situation acknowledged by BIS staff, 'our' staff, 'our' students and 'other' students in curriculum development meetings (Arbee, 2000c) that lead to curriculum reform. Inadequate access to computer technology was acknowledged as a factor that disadvantaged black African students. The difficulties our students experienced recalls also the students' request for more integration of Information Systems concepts in the scenarios to help them understand the IBS course. However they recall also the mismatch between the kind of knowledge and learning our course sought to promote and the focuses and interests of the BIS and Accounting courses. (BIS was located within the Accounting department). This, with subsequent developments, requires some reflection in Chapter Eight).

The level 3 courses, however, showed a different picture. The relationship of the data was reversed ($\chi^2 = 20.3$, p<0.005; calculation in Appendix 34) to show the 'other' students performed significantly better than 'ours'. This was the subject of a great deal of research and reflection, resulting in curriculum negotiation with tutors of our 'extension courses' in level 3 accounting.
courses, (and some statistically fairly significant, positive results in 2002) as discussed in Chapter Eight, on page 344.

The table above illustrates, nevertheless, that 'our' students achieved better grades on the whole than 'other' students who had written the same examinations, at the same time and under the same conditions, despite inequitable backgrounds. While there were a number of variables that could have influenced 'our' students' better performance, as discussed above, the curriculum under study, unavailable to 'other' students, was a key differentiating factor. This chapter explores below further explanations for 'our' students' relatively strong performance. It is assumed, however, that the above grades indicated some mastery of academic knowledge and application of effective academic skills, attitudes and approaches.

The Dean of the faculty was emphatic about the difference between students who learn enough to get by, and those who make personal sense of what they are learning, with the latter gaining high grades. He said that in order to award first class passes "examiners must have found evidence of critical, independent thought and deep understanding" (Lumby, 2000). He thereby reflected Coles' (1997:315) argument that students with the highest grades engage not only in 'deep-processing' but also 'elaborating' their knowledge to see the "links between different knowledge areas" thus promoting the retrieval, "far transfer" and application of knowledge.

The Student Development Model on page 164, representing the course aims, objectives and underlying philosophy, illustrates how we aimed to promote 'higher skills' associated with effective, critically reflective students, including metacognition, deep-processing and knowledge elaboration. While the students' grades suggest that most students had indeed developed these 'higher' skills and capacities, the chapter now focuses on qualitative data to explore indications of a link between the grades and the course.
The comparative grades could be interpreted to indicate a number of possibilities, four of which are suggested below. First, it may indicate that 'our' students in all categories of matriculation points had been held back by their poor schooling, and their matriculation grades provided a relatively deflated reflection of their academic potential. Hence their better performance in all categories as compared with 'other' students, as in the example of Commercial Law grades, discussed above on page 229, illustrated graphically in Appendix 17 with statistical tests shown in Appendices 42 - 46.

Second, it might indicate a host of other factors like, for instance, 'our' students' levels of motivation and determination had been successfully identified in the selection processes to the extent that it had overcome disadvantages of schooling, language and socio-economic background. Third the 'affect' in the curriculum, with its teaching and learning processes might have given the students the confidence and self-esteem to grapple with knowledge in new, 'daring', 'intellectual' ways and therefore to learn meaningfully. Fourth, it might indicate that the course, central to the broad curriculum experience and available only to 'our' students; made a difference quantifiable in terms of examination grades and might therefore be considered an effective tool in enhancing learning.

Chapter Five explored course objectives relating to our aim to implement a learner-centred curriculum to promote personal empowerment. It therefore focused on data indicating where we succeeded and where we failed in promoting an egalitarian, democratic experience, through which students could develop healthy self-concepts, confidence in written and oral communication and analytical skills associated with problem-solving. It focused on the implementation of selected teaching and learning methods applied mainly to realistic, accessible scenarios.

According to the model on page 164, this aspect of the course was fundamental to inducing both intellectual and academic growth in order to develop effective, 'intellectual' students, as defined on page 91, (and at the
same time, critical citizens and lifelong learners). It also illustrates how all three aspects were interdependent. The next section explores qualitative data indicating course strengths and limitations in relation to those aims and objectives related to intellectual and academic growth that incorporated, but went beyond, developing the competencies and attributes of problem-solvers associated with PBL, as discussed in Chapter Seven.

**Qualitative Data**

In this section we explore the data for indicators of the course's effectiveness in achieving our objectives and hence promoting the 'intellectual' characteristics illustrated in the Student Development Model on page 164. They are considered below to help answer questions about the curriculum's capacity to affect outcomes and, specifically here, its effectiveness in enhancing learning, through promoting academic and intellectual growth. These questions are addressed through looking at data in the following four subsections: learner autonomy; metacognition; authentic knowledge, deeply processed and elaborated; criticality.

**Learner Autonomy**

This refers to students who "actively seek out information" (Jarvis, 1988:84), taking responsibility for their own learning, rather than being dependent on their teacher. It relates to the shift in the teacher's emphasis from "dispensing information to helping learners seek, organize and manage knowledge, guiding them rather than moulding them" and catalysing "independent learning and research" (Delors, 1996:144-145) associated with curiosity, creativity and exploring alternatives. It relates to Knowles' (1978) concept of self-directed learners accessing the learning resources they need for the rest of their lives.
Thus indicators of self-directedness would include:

- actively seeking information;
- learning independently of teacher’s instruction;
- organising and managing knowledge.

The team meeting notes of 12 March 1997 record an example of students’ self-directedness. The ‘Sizwe Industries scenario (Appendix 13) required students to find additional information and to make a calculation that was relatively complex at this stage of their learning, in order to assess the situation. We considered the scenario to have been effective in that we observed the students responding with interest and curiosity to the related tasks, acquiring information needed for entering the debate and reaching a decision. In the words of one student the course “created a demand for knowledge and aroused our interest in the other courses, helping us understand them” (June 1997 questionnaire)

Clearly, there is nothing conclusive about the course effectiveness from this kind of data but our observations were supported by students’ views expressed in the June 1997 questionnaire. They mostly said they thought the course had helped them take responsibility for their own learning and develop confidence in their academic ability, as illustrated in the table below.

**Table 6: Course impact on self-directedness and academic confidence – student views**

<table>
<thead>
<tr>
<th>Questions</th>
<th>Respondents (46)</th>
<th>Responses</th>
</tr>
</thead>
<tbody>
<tr>
<td>TO WHAT EXTENT</td>
<td></td>
<td>Very much</td>
</tr>
<tr>
<td>1) did it help you develop</td>
<td>No. %</td>
<td>No %</td>
</tr>
<tr>
<td>a) responsibility for learning?</td>
<td>44 95,7</td>
<td>23 50</td>
</tr>
<tr>
<td>b) confidence in abilities?</td>
<td>46 100</td>
<td>22 47,8</td>
</tr>
</tbody>
</table>
Although two respondents failed to answer the first question, the general response confirmed our observation that students had risen to the demands of this teaching and learning approach, so different from their previous experience. Their explanations to the first question supported this impression. The following quotations represent the views of thirteen students, as indicated in brackets:

- *I learned self-discipline* (5);
- *I learned to ask for help* (3);
- *it helped me become independent* (3);
- *I learned to be accountable for my chosen course of action and knew I was entitled to my own opinions* (2).

Support for the view that our students could be considered to have developed a self-directed capacity came unsolicited from two sources. First, in a faculty board discussion about the generally poor culture of learning, particularly amongst first-year students, the Dean used our group as an example of students who demonstrated more learner autonomy than the norm (Lumby, 1997). Second, in 2001 an adviser and consultant to the South African Institute of Chartered Accountants (SAICA) and Professional Accountants and Auditors Board (PAAB), with a particular brief to develop black African chartered accountants, expressed a view that strengthened the above indicators. After visiting all leading South African universities offering Accounting Honours courses, she described our students (then in their Honours year) as more responsive and insightful in discussions about teaching and learning, displaying a degree of autonomy she had not seen in other students (Faller, 2001).

Indeed her comment strengthens the data below, through which we explore the students' metacognitive capacities that we sought to develop through the course.
Metacognition

We sought to thread through the course an awareness of learning processes or course consciousness. We thereby aimed to promote students' ownership of their learning and performance through reflection on what they were doing in class and why and what could be more helpful, both in relation to specific tasks and the whole teaching and learning experience. This reflected our view, supported by Taylor and Burgess (1997:113), that it was important to help students "make sense of their personal educational history, the new form of learning they are experiencing and their own reaction to it". We considered this essential in view of the chasm we sought to help them step across.

Ryan (1997:129) captured this aim as follows: "critical reflection helps students to develop awareness of their own thinking; and includes self-questioning activities such as 'How do we go about our (self-directed) learning?' 'Were we successful?' 'Are there alternative actions we should have taken?' and 'Against what standards/expectations did we measure our success?'" He compared it to Schön's (1987) 'reflection-on-action' and, drawing on Royer et al (1993) offered indicators of "skilled performers of these 'metacognitive' functions" as people "able to plan their activity, monitor the success or failure of their own activities, and alter behaviour in accordance with the monitoring activity" (Ryan, 1997:129).

Indicators of the course's effectiveness in promoting metacognition would include:

- students critically reflecting on the strengths and weaknesses of the curriculum;
- students expressing insights on teaching and learning processes and making suggestions for improvement;
- students adjusting their learning approaches according to new awareness.
The 'house-keeping' sessions and ongoing evaluation processes described in Chapter Three from page 135, engaged students iteratively in reflecting on the course and its aims and objectives, eliciting suggestions for improvement. Two suggestions for broad curriculum change were well argued, immediately implemented and maintained since. The first related to their taking an additional course (Statistics for Commerce) in the second semester, when we had planned this for the following year. The second was to benefit subsequent groups of students, arguing that they should read BIS from the first semester of the first year.

When we tried to engage students in open discussion on how students' learning on the course should be assessed, however, they offered very little comment, showed little interest in curriculum negotiation at this level and suggested we develop a proposal for their approval. It was subsequently accepted with brief discussion and a strong intimation that this was not students' area of responsibility (team meeting notes, 25 March; 7, 8 April). This suggests students were not interested in critically reflecting on general curriculum issues, where it would not impact on structural change, indicating a limit to their metacognitive function.

Chapter Five revealed both successes and difficulties in negotiating teaching and learning processes associated with managing the democratic classroom and included examples of insightful reflection on classroom processes. These included debates amongst students on when, how and why group discussions and informal 'study groups' worked for them (team meeting notes, 17 March; 8 April 1997).

More difficult to assess is the students' capacity to change their behaviour in response to their reflection. Their grades generally suggest appropriate learning processes were adopted and the team meeting notes record class and individual discussions on coping strategies and 'study skills' (5, 17, 25 March; 8, 29 April 1997). The notes also capture our concerns, however, about the reluctance of most students with weaker test results to discuss their
learning strategies with us, and indeed when they did, to self-assess. Such students repeatedly saw the answer to their problem as simply to "try to work harder" rather than to change their approaches, and often studied for very long hours, going short of sleep (8 April 1997). It thus indicated a tentative link between metacognitive facility, adjustment of learning approaches, self-confidence and achieving good grades, suggesting that for the most part the course had promoted this function in our students.

**Authentic Knowledge. Deeply Processed and Elaborated**

The course team aimed to promote authentic, personal knowledge in the sense of students being able to talk about new concepts in informal non-academic language, in relation to their own experience and prior knowledge and in terms of their common sense understandings as a basis for an in-depth theoretical knowledge. This refers to knowledge that is not just learned in a cognitive sense, but believed, or what Grundy (1987:126) described as "not just 'true' in a general sense, but "true for me". Drawing on Polanyi (1962) she argued that knowledge must be made personal in that the learner has "some personal commitment to the knowledge". Indeed, according to Barnett (1990:157) "personal understanding" was crucial to critical reflection. Similarly Ryan (1997:129) refers to Kolb's (1984) experiential learning cycle in terms of "establishing connections amongst concepts" related to current and past learning, in order to establish personal meaning in what is learned and thereby enrich understandings.

These experiential learning principles relate to Entwistle and Ramsden's (1983:195) conceptualisation of the 'deep approach' as "*internal* to the content of the article or problem, and to the knowledge, experience and interests of the learner". They associated it with an "expectation that the content will become a continuing part of the learner's cognitive structure", or that learners will make personal sense or understand the meaning of what they were learning and will achieve high scores when the knowledge is tested. They
contrast this to the 'surface approach' typifying our students' school experience, of impressing "alien material ... on the memory for a limited period" associating this with low test scores.

Coles (1997:315) argues, however, that deep processing is insufficient in that more success is achieved by "students who elaborate their knowledge — that is who see the interconnections and links between different knowledge areas". He claims such students "not only gain the highest scores in examinations which test that knowledge but are more able to retrieve and use in some novel situation the information they have learnt".

Indicators of students developing knowledge that was 'owned' or personal, authentic, deeply processed and elaborated would include:

- demonstrating a personal commitment to knowledge by linking new to current knowledge, arguing from a common-sense stance;
- demonstrating deep understanding of discipline-based knowledge;
- linking and applying theoretical knowledge to realistic, practical situations and developing own theories (which may or may not be the same as those taught);
- linking aspects of knowledge within and between the fields of accounting, economics and law to reach integrated decisions or understandings and make personal sense of them.

The team meeting notes of 5 March 1997 record our early concern that early attempts to defend a point of view had amounted to "a regurgitation of textbook facts". We noted that, despite the wealth of ideas students brought to debates, demonstrating the links they were making between their practical and theoretical knowledge, they fell back on old habits when they were required to formally defend a position. They record our determination to "give value to what the students already know" to encourage their application of meaning to what they were learning, to dispel the 'mystery' surrounding new knowledge and to boost their self-confidence.
The notes capture some observations relating to students having demonstrated capacities to integrate knowledge and relate it to practical, prior knowledge and realistic situations. On 12 March 1997 we noted students had linked new concepts to “real world understandings” with one student, for instance, supporting her argument with a reference to advertisements and other day to day realities. Students “picked up the connections between cash flow projections and marketing, worked out calculations” needed to reach a decision, with the ‘quicker’ students demonstrating their clear understanding as they explained it to others “in everyday language” (17 March 1997). They “were able to argue the merits of the financing options set out in a case in which complex figures and loan options had to be considered” (Hesketh and Ngubane, 1998:188) in order to reach a decision. We also noted students’ use of researched facts and personal knowledge in defending their positions in class interactions and report-back processes about economic issues and the definition of price equilibrium. Some students debated largely from their personal experience, while others supported their views with readings. On one occasion, students using their own common sense were able to 'shoot down' an argument based on accepted fact through critically examining an underpinning assumption (Hesketh and Ngubane, 1998).

To be specific, some students referred to the basic (text-book) neo-classical economics to argue that when buyers and sellers meet, demand is said to be equal to supply, and when an agreed price (acceptable to both parties) is reached, goods are sold. However, students speaking from experience argued that this did not mean buyers and sellers possess equal power. Most economists would probably agree and explain this phenomenon through Hirshleifer’s (1988) analysis of consumer surplus, not easily accessible to first-year students. However, the students developed an explanation that drew on their experience and understanding of power relationships in a society.

The students understood the factors of production and who controlled them. In this way, they could “in the process of learning, explain a real life
phenomenon, based on their experience, supported by facts and critically examined by their intellect. The mystification (surrounding 'expert' 'accepted' 'academic' knowledge) (was) dispelled before it (had) time to settle, and some basis for critical, autonomous thought about 'academic' knowledge may have been laid" (Hesketh and Ngubane, 1998:187).

At the same time, when starting to develop the business proposal students asked the kind of questions that showed they were relating the project to a hypothetical but realistic situation, the kind of questions that should be asked when actually starting a business (team meeting notes, 7 May 1997). Similarly the notes of 7 April 1997 record students having linked their arguments to both practical knowledge of a realistic context and theoretical knowledge. One student, for instance, linked the commonly understood concept of interest to an accounting principle learned in a recent lecture and gave valid “every-day” examples to substantiate what he was saying.

In addition, we judged the interactive process of developing a concept map effective in “pulling together” the concepts that had been raised through a scenario discussion, demonstrating the links between them (team meeting notes (12 March 1997). The facilitator’s questions worked as “scaffolding” in helping students make the connections to build a more holistic understanding and we noted a "pleasing ease with linking the concepts and with their abstract application (7 May 1997). There were thus several indicators that students were elaborating their knowledge. The students’ feedback provided further indication that the course had promoted knowledge elaboration. They widely perceived this to have occurred and recognised it as important to their learning. In a ‘housekeeping’ session (17 March 1997) the students all said they agreed with a student who said:

> whatever we learn in other courses can be applied in the case studies. We started off learning theory with no practical knowledge in accounting and the case studies made it real. They helped a lot. They create a demand for knowledge.
In the April group interviews, five groups (81% of students) specifically referred to the usefulness of the course in helping them see how theories, introduced in lectures, applied in practice and “helped us pass our tests”. Through all evaluation processes students confirmed this and the scenarios’ effectiveness when they reflected realistic, topical current South African socio-political and economic contexts and raised issues to which they could relate. The student mentors in January 1998 summed up their response to the analysis of their class’s October questionnaire by emphasising the course “helped us apply our knowledge to real life”. They noted that “other students don’t relate lecture material to real life”.

Students’ explanations to their answers to the June 1997 questionnaire’s general question about the appropriateness of the course ‘outcomes’ and the specific question about how students had coped with scenarios having no definitive answer, confirmed they had made links between different knowledge areas and this had enhanced learning. With paraphrasing where students made similar comments they include:

- *it helped me understand how what I learned in other courses was not just theory but applied in the real world and it made it more interesting (8);*
- *I learned how what I was learning applied to business (6);*
- *it made me see how important, useful and exciting the other courses were because I could see they related to the real world.*

The table below captures the responses of 46 of the class of 49 who responded to the June 1997 questionnaire, to questions about how their work on scenarios helped them understand each mainstream course; showed how they relate to one another; showed how theoretical concepts relate to the real world in each course; extended their understanding of concepts introduced in each course.
Table 7: Course impact on knowledge elaboration – student views

<table>
<thead>
<tr>
<th>Questions</th>
<th>Answers</th>
<th>Responses</th>
</tr>
</thead>
<tbody>
<tr>
<td>1. Helped understand courses in:</td>
<td>No. Total Positive 'Very much' 'quite a lot' 'not much' 'not at all'</td>
<td></td>
</tr>
<tr>
<td>Economics</td>
<td>46 36 78.3 11 23.9 25 54.3 10 21.7</td>
<td></td>
</tr>
<tr>
<td>Comm Law</td>
<td>46 31 67.4 4 8.7 27 58.7 14 30.4 1 2.2</td>
<td></td>
</tr>
<tr>
<td>Accounting</td>
<td>45 29 63.0 14 30.4 15 32.6 15 32.6 1 2.2</td>
<td></td>
</tr>
<tr>
<td>2. Showed how they relate to one another in practice</td>
<td>46 38 82.6 19 41.3 19 41.3 8 17.4</td>
<td></td>
</tr>
<tr>
<td>3. Showed how theory relates to the real world in:</td>
<td>Economics</td>
<td>46 40 86.9 15 32.6 25 54.3 6 13.0</td>
</tr>
<tr>
<td></td>
<td>Comm Law</td>
<td>46 40 86.9 17 37.1 23 50.0 5 10.9 1 2.2</td>
</tr>
<tr>
<td></td>
<td>Accounting</td>
<td>45 28 60.8 16 34.8 12 26.1 14 30.4 1 2.2</td>
</tr>
<tr>
<td>4. Extended conceptual understanding in:</td>
<td>Economics</td>
<td>44 34 73.9 12 26.1 22 47.8 10 21.7</td>
</tr>
<tr>
<td></td>
<td>Comm Law</td>
<td>45 29 63.0 6 13.0 23 50.0 16 34.8 1 2.2</td>
</tr>
<tr>
<td></td>
<td>Accounting</td>
<td>46 27 58.7 14 30.4 13 28.3 17 37.1 2 4.3</td>
</tr>
</tbody>
</table>

The responses suggest students felt most positive about the course having shown how the disciplines relate to one another, important after the comment from a student saying "I don't understand why we are learning law for a B Com" (team meeting notes, 17 March 1997). The responses also generally reinforce our concerns discussed in Chapter Five about the bias towards economics, but raise some interesting questions about accounting in our successes and failures in integrating it into our scenarios.

On the one hand, we observed students exploring wide-scale issues. These included how accounting (and legal) systems relate to market and command economic systems; how they reflect the interests of the people in power;
generally accepted accounting principles; what accounting reports are used for; and whether one accounting system should be applied to all economies around the world (team meeting notes, 10 March 1997). On the other hand, we experienced difficulties in integrating through scenarios, concepts arising through the Accounting course. The accounting-related perceptions above confirmed this ‘gap’ and reflected problems in addressing students’ concerns about the meanings and definitions of terms like “revenue recognition; reliance; going concern; historic costs; prudence; conservatism; consistency; entity concepts; depreciation” which they were “learning for a test”. When attempting to clarify concepts through a scenario to relate theoretical and practical knowledge, we found ourselves “confronted with the way accounting is taught … concepts being compartmentalised and definitions learnt in isolation from reality”. We observed that we would need to identify concepts essential to the accounting course and “thread these through the cases” in future (team meeting notes, 26 March 1997), indicating a ‘gap’ in terms of our aim to develop scenarios applicable to all three fields of knowledge.

One aspect to this problem was that this first semester accounting course had been conceptualised as an introductory course, close to book-keeping, for the sake of those students who had not taken accounting at school. It was acknowledged to be unchallenging for those who had (Hayden, 1996). (This is illustrated in the high level 1 Accounting grades, relative to other courses in Table 7 on page 245 above). It had therefore not been a major focus within our course. Indeed the positive accounting-related responses were probably a recognition of the small focus we gave to applying accounting principles in the face of the mainstream course’s lack of concept contextualisation and application. It begs some important questions in relation to the level two and three courses based in the Department of Accounting and Finance, including BIS, with which our students struggled along with all other students. They relate to the need for critical thinking in these courses, in the context of subsequent developments and are raised in the Conclusion to Part Two to inform Part Three’s reflections. However, the above indicators suggest that
the course had promoted both deep processing and elaboration of knowledge that were assumed to have influenced 'our' students' relatively high grades.

Another strong indicator came from tutors and lecturers who endorsed this view. They regularly expressed their enjoyment of teaching 'our' students because of the interest they showed. Moreover Economics and Law lecturers commented particularly on the quality of questions students asked during and after lectures, and during tutorials, that demonstrated autonomy in the way they were thinking about 'academic' knowledge. They said this contrasted with what they had come to expect as 'normal' student attitudes to learning. Comparisons were drawn with students who appeared to think their role as learners involved passively waiting for knowledge to be transferred, whose questions related to how much and what they had to learn, and who appeared to liken educational processes to a 'production line' (Saville, 1998).

In contrast they noted 'our' students' willingness to offer opinions and debate issues in the mainstream tutorials, drawing on personal understandings, when 'other' students, particularly black Africans, were either reluctant or refused to be drawn into discussion (team meeting notes, 6 May 1997; tutor development meeting, February 1998). This confirms student perceptions about their personal empowerment, discussed in Chapter Five, and reflects the socio-political context in which we implemented the course, recalling our emancipatory interest and concern for developing critically reflective attitudes and approaches to knowledge as discussed below.

Criticality

This section reflects on the course's effectiveness in achieving the remaining objectives, related to our 'political' interest and 'radical constructivist' approach to teaching and learning. The Student Development Model on page 164 illustrates how the deep processing and elaboration of knowledge required by effective, critically reflective students, life-long learners (and thinking citizens),
was perceived to be dependent on students’ development of criticality. This relationship is explored below, in terms of the extent to which the course was able to promote intellectual growth, the third ‘leg’ of the course, to support personal and academic growth, in order for all three legs to interdependently achieve the above overarching course aim.

‘Criticality’ refers to critically reflective processes and attitudes that extend from both the ‘reflection’ and ‘critical thought’ associated with problem-solving in the PBL literature, and relate to our ‘political’ curriculum aims. It involves an interest in problematising situations, seeing “what is questionable” (Grundy, 1987:91) in the process of ‘solving problems’, adopting a sceptical attitude towards, and examining assumptions underpinning, ‘accepted’, ‘dominant’ or ‘common-sense’ knowledge. A critical approach thus includes recognising the power / knowledge relationship and the influence, inter alia, of race and class on knowledge be it ‘academic’, ‘social’ or ‘cultural’, and valuing multiple perspectives in knowledge constructing processes. ‘Problematising’ or ‘problem-posing’ thus refers to the “kind of questioning that may jolt individuals out of their immersion and make them reach towards the fringes of what they think they know” (Greene 1974:75), making meanings “richer and more perceptible” (Greene 1974:74) thereby enhancing learning.

The problem-posing approach relates to the social consciousness we sought to promote or the “wide-awakeness” resulting from “making the familiar strange and the strange familiar” (Schubert, 1986:179, drawing on Greene) to “move beyond the domestic and oppressive” (Greene, 1974:82). It involves recognising knowledge as value-laden, contestable, conditioned by historical and social contexts, and demands a moral orientation (Mason, 2000) and a social rather than individual perspective (Reynolds, 1999). While recognising the uncertainty of knowledge a student is required to commit to an idea and take a stand, but at the same time to be self-reflective, adopting a tentative and self-critical attitude, “look(ing) continually over his or her shoulder and ask(ing) critical questions of his or her own position” (Barnett, 1990:171).
Although it goes beyond the scope of this case study, our aim reflected an interest in promoting what Barnett (1990:120) called a life of reason or rationality where “students will go on examining their own beliefs, thoughts, values and practices, and will make connections between those intellectual activities and their wider life and their general values ...” as life-long learners and concerned citizens. This relates to Delors’ (1996:94) argument for continually providing learners “with the powers and intellectual reference points they need for understanding the world around them and behaving responsibly and fairly”.

This socio-political aspect of the curriculum embraced our perceived need, argued in Chapter Two to empower students, inter alia, to recognise and resist both ‘old’ hegemony and ‘new’ threats to our open, democratic, socially just society. Through the scenario content we aimed to catalyse business-related debate around issues of social justice and democracy that complemented students’ experience of a relatively democratic, egalitarian curriculum discussed in Chapter Five and promoted the above kind of criticality.

The course strengths and shortcomings in relation to these aims and objectives are clearly difficult to assess but the section below discusses indicators in terms of the following characteristics associated with a critically reflective student:

- debates incorporate personal values and social, ethical considerations;
- decisions involve critical evaluation of facts and ideas, weighing up diverse viewpoints, examining assumptions underpinning ‘accepted’ knowledge;
- communication demonstrates self-reflectiveness and an acceptance of the “tentativeness of what is held to be true at any particular time” (Fleury 1998:172, drawing on Bronowski, 1965).

Course content was selected and teaching and learning processes were designed to interdependently promote these critical characteristics in our
learners. Content, discussed on page 170 in Chapter Four, is illustrated in the two examples of scenarios in Appendices 12 and 13. The teaching and learning processes, discussed on pages 175 and 194, in relation to course plans and their implementation, are illustrated through the two related excerpts from the Facilitator’s Manual (Appendices 14 and 15).

The team meeting notes record some indications that the course had promoted criticality, encouraging free thought. For instance, when students asked if the ‘Sizwe Industries’ scenario (Appendix 13) could be used as a basis for helping them prepare for a Commercial Law test, the facilitator applied a legal focus to the session (team meeting notes, 24 March 1997). He used the questions around the content to help students apply their theoretical knowledge and to think for themselves about how specific legal principles could be applied to this realistic context. We observed students grappling interactively with the following questions, designed to help them form opinions and integrate legal concepts in their personal understandings. To demonstrate, the following questions were used:

1. Who are the legal entities and why do you say so? What qualifies them to be considered legal entities and why?
2. What is the legal relationship between Mr Sinclair, Top National Bank (TNB) and Sizwe Industries? What is the legal use of agents?
3. If TNB were to make an offer to Sizwe Industries, what would such an offer be? What conditions should exist for the contract to be binding?
4. How binding is the relationship between Woza Nawe and Sizwe Industries? How can it be made watertight? (What conditions should be built into the contract?)
5. What is the relationship between the community and the RDP? Is it a legal relationship? Give reasons for your answer.
6. A basic tenet of law is intention. Give the basic parameters of Mr Sinclair’s intention.
7. Look at all the role players in the case and consider their legal standing.
It has been argued above that interactive decision-making processes enhanced students' learning. The team meeting notes (24 March 1997) record that the team judged this a successful session (though we reconsidered this later, when some students complained that the course should not shift direction for the sake of students ill-prepared for their test). At the same time the facilitator felt he had used the session to lay a foundation for critical reflection and problem-posing around the scenario for a future focus when it would incorporate issues of social justice. The scenario would then be used to promote students' consideration and articulation of personal value systems, social, ethical and cultural interests and their sense of 'ubuntu'.

The team meeting notes (7 April 1997) indicate students struggled to resolve the 'Sizwe Industries' issues. We referred to the scenario later as a "living document" because both staff and students referred back to both content and process throughout the course (team meeting notes, 29 July 1997). Indeed the students referred to it in the 1999 meeting and thereafter as graduates they have unerringly recalled the experience with a smile and a comment about its impact in their first year, indicating it was a memorable experience. From that it can be extrapolated that some seeds were planted in the minds of these businessmen and women, whatever they choose as their guiding principles in the future.

The team observed openness to different perspectives in the face of its complexity (team meeting notes, 7 April 1997). Students listened to one another, argued persuasively, and in many instances shifted their arguments to incorporate different views until they felt they had reached the most integrated decision they could. They thereby demonstrated a willingness to learn from one another, to recognise their understandings as 'tentative' in the face of personal values and complex realities. While it is difficult to suggest what this indicated in terms of students' social values, it can be extrapolated that there was an 'other-centredness' underpinning much of the discussion.
There were also heated debates starting with the ‘brain-storming’ of diverse personal opinions that gave no clear idea of the decision students would ultimately reach. In the process of weighing up the various views, listening to arguments and counter-arguments students developed very strong feelings about what was right and wrong. A wide variety of perspectives were brought to bear on the debate, which ended with students having to make a choice between advising a business decision that prioritised development of the local disadvantaged community and one that was protective of the bank’s interests.

One-third of the class defended the right of business to pursue the business of business, arguing it was unethical to put the bank at risk because of the domino effect this would have on society (from shareholders to local community). On the other hand the majority of students felt it was unethical to stand in the way of development opportunities for local communities in view of the country’s socio-political history, the promises made by the new government, and the bank’s advertising itself as a ‘pro-development’ institution. One student refused to take either side arguing fiercely that there had to be another solution that was socially uplifting and moral without risking the bank’s sustainability.

During this debate some students changed their minds, being persuaded by the opposite group and explaining why. They thereby demonstrated their ongoing critical evaluation of the ideas as they emerged and their ongoing assessment of the stand they would take, and the complexity of the situation for a newly qualified black businessperson straddling two social worlds, each with its own demands. It involved reflection on the situation in relation to the political history with students debating legal nuances in relation to “ethics in law” concerning criminal records earned from non-compliance with immoral apartheid laws (team meeting notes, 7 April 1997). These were the kind of complexities that had to be weighed in arriving at a ‘business’ decision, reflecting the responsibilities of decision-makers in our context.
In our deliberations over the effectiveness of the scenario and the session, we noted the “fun” students had in exploring these ideas, their tolerance for, and accommodation of different views in their attempt to meet consensus, and their subsequent agreement to disagree. We also noted a conservatism and ‘apolitical’ stance in many students, an unawareness of, and disinterest in, the political realities that had confronted their parents and communities just a few years previously, as they entered their teenage years. While this indicated a normalising society it also pointed to the need for “wide-awareness”, discussed above, in relation to Chapter Two’s argument for nurturing our democracy, treasuring our constitution and reflecting on the dominating culture of individualism.

It was difficult to assess the extent to which we were in fact witnessing the critically evaluative processes and social awareness that we aimed to achieve through the course, and impossible for all students. However, the above suggests students were being reflexive, thinking independently, exchanging and reviewing ideas, verbalising and applying personal values to decision-making processes in ways they were not free to do in other courses.

Similarly ‘The Irony of Capital’ (Appendix 12) raised questions about our past and current government; power between the ‘West’ and African countries, the argument that “capitalism devalued the traditional way of life”; greed associated with individualism and competitiveness. It required students to examine the assumptions underpinning the different schools of economic thought, asserting that “economic scholars have to be critical of any system and adopt that system that best serves their (country’s) interest”. The debates showed they were reflecting on why the various systems existed and were wrestling with their own ideas as they developed their own theories (team meeting notes, 10 March 1997). At this early stage of the course, however, students appealed for an ‘answer’ from the facilitator, demonstrating their initial discomfort, and some frustration, with relating to knowledge in this way.
In evaluating the scenario (25 May 1997) one student's comment suggested it had involved the kind of problem-posing we intended. He or she said:

*It gave us the ability to observe different opinions on the same subject, but at the same time leaving us with a question mark on some of the details included ie communism. This gave more incentive to find more on the information that we feel we need to be filled with.*

This was supported by the view expressed by a student in the group interviews (April 1997) and endorsed by his or her group-members that:

*statements are true only to a certain extent*

and that:

*one has to make sure of the limits and to what extent it is true.*

Aside from the widespread comment that it made students think about how theory could be applied to practical, realistic situations, comments included:

- *(the scenario) does not decide for us. We have to decide by ourselves*
- *It looked at both sides of the story and at both the good points and the bad points;*
- *I always learn new ideas from fellow students;*
- *it was a learning experience, it brought up issues that happen on daily basis and part of life;*
- *it help us to see how rational we can think.*

In the June questionnaire to which forty-six of the forty-nine students responded, the responses indicated strongly that the course had helped them develop a new relation to knowledge. They were asked 1) how much the course helped them a) see there are different ways of looking at a problem, b) there are often no obvious 'right' answers to realistic problems and c) they
should defend their views with facts d) develop an ability to think critically; 2a) to what extent they felt the cases allowed them the freedom to draw their own conclusions; 2b) how important this was to them. Their responses are tabulated below.

Table 8: Course impact on developing new relation to knowledge – student views

<table>
<thead>
<tr>
<th>Questions</th>
<th>Answers</th>
<th>Responses</th>
</tr>
</thead>
<tbody>
<tr>
<td>1. How much the course helped you:</td>
<td>No.</td>
<td>Total Positive</td>
</tr>
<tr>
<td>a) see there are different ways of viewing a problem</td>
<td>45</td>
<td>44</td>
</tr>
<tr>
<td>b) see realistic problems often have no obvious 'right' answers</td>
<td>45</td>
<td>39</td>
</tr>
<tr>
<td>c) see you should defend views with facts</td>
<td>45</td>
<td>44</td>
</tr>
<tr>
<td>d) develop ability to think critically</td>
<td>43</td>
<td>38</td>
</tr>
<tr>
<td>2a) To what extent did cases allow you the freedom to draw your own conclusions?</td>
<td>46</td>
<td>37</td>
</tr>
<tr>
<td>2b) How important was it that you could?</td>
<td>46</td>
<td>44</td>
</tr>
</tbody>
</table>

Nine students gave no explanations to 2a and 2b), but the rest of the class with some paraphrasing where answers were similar, said:

- it makes you confident to make decisions (10);
- to draw conclusions one just needs reasoning; I learned to use logic and back up my ideas (7);
- it helped identify my own way of thinking, style and ability, formulate my own opinion (6);
it’s important as I don’t merely want to go with the opinion of others;
My conclusion tells me to what extent I have understood, I realised how much I knew, having a conclusion ties up loose ends (4);
Being able to draw conclusions helped me understand the material;
I had to consider everyone’s opinion, digest everything said, compare it with mine and compromise (4);
Everyone wants their own opinion heard;
Gave me a chance to put my skills into practice and see how they fit in a real world situation (2);
Develops fluency in communication.

There were thus some strong indications that students had recognised knowledge as uncertain, value-laden and power-related, had connected business decisions with an awareness of social issues relevant to our context, problematising the situations and tasks and examining their underpinning assumptions. Moreover there are clear indicators that students linked this new relation to knowledge with understanding the mainstream courses of Economics, Commercial Law and Accounting.

Table 8 on page 255 above, however, shows that by the end of the course six students (13.0%) indicated that they had not been helped much to think critically; eight (17.4%) that the cases gave them ‘not much’ freedom to draw their own conclusions; and fifteen students (32.6%) still said it was frustrating to find there was no single ‘right’ solution to problems. The data hence reveal a number of students felt the course had not achieved related objectives, indicating the course had not ‘reached’ them, pointing to focus areas for future implementation in the Introduction to Part Three and Chapter Eight.
Conclusion

Despite the problems of drawing conclusions from a single case study of this nature, the chapter has provided indications that the course’s aims and objectives were largely achieved. The students generally attained very good grades relative to other students, and most students strongly indicated a link between their academic knowledge and ability and what they had learned and experienced through the course. In view of the problems in simply believing student feedback there were a number of checks on these data and there were strong indicators (discussed in Chapter Five) that students were unafraid to give honest, negative responses.

In seeking answers to the question of the course’s effectiveness as a tool for enhancing learning, we have considered how the curriculum’s capacity to personally empower students and to induce criticality was integral to its affect on learning outcomes. We have noted in the Introduction and Chapters Two and Four, that the team had termed their approach ‘PBL’. Having seen from the last three chapters that their interests went beyond the problem-solving skills associated with the method studied, we are now in a position to review the PBL literature critically. We will do so in the light of the curriculum described and evaluated in the last three chapters.
CHAPTER SEVEN

PBL LITERATURE – AN ANALYTICAL OVERVIEW

Locating the literature chapter here, at the end of the case study, rather than in its more traditional earlier position in a thesis, signifies the reality of having hastily planned and implemented the course before it could be grounded in deep reading. The chapter's situation conveys the fact that when I began to conceptualise the evaluation in terms of a case study research project, the need to locate the curriculum concerns in a framework of learning theory became clear. I surveyed the PBL literature, assuming it would legitimate and illuminate the findings about what had made the course effective, and thereby help me answer the research question asking whether learning opportunities could affect our students’ outcomes.

Having looked at the learning conditions that the course provided, in the light of the course team's assumption that the term 'PBL' represented the teaching and learning approach, we can now explore the PBL literature in relation to the practice described and evaluated in the last three chapters. To this end I want to provide, first, an overview of the literature and second, a critique of PBL in terms of its 'Western' orientation and instrumental, individualist interests, through which I want to indicate a wider literature in experiential learning which would have better framed our practice. We will do this in two main sections, with three subsections that represent the three central course interests. They are:

- Literature overview.
  - PBL for knowledge, skills and competencies.
- Literature critique.
  - PBL for criticality and social awareness.
  - PBL for personal empowerment.
The overview of PBL literature demonstrates its synergy with one aspect of the course aims: academic growth, which includes interest in developing knowledge, skills and competencies for academe, for life generally and work. The critique through which we explore the literature in relation to the other two course aspects: criticality and personal empowerment, incorporates the concern that students engage with issues of social justice and democracy, and develop a deep sense of self-confidence, self-worth and African identity. In this way we will see PBL’s shortcomings in terms of the curriculum discussed in the previous three chapters and therefore the inadequacy of the PBL theoretical framework for the full range of learning opportunities offered. We will see that for the whole course purpose the literature was too ‘Western’ in orientation.

The course team had understood PBL to be a progressive methodology that could help the students make the required transition from restrictive backgrounds to successful university studies. The ‘problems’ would provide topical, interesting, hypothetical scenarios representing several realistic South African business situations that raised pertinent issues (as in Appendix 13) and one theoretical scenario with strong links to South African realities (as in Appendix 12). Based on joint experience and understandings of curriculum theory, the team believed that the students would learn theoretical knowledge better if they could see how it related to practical knowledge and their life experiences. Thus PBL had seemed to be a sensible vehicle for meeting the learners’ needs.

At the same time the method had appeared to provide a means of confronting students with ‘problems’ that were controversial, having no one ‘correct’ answer and to frame problem-solving tasks, involving interactive knowledge-constructing processes that would demonstrate the subjective, contestable nature of knowledge. Furthermore, since students’ previous educational experience was limited to teacher-centred classrooms and knowledge transmission, as discussed on page 37, PBL had seemed to offer a means of promoting independent thought. From practical knowledge of PBL, the team had thought we could use the method to achieve the course aims. It also had
the advantage of representing an educational approach that was considered to be a sound, practical, progressive approach by sponsors, some of whom had experienced PBL through Business School education, and by academic colleagues in Management Studies.

PBL literature Overview

The literature overview reveals widespread successes of PBL practices in achieving the first set of course objectives and broad enthusiasm for the approach as a progressive pedagogy.

PBL for Knowledge, Skills and Competencies

This section reflects the bulk of the PBL literature in relation to its historical roots and purposes and its prime concern for developing knowledge, skills and attributes for the workplace. It demonstrates that PBL has had a pragmatic, work-based orientation, used to bring the realities of the various professions into the classroom, in answer to the criticisms about traditional professional education, to better prepare learners for the demands of work. Its orientation has thus been ‘Western’, individualistic and instrumentalist, reflecting the interests of the professions and the ‘Western’ notion of the world of work. The above PBL interests are considered below in terms of how the method has been conceptualised; its historical roots; common aims and objectives.

How PBL has been conceptualised

Barrows and Tamblyn (1980:1) defined PBL as “the learning that results from the process of working toward the understanding or resolution of a problem”. The problem is “encountered first in the learning process” to stimulate active learning, rather than as a knowledge application exercise after learning a set
of facts or principles. Wilkerson and Feletti (1980:53) similarly argued "the crucial components are that the problems raise compelling issues for new learning and that students have an opportunity to become actively engaged in the discussion of these issues, with appropriate feedback and corrective assistance from faculty members".

Indeed in a critically reflective book on PBL (Boud and Feletti, 1997), Boud's 1985 quote was used to introduce the topic, showing the sound foundation of the early work based on Dewey's ideas on interest-based curricula and discovery learning. He said: "the principal idea behind problem-based learning is ... that the starting point for learning should be a problem, a query or a puzzle that the learner wishes to solve" (Boud and Feletti, 1997:1).

From Maastricht, Gijselaers (1996:13) drew on concepts from cognitive psychology to explain the potential of PBL, saying it "derives from the theory that learning is a process in which the learner actively constructs knowledge" and instruction is only useful insofar as it promotes constructive rather than receptive activities. He thus explicitly reflects Bruner's constructivist ideas of learning captured by Boud and Feletti (1997:126, after Kearsley, 1996: Constructivist Theory) as "an active process in which learners construct new ideas or concepts based upon their current / past knowledge".

Based on his work at McMaster University, Barrows (1996:5-6) extended the above definitions to describe PBL as "student-centred" with learning occurring in "small student groups"; where "teachers are facilitators or guides"; "problems form the organising focus and stimulus for learning" and the vehicle for developing professional (clinical in his case) problem-solving skills; in situations where "new information is acquired through self-directed learning". In his medical education context he judges that a PBL curriculum can achieve the following three educational objectives: "the acquisition of an integrated knowledge base", structured around "the cues" presented by realistic situations; the "enmesh(ing)" of these with effective and efficient problem-solving processes; and "the development of effective self-directed learning skills" and "team skills" (Barrows, 1996:7).
While the above conceptualisations reflected our shared interest in developing a progressive pedagogy to enhance learning, they were underpinned by an interest in promoting effective practitioners in various professions, contrasting with our primary purpose of developing first-year learners from poor schooling backgrounds as effective learners.

**PBL's historical roots**

PBL can be traced back to Socrates' use of dialogue and Dewey's interest in facilitative, progressive learning and teaching. His problem-solving approach made learners' experience central to learning, relating 'problems' or practical scenarios to ordinary life experience and requiring learners to test their problem-solving hypotheses against their personal experience. It was applicable to learners of any age or maturity with any level of experience (Dewey 1915; Jarvis 1988; Nagel, 1996).

Dewey's approach meant the "first stage of contact with any new material ... must inevitably be of the trial and error sort" with something to do rather than to learn, where the doing demands "thinking, or the intentional noting of connections" resulting in learning (Dewey, 1915:10).

Having been successfully used in law schools like Harvard in about 1900 (Carter, 1994; Hartman, 1992), for their purpose, PBL was adapted to schools for other professions notably medicine and business. The Harvard Business School's 1908 mission was to provide a practical, professional training for graduate students, promoting a "pedagogy that linked the classroom to the actualities of business and engaged the MBA student in a practice-oriented, problem-solving instructional mode" (Barnes et al, 1994).

PBL reappeared in the 1960s heavily influenced by Jean Piaget's cognitive development theories, Jerome Bruner's notions of constructivism and Rogers' Socratic ideas of self-discovery. Medical education featured strongly in the
literature. Barrows (1996) and Aspy et al. (1993) traced the development of the medical school case model or PBL from McMaster in Canada in the late 1960s. According to Barrows (1996) PBL was a response to what Spaulding (at McMaster) described as a need for a more innovative approach, to overcome students’ disenchantment and boredom with their medical education. “Students were ... saturated by the vast amounts of information they had to absorb, much of which was perceived to have little relevance to medical practice” (Barrows, 1996:4). Indeed, Barrows referred to his similar experience where it seemed that “conventional methods of teaching probably inhibit, if not destroy, any clinical reasoning ability” (Barrows and Bennett, 1972). Aspy et al (1993:22) similarly referred to McMaster’s desire to provide a more active role for its learners and a less stressful educational experience for first- and second-year students.

The McMaster experience stimulated the development of PBL in institutions like Maastricht in the Netherlands in the 1970s (Bradbeer, 1996; Barrows, 1996), Newcastle, Australia (Barrows, 1996) and New Mexico (Aspy et al, 1993). It then spread to about sixty medical schools around the world (Bradbeer, 1996). By the 1980s, Harvard’s School of Medicine developed partially problem-based curricula and engaged in a long-term research effort on the dynamics of the method (Wilkerson and Feletti, 1989:52). Staff focused on developing student autonomy and on “altering attitudes rather than filling them with facts” (Aspy et al, 1993). Later the University of Hawaii converted the entire curriculum to PBL, an initiative followed by Harvard, the University of Sherbrooke in Canada (Barrows, 1996) and others. By the late 1990s many medical schools were developing their own variations of PBL, in specific courses, as alternative or as entire curricula (Barrows, 1996).

Recently PBL has been increasingly applied to other professional fields like engineering, law, social work, and of particular interest here, business studies. Clearly PBL was considered particularly useful for work-based education and the preparation of professionals for work. The Harvard Business School used seminars to promote a case method approach in 1968 and progressively developed and refined the approach (Barnes et al, 1994). By the 1970s
others like Maastricht followed (Gijselaers, 1995) and in the 1980s integrated, problem-based curricula became more widespread. This was a response to criticism of graduate business education as “too theoretical and out of touch with business realities, (and) for producing narrow-minded technicians without interpersonal and communication skills…” Stinson and Milter, 1996:34).

According to Bligh (1995) PBL was not implemented in medical teaching in Britain until the 1990s, when it was implemented also in medical schools of South African Universities like the Universities of Natal, Witwatersrand and Transkei (Mhlauli, 1998). South Africa has also seen PBL implemented in isolated courses in some universities like, for instance: the Orange Free State’s nursing department (Fichardt, 1996; Johannes, 1996), Cape Town’s accounting department and Graduate School of Business (Paxton, 1998; Wyllie-Sayed and Bond, 1997); Natal’s School of Architecture (unpublished).

PBL was thus mostly offered to post-first-year students, usually postgraduate or senior undergraduate students assumed to have at least basic and mostly extensive relevant discipline-specific prior knowledge. Although little theoretical knowledge was assumed in our first-year students, our aims and objectives around helping students develop appropriate knowledge, skills and competencies were well represented in the literature.

**Common aims and objectives in PBL literature**

The literature was useful for what could be learned from a wide range of PBL application and experience relevant to our aim of developing effective learners and enhancing learning through realistic problem-solving situations. It was widely used to:

- promote knowledge acquisition and application of an appropriate, well-structured, integrated, or essential body of knowledge (Aspy et al, 1993; Barnes et al, 1994; Barrows, 1996; Birch, 1986; Boyce, 1993; Bradbeer, 1996; Chaharbaghi and Cox, 1995; Christensen, 1993; Duffield and
Grabinger, 1997; Grosse, 1985; Pincus, 1995; Schug and Cross, 1996; Sobral, 1995; Thomchick, 1997);

- develop evaluation, judgement, decision-making or problem-solving skills (Barrows, 1996; Barrows and Tamblyn, 1980; Boyce, 1993; Chaharbaghi and Cox, 1995; Elman and Lynton, 1985; Gantt, 1996; Grosse, 1985; Hartman, 1992; Jost et al, 1997; Lang, 1991; Pincus, 1995; Wilkerson and Feletti, 1989; Woods, 1996);

- develop analytical, critical reasoning, or general mental abilities (Alien and Rooney, 1998; Barrows and Tamblyn, 1980; Birch, 1986; Boyce, 1993; Bradbeer, 1996; Carter et al, 1994; Dunlap, 1996; Faulkenburg, 1991; Gantt, 1996; Hartman, 1992; Jost et al, 1997; Muth et al, 1994; Pincus, 1995; Schug and Cross, 1996; Stapleton and Stapleton, 1998; Thomchick, 1997; Wassermann, 1993);

- develop capacities to recognise gaps in evidence, ask pertinent questions, identify and use appropriate information resources Bligh, 1986; Bradbeer, 1996; Gantt, 1996; Jost et al, 1997; Kneale, 1999; Muth et al, 1994; Pincus, 1995; Stinson and Milter, 1996; Wilkerson and Feletti, 1989;

- enhance the linking of new to prior knowledge and to later recall knowledge (Allen et al, 1996; Barrows, 1996; Bradbeer, 1996; Carter et al, 1994; Chaharbaghi and Cox, 1995; Christensen, 1991; Lang, 1987; Schug and Cross, 1996);

- develop independent, self-directed, active, involved or motivated learners, with lifelong learning attitudes and approaches (Allen and Rooney, 1998; Allen et al, 1996; Aspey et al, 1993; Barrows, 1996; Barrows and Tamblyn, 1980; Birch, 1986; Bligh, 1996; Bradbeer, 1996; Chaharbaghi and Cox, 1995; Dunlap, 1997; Gijselaers, 1996; Grosse, 1985; Jost et al, 1997; Kolmos, 1996; Lang, 1991; Muth et al, 1994; Nyamapfene and Letseka, 1995; Pincus, 1995; Sobral, 1995; Stevens and Wilkins, 1995; Stinson and Milter, 1996; Thomchick, 1997; Van de Vleuten et al, 1996; Waterman, 1997; Wilkerson and Feletti, 1989);

- develop collaborative, team skills (Allen and Rooney, 1998; Barrows, 1996; Chaharbaghi and Cox, 1995; Elman and Lynton, 1985; Gantt,
Findings in the literature were overwhelmingly positive and enthusiastic about PBL as an innovative pedagogy and a great improvement on traditional professional education. This confirmed the course team's sense of PBL and what could be achieved through it when we decided to organise the course around PBL through practical scenarios. Our broad understanding was that PBL through realistic, relevant content material would help students see the links between theoretical and practical knowledge and amongst the various business-related knowledge fields and disciplines of Accounting, Economics and Commercial Law. We thought the course would thereby help students make sense of the theoretical knowledge they were learning concurrently in the lectures along with all the other level one students. At the same time we recognised its potential through small group, interactive learning to promote confidence in problem-solving and other skills needed by a competent learner, including communication in English. Thus the above general understandings of PBL informed the design and implementation of the course.

The PBL literature overview, however, revealed very little reference to learning theory and it was nearly entirely practice-related and therefore contextualised, raising problems of generalisability, particularly in view of the contradictory findings that emerged, an issue for this study addressed in Chapter Ten. Useful here, though, were warnings of potential difficulties with PBL that focused my attention on specific aspects of the data I had gathered and was continuing to gather. On the other hand reported successes informed further questions about PBL's strengths in the study's context.

Important in view of our students' teacher-centred, knowledge-transmission schooling background was Aspy et al's (1993) finding in medical schools of McMaster, New Mexico and Harvard, that PBL students were not only more
independent learners but better able to elaborate knowledge, transferring learning from one situation to another, and integrating theory with practice. This was balanced, however, with a warning from Carter et al (1994:91) that even postgraduate PBL business students still tended to compartmentalise concepts and struggled to integrate recommendations, highlighting a focus of interest in the study.

According to Bligh (1995), however, Norman and Schmidt, from McMaster and Maastricht echoed Harvard's findings that PBL students reflected more on their learning, memorised less and preferred active learning. Woods (1996:95-7), similarly, found students showed more confidence with their problem-solving skills, more positive attitudes towards "lifetime learning" including "self-directed learning and open-ended problem-solving". Furthermore he found PBL courses improved marks in traditional courses in chemical engineering at McMaster University.

Despite wide claims for PBL developing problem-solving skills, Bligh (1995) cautioned that there was no proof as yet of a causal relationship between the two. He said the findings indicated no more than that PBL students may show better problem-solving skills than those on a traditional course, a view echoed by Barrows' (1996:10) summary of findings from the wide evaluative studies of Albanese and Mitchell (1993) and Vernon and Blake (1993).

Of special interest to this study were the few South African experiences with students from schooling systems similar to our learners'. Relevant here was Mammen's (1996:177) finding that the transformation from traditional teaching to PBL was difficult but that students ultimately considered it a good experience to take "charge of their own learning" (Mammen, 1996:) and had improved interpersonal skills, reflecting two of our course objectives.

In our context of ESL students with limited writing skills, Allen and Rooney's (1998:4) finding that upper-level business communication students in PBL courses produced more thorough and well-developed reports than those in traditionally taught classes with data more comprehensive and justifications
for decisions more persuasive. They attributed this (for mixed and ESL classes) to "the students' motivation to work on problems that (were) realistic case studies linked to their business interests".

In similar vein, Pincus (1995:97) found an increase in "intellectual aggressiveness" in students, and improved group and communication skills, while employers of her accounting students reported greater awareness of business issues. Demonstrating the overlapping of our aims with those of professional educators Barnes et al (1994) supported Stinson's (1990) finding that students developed desirable managerial capabilities. They claimed the approach, when successful, "produces a manager, grounded in theory and abstract knowledge and, more important, able to apply those elements" (Barnes et al, 1994:49).

Likewise Hmelo et al (1994) found PBL medical students' learning and reasoning ability improved significantly. This was demonstrated through more coherent explanations for their solutions than those of the traditional group. Similarly Doucet's (1997) work with PBL graduate medical students showed a significant improvement in clinical decision-making. Important to this study's questions about PBL's effect on first-year students, this could not simply be attributed to their maturity according to a number of practitioners. Guerrero (1996), working outside the professional education framework in the context of high school biology education, found that PBL students presented better solutions to problems than did those on the traditional curriculum. Kleinfeld (1991) also found case methods helped introductory student teachers identify issues in a problem; to provide more sophisticated analyses of educational dilemmas, and were better able to identify alternative responses than students on the traditional curriculum.

Bayard (1995) found, moreover, that undergraduate (dietetic) students at Wisconsin University thought they had engaged in less rote-learning and more reflective thinking, despite worries about learning content adequately through PBL. Similarly, Deretchin found in her comparative study at the University of Houston that traditionally taught, 'hybrid' curricula (where PBL
was one component of an otherwise lecture-based curriculum) and PBL groups all rated the use and value of self-directed learning above other learning approaches. The rating of the use and value of reflection and conceptualisation was highest in the PBL and lowest in the traditional group, however, indicating a sense amongst PBL students of some movement in their relation to knowledge. Then in teacher education Kleinfield (1991) similarly found PBL as successful for young students as with mature students, claiming they all expressed positive attitudes towards the method.

There were some findings, however, that focused the study on potential difficulties in implementing PBL for younger students, so central to this case study's interest. Shulman (1994) and Bayard (1995) found older PBL students responded more positively to PBL, becoming more self-directed in their learning than younger students in their classes. Their work indicated no significant difference between traditional and PBL groups, with Bayard’s students saying they did not think PBL enhanced their self-directed learning or problem-solving skills. At the same time Deretchin (1996) found older second-year medical students used and valued memorisation less than younger students in their learning processes. She also signalled a ‘natural’ preference for a less demanding, more passive form of learning, given the choice. These findings focused my questions about the course’s capacity to inspire excitement about learning and curiosity (Dewey, 1915) and to draw on our young learners’ strengths of what Aristotle called practical wisdom and Dewey called practical enquiry (Schubert, 1986).

At the same time Newman (1995) found in nursing education at the University of Alberta, that students thought PBL did not enhance their abilities to gather information or make decisions. This recalls the South African experience of medical education for black African students that compared critical thinking abilities of second, fourth, and sixth year students in problem-based learning programmes (Madolo, 1998). Though there were clear differences in our practices, her findings directed focus areas in this study. She found PBL “unable to enhance” the critical thinking abilities in, inter alia, “semantics” and
“assumption identification” the students were found to lack (Madolo, 1998:45-6) for reasons given below.

Madolo (1998) claimed no generalisability for her work, however, and indicated its limitations. First, the use of the “Cornell Critical Thinking Test Level Z (Ennis, Millman, & Tomko, 1985)” to measure levels of critical thinking (Madolo, 1998:29-30) in the context of a rural university in South Africa was problematic in terms of cultural and language differences. (It was “designed to measure critical thinking ability for advanced or gifted high school students, and other adults” in North America). In addition, while the scores were not compared against North American norms, they were subject to the limitations of testing critical thinking through multiple choice tests, with, for instance, only one opportunity to be tested and no space for acknowledging different approaches or personalities. Moreover there were questions about validity and the cause and effect relationship between critical thinking and problem-based learning (Madolo, 1998) with which this study is likewise confronted.

In terms of this study’s theoretical underpinnings, it was problematic to apply a ‘scientific’ approach of measuring scores for critical thinking in this way. Nevertheless, in view of our particular interest in developing critical thought, it was interesting to note that scores remained low even into the students’ sixth year. None of the students performed well in identifying or defining the assumptions underlying the problem and there was no discrepancy between scores and examination grades or staff perceptions identified. Madolo (1998:46) concluded that to develop higher order critical thinking skills these should be “specifically indicated in the objectives and curriculum” of the PBL programme, noting a discrepancy between the intention to promote critical thinking and its explicit incorporation in teaching programmes. This highlighted a fundamental difference in our practices, where Madolo’s (1998) focus was on preparing learners for their nursing profession through PBL and sought to establish whether they had developed skills in critical thinking in the process. In contrast our course objectives specifically included developing the kind of critical skills she found her students lacked.
Attributing low scores partly to difficulties in the English language (Madolo, 1998) alerted this study to a potential weakness here. Like Grosse (1985) teaching ESL learners language for business, we aimed to enhance their facility with the language through focusing on the problem rather than language and thereby limiting language insecurities. Questions about effective language development thus assumed it to be integral to development of thinking within the subject material, across the curriculum, an approach confirmed by Sutman et al, (1990). They assumed also that language proficiency would be developed through the ‘flooding’ effect of English textbooks, English lectures and written and oral communication for addressing this problem (Elley et al, 1996).

The literature thus provided both confirming and contradictory claims about PBL, in relation to the set of course objectives, outlined on page 154, and the corresponding research sub-question about the course’s capacity to help learners develop the required knowledge, skills and competencies to achieve academic success. The PBL literature was located mainly in contexts of ‘Western’ societies and cultures, first language students with relatively sound school experiences; within the framework of professional education and for post-first-year students if not postgraduates. In contrast to our situation the literature therefore generally assumed that students had adequate basic skills in academic reading and writing, summarising and synthesising. There was, nevertheless, a great deal of material that influenced areas of focus in my data analysis and evaluation processes relevant to this aspect of the course.

Critique of PBL Literature

The literature critique demonstrates absences in the literature, relating to the course aims to promote criticality and personal empowerment and the related research questions that ask if the curriculum was effective in enhancing intellectual and personal growth. The silences made me realise that the team was trying to implement more than PBL, as it was represented in the literature. In this section I want to illustrate that the concept of PBL was too
narrow for our context and purposes and the perceived need to recognise the learners' life experiences and cultures in the curriculum. The literature generally presupposed instrumental, individualist approaches and beliefs associated with 'Western' culture. PBL underpinnings thus did not support our existential interests and 'whole student' learning approach, which foregrounded African culture, recognised African knowledge systems and issues of hegemony, as raised in the discussion of the course philosophy on page 90. We sought to heighten students' awareness of these realities through promoting criticality and personal empowerment. The literature critique thus highlights important gaps that raised the question of whether our practice would have been better located in the wider literature of experiential learning, providing a context for exploring the question in Chapter Eight.

**PBL for Criticality and Social Awareness**

Although the above literature was mostly practice- rather than theory-based it reflected implicitly, at least, its Deweyan roots, and progressivism. Dewey's pragmatism thus provided common ground for the subsequent divide between the more instrumental pedagogy of training associated with (progressive) professional education and learning psychology, and the Freirean idea of emancipatory education drawing on the psychology and sociology of learning and knowledge. This study was interested in the kind of criticality that related to its context and emancipatory purpose and that pushed the boundaries of the PBL literature beyond its interest in promoting critical and analytical thought for the purpose of preparing learners for their various professions.

For instance, the work of progressive educational theorists like Schön (1983, 1987), a graduate, as it happens, of the Harvard Business School's problem-based curriculum (Barnes et al, 1994) and Boud et al (1985) was limited, in terms of this study's interest, by its professional education assumptions. They promoted, for instance, the notion of enhancing learning and extending perspectives, through incorporating reflection on prior experience in order to develop thoughtful, reflective, effective professional practitioners.
This case study was likewise interested in PBL's potential to develop thoughtful, reflective and effective students, in the context of first-year students in our socio-political context. It explored a further, more emancipatory dimension, of linking learning material to ordinary life experiences (accessible to relatively unsophisticated marginalised communities) and problematising the reality in which learners found themselves (Freire, 1994). Thus the context and purpose of our work demanded an extension of the way PBL had been used in the literature, to incorporate an emancipatory interest largely absent in it.

The literature thus revealed that Dewey's progressive ideas on teaching and learning had been taken on for the 'conservative' purpose of developing effective practitioners with inter alia appropriate problem-solving skills. Indeed Dewey's pragmatism has been highjacked in some ways by professional education, denying its sociologically based emancipatory interest in learning for life and for critical citizenship. Interrogating the assumptions underpinning a 'problem' or topical situation is almost entirely absent in the literature. What follows is a demonstration of where and why we were pushing the boundaries of PBL as conceptualised in the literature. We used the method to induce the kind of criticality and empowerment called for in our newly liberated, developing society context, for our students and for our purpose, as discussed in Part One.

My case study research questions about the curriculum's effectiveness in achieving all three aims assumed that PBL could incorporate a more radical application in terms of both content and process, than that represented in the literature. In epistemological terms our approach was conceived as an extension from Habermas' practical knowledge-constitutive interests (compatible with soft constructivism) to incorporate a critical, emancipatory slant. The questions drew on the ideas of curriculum theorists like Beane (1994), Bruner (1967), Cornbleth (1990), Dewey (1915) Doll (1990), Fleury (1998), Freire (1994), Grundy (1987), Jansen (1997), Knowles (1978), Laroche and Bednarz (1998), Schön (1983), Schubert (1986) and...
Stenhouse (1975). In educational philosophy terms these questions were located in 'radical constructivism' (Larochelle and Bednarz, 1998).

Pushing the literature’s boundaries on ‘critical thinking’

While sharing the kind of knowledge and ‘skills’ objectives discussed in the section above, the interests of this study precluded it from conceptualising these within a ‘training’ paradigm as reflected regularly in the PBL literature. It was evident in the early mission of the Harvard Business School: “to train (my emphasis) systematically in the universities a large class of men who will make a probable success in business, because they know all the administrative methods therein used…” (Barnes et al, 1994:39).

Again with my emphases the reference of progressive practitioners like Raisner (1997) to ‘ethical training’ and Gantt (1996) to ‘training in critical thinking’ indicated a pragmatic, soft constructivist, work-based approach. Though implicit within such practices may have been progressive post-structural theory the focus was acknowledged to be practical rather than theoretical (Barnes et al, 1994). There was certainly little evidence of critical reflection on the powerful position of the profession and the assumptions underpinning accepted theories or professional perspectives, priorities and practices. However progressive their practices, educators’ collaboration with and accountability to the professions were hardly conducive to posing political questions. Neither was this reality conducive to designing PBL curricula in terms of explicit curriculum or pedagogical theory.

The case study, unconstrained by the purposes of professional education, and responding to the newly liberated social context, asked questions about the curriculum’s capacity to induce criticality and this chapter focuses on possibilities of using PBL for the purpose. The questions were underpinned by an interest that went beyond promoting critical thinking and problem-solving skills for work, while acknowledging their basic importance for students.
That is not to say analytical skills and incisive thinking associated with 'soft' constructivism and instrumental pedagogy were not entirely appropriate in different contexts and for different purposes, for instance, in engineering, where students could learn bridge-building principles through problem-solving. Through carefully considered questions they could be prompted towards the 'correct' or 'best' answer, to come to understand and remember those principles far better than through a knowledge transmission mode. In fact it could be quite dangerous if students did not arrive at the best answer in that context. Illustrative of PBL's Platonic legacy, knowledge constructing processes in such contexts thus judiciously involved pre-determined knowledge and the leading or even manipulating of students towards what an instructor considered the 'right' answer.

In contrast the social science nature and context of this study suggested social dangers lay in learners not reflecting critically on knowledge and not recognising it as subjective, value-laden and powerful. Its emancipatory underpinnings precluded the 'leading' of learners to an answer and were supported by theorists like Boud and Feletti (1997), Coles (1997), Drinan (1997) and Schön (1987) even from within the ambit of professional education.

This study was therefore interested in the content of scenarios or 'problems' in the literature in terms of their potential to induce criticality and an interest in social issues. Progressive practices in the literature reflected the commonly propounded principle of using complexity to portray realistic, interesting situations and "rich, authentic tasks" (Carter et al, 1994:82). In fact practitioners of the last decade increasingly portrayed subject matter through what they described as realistic, messy and complex situations or open-ended problems (Allen and Rooney, 1998; Aspy et al, 1993; Barnes et al, 1994; Barrows, 1996; Carter et al, 1994; Chaharbaghi and Cox, 1995; Duffield and Grabinger, 1997; Elman and Lynton (1985); Jost et al, 1997; Muth et al, 1994; Philips, 1999; Pincus, 1995; Raisner, 1997; Stapleton and Stapleton, 1998; Wasserman, 1993; Waterman, 1997; Wilkerson and Feletti, 1989 inter alia).
They aimed to enhance capacities in students for developing "flexible structures of knowledge" (Carter et al, 1994:91) and "reflection-in action" (Schön, 1987:18).

In the Harvard Business School, for instance, Barnes et al (1994:42) argued that their method encouraged learners to "discover and develop their own unique framework for approaching, understanding and dealing with business problems". Drawing on Dewey's ideas of discovery and experiential learning, PBL practitioners regularly saw the benefit of involving learners psychologically and emotionally in exploring knowledge to enhance learning. Barnes et al (1994:50-51) acknowledged difficulties in defining the "administrative point of view" in their aim to train managers. They suggested thinking of it as "a manager's skill in ordering his relationship to an organization, understanding how that organization functions, what its needs are, and how to intervene constructively in its affairs to achieve desired change".

It was not in the interests of the school or the profession to promote the kind of critical reflection called for in our context for our students. Despite their progressive post-structural practice there is little emancipatory in the above working definition to suggest critical reflection on the organisation's 'needs', why it functions in a particular way, and the power it has to establish the kind of constructive intervention deemed acceptable. This imposes a conservative interpretation of the progressive "in-class experiences (they) hope to create for (their) students" set out as follows:

- "A focus on understanding the specific context" of a case and "the key challenges facing this manager, at this time, with these resources and limits".
- "A sense for appropriate boundaries... so as to balance the need for breadth (to include all essential factors) with the need for sufficient focus (to enhance the probability for constructive improvement)".
- "Sensitivity to interrelationships: the connectedness of all organizational functions and processes" with "the effective manager (thinking) about the organization holistically and behav(ing) accordingly".
• "Experiencing and understanding any administrative situation from a multidimensional point of view" bearing in mind "historical legacy and future perspective", that problems will be "understood differently by individuals and groups, that perceptions and agendas change dramatically by organizational level and the need to deal with "inevitable conflicts" of a "multidimensional context".

• "Accepting personal responsibility for the solution of organizational problems ... defin(ing) problems in ways that encourage their solution and then accept(ing) personal responsibility for the accomplishment of that objective".

• "An action orientation" with the manager helping the organisation "deal with problems and exploit opportunities, to move it from an imperfect present to an improved future" where "action is the key ingredient in an administrative point of view".

(Barnes et al, 1994:50-51).

While this approach marks progressive advances in professional education, it demonstrates a purpose for using PBL quite different from ours, fundamentally maintaining the status quo and perpetuating its basic perspectives as 'natural'. It does not examine, for instance, the essential factors in solving a problem; how deeply they should be considered; how 'constructive improvement' is defined and by whom; how critically problems should be examined in terms of different agendas and perspectives; what is meant by 'dealing' with problems; what amounts to 'imperfection' and 'improvement' in business and in whose view.

This kind of use of PBL thus invited little consideration of the sociology or politics of knowledge in terms of Freirean 'power' issues, Illustrating the common Deweyan roots of, and subsequent divide between the more instrumental professional pedagogy and emancipatory education for good citizenship. One set of research questions related to those course objectives similarly concerned with helping students "acquire the skills and language of their field, deal with ill-structured information" and, to a point, to help them "think more like professionals" (Carter et al, 1994:82). The second set, however, related to a different interest, in developing critical citizens.
There were absences in the literature relating to this different purpose and extended interest in challenging students to think also about issues of power and social justice in, for instance, managers' decisions. Thus while complex problems in the literature represented progressive innovations with content creatively selected to enhance learning, decisions about what counted as relevant knowledge were influenced by assumptions and accepted knowledge and perspectives of the profession. The power/knowledge relationship thus made the professions relatively unassailable in terms of critique by outsiders, particularly from marginalised or minority sectors of society. It was not in the interests of pragmatic, work-based practices to challenge that, resulting in the unquestioning perpetuation of the status quo, inappropriate in our context at least, and leaving silences in terms of this study's interests.

Through appropriating discourses, knowledge and power (Young, 1981, after Foucault), without promoting the examination of underpinning assumptions, PBL could indeed be used to reduce natural skills and subdue natural intelligence and curiosity, for instance, in examining a profession's agenda and interests. Thus while there was much to be learned about the use of complexity, messiness and open-endedness in the literature, there were silences about using such content to promote understandings about domination, hegemony and alienation so integral to our learners' experience. (Chapter Four describes how we attempted to incorporate such issues in our business-related scenarios).

In terms of these interests, such progressive advances in PBL practices remain more conservative than commonly owned by practitioners. The absence of curriculum or pedagogical analysis and the silences about political questions and curriculum negotiation illustrate how Dewey's pragmatism lead to the instrumental pedagogy of training on the one hand and emancipatory Freirean ideas of education on the other. Nevertheless, there is increasing evidence of theorists and practitioners like Bawden (1997); Boud et al (1985); Boud and Feletti (1997); Coles (1997); Drinan, (1997); Duffield and Grabinger (1997); Gijselaers (1996); Nagel (1996) – in the context of young school
children; Ryan (1997); Schön (1987) and Taylor and Burgess (1997) critiquing PBL in relation to curriculum theory, validating my questions about PBL.

The critique of PBL by Boud and Feletti (1997), Drinan (1997) and Coles (1997) justified my questions and located our approach more broadly in experiential learning, begging the reflections in Chapter Eight. Drinan (1997) conceived PBL as a widely used non-traditional approach to education, implemented:

in the hope of creating active, interdependent and independent learners; holistic, divergent, creative thinkers; people who can solve problems or improve situations; better communicators; people who are able to entice the best from others; people who are aware of their own talents and who are confident in using them

(Deinan, 1997:333).

He confirmed my view, however that PBL practices often fell short of these goals, and particularly of ‘higher purposes’ that “should involve a depth and breadth of thought which might ultimately lead to the freedom to challenge, rework and appreciate one’s most cherished fundamentals” (Drinan, 1997:335). He thereby struck a direct chord with this study’s questions about PBL’s capacity to promote free thought, and how its ‘Western’ individualistic, instrumentalist interests have imposed limitations on the method. While Drinan (1997) acknowledged it would be unrealistic to expect all PBL practices to have such goals he argued that PBL practitioners should clarify their purposes. Indeed he saw the basic, original PBL “desired or attainable end-point” as “the acquisition of relevant information and its organization into making decisions, and the capacity to go on learning independently” (Drinan, 1997:335). He saw the limitations of PBL where it became “mechanical in practice, destined merely to train students to solve problems and acquire the knowledge needed for this” (Drinan, 1997:334) highlighting the inadequacies of ‘soft’ constructivism for promoting problem posing.
Of particular interest to this study is his shift in focus to the “higher purposes” of “generating the desire and ability to think deeply and holistically”; generating an enthusiasm for learning from all of life’s experiences in personal, professional and community development”; “encouraging a search beyond one’s own preconceptions, so becoming ultimately innovative and positively critical with respect to self and one’s profession and society” (Drinan, 1997:334-5). He recognised, furthermore the space that needed to be made for the input, for instance, of different (‘non Western’) perspectives and the promise this held for promoting a “richer, more harmonious society” (Drinan, 1997:338). He thereby supported this case study’s interest in ‘whole student’ learning that induces criticality and empowerment, for promoting both deep processing and elaboration of knowledge, critically reflective attitudes and examination of assumptions underpinning accepted knowledge - be it their own, their peers’ or ‘expert’ knowledge.

Like Coles (1997), however, Drinan (1997) argued that this interest made such pedagogies lie outside the ambit of PBL, saying experiential learning provided a more appropriate framework for their more emancipatory purposes and pointing me to the question pursued in Chapter Eight. Nevertheless, PBL, as we understood the method at the start of the study, did not necessarily exclude our ‘higher purposes’ and emancipatory interests.

The context and ideology of this case study led to questions about the course’s capacity to promote critical reflection in students with little discipline-based knowledge and little understanding of the formal (‘Western / Northern’) business environment. They were less about learning problem-solving skills through solving ‘doable’ problems than about deeply processing and elaborating knowledge in ways that were not automatic in PBL (Coles, 1997). This study thus asked questions about the effectiveness of problematising situations and helping students to integrate new knowledge within personal frameworks, to make it not only understood but believed (Grundy, 1987). Given the schooling background of our learners there was thus an existential element to the case study question that recognised their need to develop a new relation to knowledge, and new ways of thinking. It involved developing
new perspectives on their experiences, generating related abstract thought and "the possibility of changing behaviour" (Coles, 1997:321).

The silences in the PBL literature in this area thus focused questions about PBL's potential to develop criticality in this sense and to accommodate a more existential and emancipatory interest. The study incorporated but went beyond exploring the course's effectiveness in enabling students to enter the workplace as graduates capable of thinking for themselves and solving problems, attributes recognised as PBL-related by employers (Woods, 1996). The interest here was in the curriculum's capacity to develop in students the kind of autonomy associated with critical citizens as conceptualised by Dewey.

PBL for Personal Empowerment

The third set of course aims and objectives on page 154 reflect our aim to promote personal growth. We sought to provide a supportive, nurturing environment for our students, conceptualising this in terms of a liminal experience (Van Gennep, 1960) as elaborated on page 335, that would facilitate students' passage from the familiar to the unfamiliar. The research question here related to the potential impact of affective curricula and a 'whole student' focus on self-perceptions of students "subject to pervasive prejudice and bias" (Beane, 1994:74), so relevant to our context. It was concerned with PBL's capacity to empower students with self-confidence, but more than that a sense of self-worth and associated well-being and how this impacted on learning. Informative to the case study was the PBL literature's enthusiasm for its capacity to enhance learning through a learner-centred environment.

The purpose was generally to stimulate the confidence to participate in problem-solving processes, and to 'take risks' in expressing their ideas; to develop better interpersonal skills (Bligh, 1995); to activate prior knowledge and experience; to motivate and support learners (Pincus, 1995; Duffield and Grabinger, 1997; Woods, 1996), enhancing innovation, involvement and
autonomy (Bligh, 1995); to stimulate analysis (Hartman, 1992); develop an appreciation of others’ viewpoints and a tolerance of ambiguity (Carter et al, 1994; Elman and Lynton, 1985; Gantt, 1996; Christensen, 1991,1993; Phillips, 1999; Stapleton and Stapleton, 1998; Wassermann, 1993). Aspy et al (1993), for instance, found PBL students “less threatened” by their environment than lecture-based students and Stapleton and Stapleton (1998:161) found they became “bolder and more confident” with each case method course they took.

The literature thus focused my attention on further questions, extending the notion of learner-centredness in the context of work into a context of marginalised, disempowered communities in a young democracy with a racially polarised society. I explored PBL’s capacity to help students believe in themselves, their views and their rights; to provide a ‘safe’ environment for risk-taking in the form of interrogating their own ideas and those of their peers and teachers, in light of new knowledge, and to tolerate if not celebrate different views; to recognise power and hegemony in knowledge; to be empowered to “speak truth to power” (Jansen, 2001:5) if they chose; to choose not to challenge inequities and injustices – linked to racism, for instance, if they so wished, but to recognise this as a choice or strategy devoid of feelings of inferiority.

There were silences in the literature, particularly in regard to our existential curriculum interests that related to our specific context and students. They indicated the initial confusion of having conceptualised the course as PBL and then pushed its boundaries, in terms of how it was reflected in the literature. We were therefore applying a particular version of PBL that could have been better conceptualised as experiential learning. We were drawing, furthermore, on curriculum and learning theorists located outside the PBL literature, but continued to consider the methodology to be problem-based.

There were some focuses in the literature, nevertheless, that informed our concern for promoting learner-centredness. These are explored below in terms of common interests in first, linking new work to prior knowledge and
experience; second, the teacher-student relationship; third, small-group learning; and fourth, power-sharing.

Links to prior knowledge and experience

There was some focus amongst practitioners on linking new to prior knowledge and experience (Allen et al, 1996; Barnes et al, 1994; Barrows and Tamblyn, 1980; Barrows, 1996; Bradbeer, 1996; Carter et al, 1994; Chaharbaghi and Cox, 1995; Christensen, 1991; Duffield and Grabinger, 1997; Gijselaers, 1996; Lang, 1987; Schug and Cross, 1996); Wilkerson and Feletti (1989:52), with Gijselaers (1996) stressing its theoretical basis in cognitive psychology. Informative to the study was their general finding that learning was enhanced through encountering problems first with only their prior knowledge, just as problem-solving occurs in real-life situations. They advised that students should analyse and resolve a problem as far as they could, before facts and principles were provided, to encourage the expansion of their knowledge bases (Wilkerson and Feletti, 1989).

The way we used PBL was strongly influenced by this principle that was expressed through the PBL literature and by curriculum theorists like Entwistle and Ramsden (1983), Kolb (1984) and Rowntree (1981). There were absences in the PBL literature, however, in terms of our aim to empower students, not just as learners, but as people who need to develop strong self-concepts to overcome their sense of inferiority, and to have their prior knowledge and experience validated. This focused my attention on questions about our practice’s capacity to impact on students in this way and on data in the case study that would help me assess it.

The teacher-student relationship

There were widespread claims in the literature for PBL’s effectiveness, where the teacher adopted a role of guide to, rather than transmitter of, learning. In

The literature thus reflected Dewey's interest in shifting the power inherent in a didactic teacher's position to develop a facilitative power-sharing role. Of particular interest to me were questions about the freedom this provided learners and its value in helping learners to think independently in their quest for understanding, and to gain understanding through engaging intellectually with their teachers in meaning constructing processes (Nagel, 1996).

Focusing my questions further in this area were practitioners who linked the teacher-student relationship to the concept of power-sharing (Grosse, 1985) and democratic processes where teacher and students were equally entitled to their opinions (Stapleton and Stapleton (1998). The latter argued that teachers should "colearn and coconstruct reality with students in a dialectical, dialogical process" saying they should collaboratively "create stories about the people and organizations in the cases", introducing transactional analysis concepts (Stapleton and Stapleton, 1998:158). They thereby confirmed the strength of our egalitarian approach, described on page 161, and the importance of introducing transactional analysis and assertiveness training in our orientation.

Stapleton and Stapleton's (1998) work demonstrated that we shared with them the aim to "develop better understanding and comprehension of ... the business domain..." and to develop abilities in reading, analytical and creative
thinking, and communication ability (Stapleton and Stapleton, 1998:160). Also Barrows’ (1996:5) notion of the tutor asking students “the kind of questions that they should be asking themselves to better understand and manage the problem”, reflected our interest in empowering students as lifelong learners and critical thinkers. However, the silences about the role of the teacher-student relationship in empowering them further, with, for instance positive self-concepts and sharing course ownership through curriculum negotiation, highlighted the difference in context and purpose and focused my questions in this direction.

Small-group learning


Relevant to some of the focuses of this study were findings that group work was motivating and supportive (Pincus, 1995:95-97; Allen et al, 1996; Jost, 1997), enhanced autonomy (Bligh, 1995), and improved the quality of presentations, reports, general class discussions (Thomchick, 1997) and information analysis (Hartman, 1992). The literature demonstrated confidence in the method’s capacity to help group learners “negotiate and make sense of new ideas” in developing a solution collaboratively (Chaharbaghi and Cox, 1995:253). It was also valued for its ability to promote critical thinking and an environment where students could ‘risk’ exploring ideas interactively without fearing making mistakes (Wilkerson and Feletti, 1989).
Christensen’s (1991: 25-27) concept of a learning community was particularly relevant to our learners’ needs as “speakers not only present(ed) points of view but test(ed) and modif(ied) their ideas; instead of doggedly defending personal conclusions, they listen(ed) to one another with interest, not fear....” His argument that students’ vulnerability was minimised through promoting trust and respect highlighted the crucial role of a nurturing environment for the effective implementation of PBL, particularly in view of our students’ extreme vulnerability as they entered the relatively alien university environment. This was supported by Grosse’s (1985) findings from teaching ESL learners language for business that it helped remove students’ focus from their language insecurities and Sobral’s (1995:99) claim in his developing society context of a “personally more meaningful experience” for students.

The work of Wyllie-Sayed and Bond (1997) particularly focused this study on two counts. First their black African students found group learning provided peer learning support and helped build confidence, and second they (and Mammen, 1996) attributed difficulties and stress to the ‘jarring’ of the approach with what students were used to in school.

The literature thereby demonstrated that small group work was widely considered an important aspect to PBL from first-year through to postgraduate courses, even for fully advantaged students, focusing this study on its potential for empowering our students. It therefore asked questions about small group learning’s capacity not only to acquire new knowledge, but also to help learners develop a new relation to knowledge that would, in itself, be empowering to them. They concerned the potential of collaborative PBL to allow students to experience knowledge as subjective, interested and socially constructed rather than transmitted by an ‘authority’. They were interested in its capacity to help students learn knowledge, not just in a cognitive sense, but in a personal sense, to make it “authentic” and therefore believable (Grundy, 1987:126) and personally owned. Furthermore, they were interested in its potential to empower students through promoting self-knowledge and self-development resulting from the attachment of personal values to arguments and verbalisation of these values.
The literature thus focused my questions about the capacity of a learner-centred PBL environment to promote "affective qualities, especially in relationships with others" (Faure, 1972:156), recalling Knowles' learning climate with "relationships of trust and co-operation between learners" with the teacher a "co-learner in the spirit of mutual enquiry" (Jarvis, 1988:174). I pondered on PBL's potential to help students overcome insecurities, to take 'risks' in their thinking to seek new truths, to recognise the relationship between power and knowledge and the interested nature of knowledge. I explored its potential also for personally empowering students through validating their wealth of experiences, perspectives and opinions gathered in the course of their lives and demonstrating their relevance to new, formal knowledge.

Power-sharing

There were some references in the literature to power sharing in relation to the teacher's relationship with learners as co-learners as discussed above. Particularly relevant to the study's questions about personally empowering students through power-sharing was Wassermann's (1993:28-29) argument for giving learners the "power to make changes" and some control over their environment as a basic human need to "make choices for themselves, when they are given options in situations that genuinely matter". She argued that when people's choices are respected, "they grow to believe in themselves", and that the case method gave opportunities for learners to have control over what they do and how they do it. This, she found, gave them "considerable freedom to think (their) own thoughts, in an environment that is encouraging and safe".

This reflected an important aim underpinning our practice. Chapter Five raises implementation problems, however, in finding the right balance between authority and freedom, particularly in negotiating the curriculum. An important focus of the study therefore concerned PBL in relation to promoting
a democratic, egalitarian approach and thereby sharing power with learners. However aside from Wassermann (1993) the only references to PBL and power sharing found were Gregson (1994), Muth et al (1994) and Nagel (1996).

First, Gregson (1994) found it benefited his trade and industrial students in an employability skills course. Second Muth et al (1994:443) pointed to difficulties in achieving both rigour and the “participative democracy” and “moral leadership” they aimed at in their problem-based educational administration preparation programme at the University of Colorado, reflecting similarities with our experience. Because staff “power and prerogatives” were threatened they had to “rethink their roles, their purpose, their power and their relationship to their field colleagues and students”. Muth et al (1994:444) warned, however, that a teacher in the role of “co-equal” could lead to a decline in rigour and suggested minimising the problem through “support(ing) the connections between theory and practice” by “clearly defining expected outcomes” (Muth et al, 1994:447). Both warning and advice reflected our course team’s concerns and deliberations, as we too needed to ‘unlearn’ and ‘relearn’ our approach in finding a more effective balance between authority and democracy.

Third, in the context of upper primary or lower secondary school children, Nagel (1996) found her use of power-sharing through curriculum development processes and curriculum choices empowered her learners to make sense of their learning and to take ‘ownership’ of it. This reinforced my interest in the impact of power sharing on learners’ relation to knowledge and questions about how to achieve an effective balance between permissiveness and authoritarianism (Freire, 1994).

In the context of this study, the team was concerned with providing a new experience of democratic principles to our learners. This was particularly relevant in our young democracy and violent social context, where differences of opinion led to death with awful regularity. However, the PBL literature was almost entirely located in professional education within developed societies,
leading to silences in terms of questions like these, arising directly from this study's context and purpose.

**Conclusion**

This chapter has reviewed the PBL literature in relation to my questions about the practice's effectiveness in providing a holistic learner-centred experience and promoting academic, intellectual and personal growth. The literature justified the curriculum in terms of the one aim to help students develop the knowledge, skills and approaches needed by a competent student, confirming the team's initial understandings of the PBL method. On exploring the literature more fully, however, I found absences in terms of the remaining two aims. These represented our more emancipatory purpose that foregrounded the South African context of a newly liberated, developing society and African culture. This was not supported by the PBL literature which was found to have an instrumental, individualist, 'Western' orientation that denied a 'whole student' approach to learning.

There were silences about aspects of the course that we have seen highlighted as important in enhancing learning. For instance, the PBL literature revealed little interest in the course's existential concerns and the value found in drawing on the students' prior knowledge, experience and perspectives at the start of their university studies, before immersion in formal discipline-based knowledge. Similarly, there was little focus on the role of a learner-centred environment in personally empowering students or in inducing new ways of learning and 'knowing' that recognise African culture and promote the critique of powerful, 'accepted' 'Western' knowledge.

This led to my questioning the adequacy of PBL, as represented in the literature, as a conceptual framework for the curriculum studied and for answering the main question about the relationship between learning conditions and outcomes. From this came the supporting research question that asks if experience-based learning would have provided a better
theoretical frame for the curriculum than PBL did. Consequently, in the next chapter I will try to demonstrate how this literature would have enhanced the team's understanding of the practice, in terms of the interest in accommodating students' life experiences and African culture in order to promote free thought. This will, in turn lead to further questions that need answering and these are raised in the final chapter of the thesis.

Before we move into Part Three of the thesis, however, we need to bring Part Two to a close. Having looked at the research method, the course plans, the implementation and evaluation of the curriculum against these plans, and now having explored the PBL literature in terms of the curriculum studied, we are ready to draw an end to Part Two. To do this we will look at the overall conclusions drawn from the case study and we will do this in the Conclusions that follow.
CONCLUSION

In this section, we will look at what can be concluded from the single case study and how these five chapters have contributed to the answer of the research question that asks if we can affect learning outcomes through the way we implement a curriculum. We will consider these chapters in terms of data that both informed the conclusions and provided a basis for asking further reflective questions, which in turn lent support to the case study. The data represent the strengths and limitations of what was done and are presented in three sections, which are:

- the research method;
- the learning outcomes;
- the PBL literature.

The Research Method

This was a single case, studying one instance in which a curriculum was implemented in a very specific period of South African history, which made it unrepeatable, as illustrated in Part One. Hence the findings were not generalisable, and the case study could only produce hypotheses about other applications, rather than cut-and-dried answers or prescriptions. It has shown, nevertheless, that the curriculum studied did offer the kind of learning conditions that traditional curricula did not, and that the students who were exposed to these different opportunities achieved significantly better marks across a range of courses than those who were not.

We recall the discussion on how shortcomings in case study research were minimised, and strengths harnessed. A strength in the method was that it enabled a rich, nuanced picture to emerge and that the conclusions informed further plans and course developments that are outlined in the Introduction to Part Three. This subsequent work enriched the thesis by helping me answer
the research question at another level, when I explored the further question of the study's wider applicability. We shall consider this aspect of the study in Chapter Ten.

Problems with the research method reflected loose planning and the hasty course development process. It represented what the Dean called a 'learning-by-doing' process, typifying contexts of rapid change when time and resources cannot be set aside for curriculum development projects, but faculty plans and decisions have to be made about how best to meet the demands of the changing context. I was at a stage in my own academic journey where a research project had not progressed beyond a tentative proposal, but the course team were keen that I evaluate the practice as best I could. Thus, integrated within the course implementation process were ongoing development and evaluation processes, more characteristic of a critically reflective practitioner approach than of a formal, well-prepared piece of research.

While in Chapter Three I argued that there were some strengths associated with this work, there were also limitations. One problem, for instance, was my lack of preparedness and clarity in terms of research literature, resulting in a great deal of data being collected. While this perhaps led to over-assessment, a rich, nuanced picture was portrayed and the data were useful in illuminating the strengths and shortcomings of the practice. Similarly, the course development process was carefully documented in order to enhance understandings about both process and practice. This gave rise to data outside the scope of the case study research questions and we will see, later, how they subsequently informed some of the reflections of Part Three. A second problem of the case study was my position as both 'insider' and 'outsider' researcher (Merriam et al, 2001) which must have influenced the data interpretation and analysis. Nevertheless, we saw how the critically reflective procedures amongst the course team and students helped to limit biases and cross check data, to enhance the validity of the conclusions.
Learning Outcomes

Recalling the discussion of the curriculum in Chapter Four, and findings of Chapters Five and Six, we will now consider the conclusions that were drawn in answer to the case study question and sub-questions. There were strong indications that the course's learning context did help students grow personally, academically and intellectually to develop an 'intellectual' relation to knowledge. The data also strongly suggested that 'our' students did come closer than their peers to achieving their academic potential, thereby helping me answer the research question that asks about the relation between learning conditions and outcomes. In any event, the statistical analysis of data showed that 'our' students achieved significantly better examination marks than 'other' students, and there were also strong indications of better 'throughput rates', despite the relatively disadvantaged backgrounds of 'our' students discussed in Part One.

One important factor differentiating the experiences of 'our' and 'other' students was the different approach to teaching and learning offered through the curriculum studied. The case study conclusions are discussed below in terms of answers to the three sub-questions, which ask about the curriculum's impact on learning outcomes through enhancing in students:

- personal growth;
- academic growth;
- intellectual growth.

The conclusions recognise flaws but also successes in implementing the planned learner-centred experience, with appropriate teaching and learning methods to enhance personal growth. Likewise, they draw on findings that suggest strengths and shortcomings in terms of the course aims to promote academic and intellectual growth.
While quantitative data provided a check on qualitative data, the latter also helped me make sense of statistical findings as I sought to draw conclusions about the curriculum. For instance, the mainstream lecturers' reports of 'our' students asking more thoughtful questions and showing more willingness to engage in discussions and defend a viewpoint than 'other' students, as discussed on page 247, suggested that the outcomes were related to students' self-directedness and free thought. At the same time, a study of outcomes by matriculation points revealed that in each category 'our' students achieved a higher distribution of marks, all statistically significant except one, as discussed on page 229.

These data are considered below, in terms of the tentative conclusions they enable me to draw about the practice's effectiveness in promoting personal, academic and intellectual growth.

Personal Growth

The findings strongly indicate that the learner-centred experience and 'whole student' philosophy played a fundamental role in enhancing learning (and that this was crucial to the students' intellectual development). There were various indicators, moreover, strongly suggesting that the selection of content material and of teaching and learning methods, content material and the provision of a relatively democratic, egalitarian, warm and friendly environment, were central to this holistic approach. The curriculum's strength was, in fact, linked to its conception as a liminal experience that was nurturing, safe and supportive and which was found to have helped students deal with the 'culture shock' of the new social and educational environment. This experience was associated with opportunities for developing a collective identity and mutually supportive, friendly space and the development of self-worth, emotional well being, assertiveness, self-awareness and other-centredness.

These attributes, though difficult to quantify, were indicated, inter alia, by abilities to express personal views and accommodate diverse perspectives
through democratic learning processes. The experience was found to promote trust and mutual respect and to harness the 'other-centredness' or 'ubuntu' of African culture, to the extent that most students felt 'safe' enough to take risks in exploring their own and their peers' thinking (and the assumptions of dominant knowledge). This was done in relation to prior understandings, values, beliefs and new knowledge. Difficulties in engaging the shyer students were found, as discussed on page 219, and subsequent courses have attempted to overcome this shortcoming with some success as raised in the Introduction to Part 3, on page 306.

At the same time, democratic teaching, learning and consultative processes were found to promote personal empowerment by providing a 'primary' democratic experience. This included students enjoying egalitarian relationships with staff, observing staff's modelling of democratic decision-making processes and participating in them. There were, however, some problems indicated in implementing a democratic curriculum, in terms of difficulties in managing the course and finding the optimum balance between democracy and authority. Recommendations for overcoming this shortcoming were subsequently implemented, as discussed in the Introduction to Part Three.

There were strong indications that learners were personally empowered when they were given opportunities and encouragement to challenge authority by questioning both content and curriculum choices and decisions, as discussed on page 191. At the same time, the selection of interesting, controversial, topical content material, linking to the students' prior knowledge and experience, was found to be effective in promoting personal growth, as indicated on page 186.

It was also strongly indicated that the course stimulated curiosity and reflection, helping students to make personal sense of theory and therefore to achieve good test marks, further enhancing self-worth. In addition, both content and process were found to have reflected the concept of learning as
biography, underpinned as they were by an existential orientation and focus on 'whole student' needs.

The above findings thus led to the conclusion that the curriculum could promote personal growth, despite some shortcomings, and that this was a crucial aspect of the practice in terms of its effectiveness in helping students develop an 'intellectual' relation to knowledge and learning.

Academic Growth

The findings indicated strongly that the teaching methods and learning environment had promoted the kind of academic skills, knowledge and attitudes required of a competent student. Although students' reading, writing and English language skills were found to have improved, shortcomings in this area were noted, as discussed on page 199. The recommendation for further work in this area was built into subsequent courses, with some indications of success, revealed in Part Three's Introduction on page 306, and some challenges remaining for the new 2003 course implementation.

The realistic scenarios representing practical, transdisciplinary business-related knowledge were found to have promoted problem-solving skills and thus to have led to the acquisition of knowledge and understandings appropriate to a competent learner, as indicated on pages 194 and 240. Furthermore, the scenarios' effectiveness was associated with the provision of something close to a 'primary' learning experience in terms of 'experiencing' practical knowledge within a realistic situation that foregrounded realities in the students' lives. This was found to be crucial to learning, particularly in view of the fact that the students' other learning opportunities were largely limited to receiving theoretical knowledge transmitted by the lecturer or textbook and separated into disciplines. (It was noted that this comprised the total experience of 'other' students with whom their academic performance was compared).
It was strongly indicated that the teaching methods promoted co-operation amongst students and collaborative teamwork on the one hand, and independence and self-directedness on the other, as discussed on pages 194, 235 and 238. At the same time, the curriculum was found to have helped students develop self-awareness and to reflect on the strengths and weaknesses of their learning strategies, adjusting them accordingly. There were indications, nevertheless, that some students had not developed adequate metacognitive capacities and recommendations were made to address this.

Despite some problems, it was thus largely concluded that the practice had been effective in promoting academic competence and that this contributed to students' developing an intellectual relation to knowledge.

**Criticality**

The course was found to have largely succeeded in promoting criticality and this was closely linked to the curriculum's effectiveness in enhancing learning, as discussed on page 247. Contributing factors, discussed below, were primarily the selection of course content and of teaching and learning processes; the personally empowering nature of the learner-centred environment; the coherence between teaching and learning methods, course development and course evaluation processes.

There were strong indications that critical reflection in students was related to the controversial, topical, relevant and accessible nature of the subject matter and also teaching and learning processes that promoted free thought. These processes were found to provide students with opportunities to experience knowledge as uncertain, subjective, value-laden and connected to their various biographies. While students found this way of relating to knowledge to be threatening at the start, the supportive environment helped them to take risks in problematising prior understandings, beliefs or values as well as new and dominant knowledge. The capacity to think independently was closely
associated with abilities to deeply process and elaborate knowledge, requiring students to accommodate new knowledge within their personal conceptual frameworks to make sense of it, as discussed on page 194.

The teaching and learning processes were also found to have enabled students to experience the relation of power to knowledge and to identify issues of ethics and social justice as points of interest for debate. The subject material was strongly associated with the course's capacity to generate students' interest, lively debate and integration of different knowledges.

The curriculum was thus found effective in enabling students to construct knowledge through interactive processes and to exercise their own judgements in reaching decisions, although students were initially frustrated that there were no pre-determined 'right' answers to the 'problems'. However, there were strong indications that exposure to the approach and to the learner-centred environment helped students come to terms with the related uncertainty, and later to identify this as an important milestone in their learning biographies.

At the same time, the data indicated that students became increasingly less resistant to accepting lack of consensus as an outcome of learning tasks, agreeing to disagree on how a 'problem' should be resolved. Students found this frustrating at first, reflecting the place consensus holds in African culture, but scenarios experienced as irresolvable, or dependent on individual perspectives and values, producing non-consensual decisions became 'living documents'. Students were found to refer iteratively to the inconclusive issues, indicating ongoing grappling with complex questions raised and therefore deep processing and elaboration of knowledge. Lessons learned from implementing the course, however, informed subsequent developments that led to managing more effectively, students' frustration with this kind of knowledge and learning, as discussed in the Introduction to Part 3.

The study found that the facilitator's role-modelling of 'an intellectual' was crucial in promoting critical reflexivity in students and therefore to the
effectiveness of the course. This was achieved through demonstrating critically reflective approaches, free thought and willingness to accept, and indeed enjoy, different arguments supported by logic. It was strongly indicated that the coherence between this role-modelling and the teaching, learning and course evaluation processes demonstrated course integrity, enhancing its capacity to promote a ‘critical community’ and hence criticality in students. In the same vein, the facilitator’s personal interest, with choice of course content and processes, discussed on pages 170 and 175, contributed to the foregrounding of issues of social justice and ethics for discussion. Indeed his warm, outgoing personality and critically reflective attitude was found central to the course’s capacity to promote criticality in students.

The case study strongly indicated that this critical reflexivity involved the interrogation and contextualisation of knowledge and personal understandings and was linked to capacities and interests in deeply processing and elaborating knowledge and thereby to the good examination marks, particularly in courses that provided opportunities to demonstrate such understandings. Hence it was concluded that, despite some shortcomings the course did promote criticality.

There were thus strong indicators that the course had promoted academic, personal and intellectual growth in our students, and based on them I suggest that the course was an effective tool for enhancing learning. This helps me answer the research question, in terms of linking the curriculum to the outcomes, but it also raises questions that emerge from the next section, which represents conclusions from the last component of the case study, about the relation between the curriculum and PBL.

The curriculum and PBL

In Chapter Seven we saw the strengths and weaknesses of PBL as an innovative approach to learning in relation to the three research sub-questions and the course evaluation. Having called the approach ‘PBL’, I found synergy
with the literature only in terms of the curriculum’s interest in developing competent learners, or academic growth, and to this extent the literature legitimated the practice. The other two course aims of personal and intellectual growth were not well supported by the literature, reflecting different purposes and interests and its Western orientation. PBL had been widely implemented in accordance with individualist, instrumentalist underpinnings and interpreted within the framework of educating for professions, and the literature did not accommodate the curriculum’s ‘whole student’ learning approach. This raises the question of whether the curriculum would have been better framed by the wider literature on experience-based learning, which will be addressed in Chapter Eight.

The way forward

By its very nature, the case study demanded being problematised, if its hypotheses were to be strengthened. The conclusions, that: the single case study provided rich data that was not generalisable; the course had been effective in enhancing learning through promoting academic, personal and intellectual growth; the PBL literature provided an inadequate theoretical framework, thus left me with a number of problems that became the research questions of Part Three. We are now in a position to explore these questions in the following three chapters and to see how they reinforce the case study. We will also see how they help me answer the research question about possibilities of the learning opportunities affecting the outcomes, at another level.

To this end, we will look at the investigations into: experiential learning theory as a better theoretical framework than PBL for the curriculum as described in the case study; the replicability of the curriculum more broadly, in view of the difficulties the University experienced in implementing its strategic plan, as discussed in Chapter Two; the wider applicability of the case study itself, in the light of the succeeding five years’ experience with the curriculum studied.
Before we can explore these questions, however, we need to look at the ways in which the curriculum was developed over the five years following the initial implementation, in response to the evaluation and the changing context. Having considered the above conclusions and noted that they led to further research questions, we are now going to look at subsequent developments to the approach so that we will understand the broader context of the reflective research. We will do this in the Introduction to Part Three, which follows.
PART THREE:
REFLECTIONS
INTRODUCTION

Having answered, on one level, the research question of whether we could improve the learning opportunities for our students and affect the learning outcome, we are now going to try to answer the question at a different level. We will do this by addressing the further questions with which the case study conclusions confronted me when I problematised the experience during the phase following the initial course evaluation of 1997. At this stage, there was time to reflect on the practice while developing it iteratively in response to the case study findings and to the ongoing changes within the University and the country. While I continued to gather further data there was also time to explore relevant bodies of literature.

Since the further reflective questions drew not only on this reading and the case study conclusions but also on the subsequent data, we need to look first at the curriculum developments that occurred over the period following the first course implementation. We will then understand more fully why the three reflective research questions confronted me in my quest to answer the main research question. The Introduction is therefore divided into three sections, which are:

- the post 1997 reflective phase;
- subsequent curriculum development and evaluation;
- reflective research questions.
The Post 1997 Reflective Phase

After the initial course implementation and evaluation there was a period of data-gathering, analysis of students' progress through their courses leading up to graduation, and reflection on the case study and ongoing developments to the course, in response to lessons learned. This stage of my academic journey involved also exploring relevant literature, mainly PBL, experiential learning, qualitative research methods and emerging policies and debates influencing South African education policy. It involved writing and discussion, including the cross checking of my interpretation of data amongst colleagues within the programme, and inviting debate with fellow South African practitioners and theorists through conferences.

Rapid changes marked this period, in terms, *inter alia*, of the changing socio-political context and the University's shifting student demography. The unique historical moment had passed and was unrepeatable. Thus the course could not be replicated in its entirety but it was being developed to reflect an appropriate response to the changing context of the emerging democracy. There was much in the South African context, nevertheless, that was not discontinuous with the 1997 experience, including ongoing socio-economic challenges to the new government specifically those relating to education.

Subsequent Curriculum Development and Evaluation

This section provides a synopsis of subsequent course developments that influenced the reflections of Part 3. The 1997 course could not be repeated precisely but was developed to accommodate changes in structure, staff and some teaching methods. The adjustments represent responses to the changing context and to lessons learned, as illustrated in the external examiner's report of 2002 (*Appendix 18*) and raised in Chapter Two. Aspects of the 1997 course
have thus been replicated, developed or adjusted in response to the case study conclusions.

The curriculum development process was facilitated by the ‘Facilitator’s Manual’ (Ngubane, 1998b). It attempted to capture the openness and democratic, egalitarian, critical approach of the learner-centred experience and to incorporate the lessons we learned in 1997 and 1998 to make explicit the course’s underlying philosophy in terms of content and process, which remained constant. This promoted continuity and was indeed considered a useful tool for the new course facilitator (Arbee, 1999).

Developments included new, relevant, topical content material to catalyse critical reflection, which students have consistently rated highly for their interest and capacity to relate theory to practice. The scenarios’ complexity was similarly related to current developments in the South African socio-political and economic context and students’ experience, rather than to the complexities of business. Decisions about these ‘problems’ therefore continued to draw more on students’ prior ‘common-sense’ knowledge than on extensive ‘academic’ or business knowledge. The scenarios’ purpose was similarly less to develop knowledge about how to run a business than to provide the freedom to think more openly about business-related issues. This use of subject material was quite different from the other, content-driven courses.

Course management and administrative problems were limited by the facilitator applying more focus on course plans and structure, and firmer parameters within which student choices were made, and less of what the former facilitator called a “laissez-faire” approach. While observation suggests a degree of vibrancy and dynamism in the classroom may have been lost, students have consistently rated it highly for its effective management and administration.

Feedback suggests strongly that problems of organisation and student assessment have been addressed with a workable, effective balance between
authority and democracy, and between an emergent course development
process and the constraints of an established plan, drawing on the strengths of
both creative spontaneity and firm guidelines. Students have indicated strongly
that this balance has been effective and beneficial to learning, with associated
frustrations having been largely addressed, indicating this benefit has
outweighed the cost of having lost elements of excitement observed in 1997.

The role of the facilitator in terms of role-modelling critically reflective attitudes
and promoting a learner-centred experience have, however, remained central
to the course. The facilitator’s friendly personality and democratic teaching
approach have been consistently highly rated for their capacity, for instance,
to generate trust and a ‘safe’ environment for ‘risk-taking’. Shortcomings in
1997 relating to shyer students’ participation have remained a challenge
though it appears to have been limited by careful management of teaching
techniques that accommodate different learning preferences. Similarly there
remains the challenge of enabling less confident students (generally the less
successful academically) to reflect on their learning approaches to see how to
improve them and to consult staff or other students in the process, as
discussed on page 238. Student evaluations have consistently indicated,
notwithstanding, that students have experienced the course as learner-
centred and that they have related this to enhanced learning.

Students have continued, nevertheless, to find the course relatively unhelpful in
addressing their problems with academic reading. On the other hand, problems
with irregular written work and student assessment and inadequate practice with
academic writing and the English language have been largely addressed.
Notwithstanding the limitations of a one-semester course in addressing writing
skills, the course has come to comprise more regular, short writing exercises
backed up by consistent formative assessment. Work has been meticulously
assessed for content, argument structure, use of language and referencing in
response to ongoing problems students have experienced in developing
proficiency in English and academic writing. The new facilitator has made
constant use of one-page summaries or SWOT\textsuperscript{12} analyses of complex topical business-related scenarios requiring students to report and defend their decisions.

Regular individual feedback by the facilitator, combined with peer- and self-assessment exercises, carefully researched and managed, have supported this focus. Backed by explicit aims and objectives and a grid of writing criteria negotiated with students, as guidelines, peer and self-assessment tasks have been highly rated by students for their impact on academic writing skills and English language proficiency (Arbee, 2000a, 200b). (Moreover, they may well have enhanced course coherence by providing opportunities to apply the self-critical attitudes promoted through problem posing, to their own learning contexts).

Within this context, the first-year students' examination grades relative to 'other' students have remained very good. The better performance was statistically extremely significant each year since 1997, with the statistical tests over the years indicating $\chi^2 = 215.867$, $p<0.0001$ (1997); $\chi^2 = 32.250$, $p<0.001$ (1998); $\chi^2 = 32.250$, $p<0.001$ (1999); $\chi^2 = 121.873$, $p<0.0001$ (2000); $\chi^2 = 49.998$, $p<0.001$ (2001); $\chi^2 = 268.309$, $p<0.0001$ (2002). (The calculations are in Appendices 23 - 28). Appendix 3 illustrates this even in the context of June, 2002 when structural changes meant the course had to be condensed, with less contact time and an increased (full) load of five first-year courses (Lumby 2002a) compared with the three or four of 1997. The students' academic achievements were thus one of the reasons for the Dean referring to the programme as a 'flagship' for the faculty (Lumby, 1997; 1999; 2000; 2002c). Most level 2 and 3 Accounting and BIS courses have continued to present both 'our' and 'other' students with difficulties over the years, leading to further research by two colleagues to explore the reasons and possible solutions for this.

\textsuperscript{12} Analysis of problem in terms of its strengths, weaknesses, opportunities and threats
The 1997 shortcomings relating to areas like course management and administration, teaching and assessment techniques, and inadequate opportunities to develop reading and writing skills, hence appear to have been largely addressed, enhancing course rigour and the achievement of course objectives, while maintaining a democratic, egalitarian ethos. This suggests the course has been improved and may well have become a more effective tool for teaching and learning. Improvements have been constrained, however, by the course's restriction to one semester. This is considered limiting to the course's potential impact since it restricts the development of skills like academic reading and writing in English for second language users that take time. While indications are that the course has increasingly helped students develop these skills (Arbee, 2000d, 2001, 2002), reading particularly remains a concern.

These further lessons and developments to the course since 1997 thus added a further dimension to the reflections on the case study's conclusions, as did the whole case study experience, including the incidental lessons learned through and from it and the subsequent literature explorations. In my role as reflective practitioner (Schön, 1987) or practitioner-researcher (Jarvis, 1999), questions about the whole experience confronted me. For purposes of this thesis they are conceptualised as the reflective research questions that confronted me in the second learning spiral of this study.

Reflective Research Questions

The reflective research questions confronted me as I sought to develop my thesis in answer to the main research question. Having shown in the case study that in one instance a non-traditional curriculum enabled students to achieve better academic results, these questions involved problematising this conclusion, as in Argyris and Schön's (1974) double-loop learning. At the same time the additional data gathered after 1997 and my further reading led
to the following questions:

- *Does the theory of experiential learning provide a better framework for our practice than problem-based learning?*

- *To what extent might the findings from the case study be replicable elsewhere in the faculty or the university?*

- *Can the case study findings have wider applicability?*

The first question demonstrates the recognition, flagged in Chapter Seven, that the 'Western' orientated PBL literature provided an inadequate theoretical framework for the curriculum studied, in terms of the cultural and social context for this work and the related course interests and aims. At the same time the question indicates my subsequent realisation that the approach was well documented in another body of literature: experience-based learning. In seeking to answer this question in Chapter Eight, we will see how experience-based learning theory lent support to the curriculum studied, how it could have informed the practice and therefore how it provided a more suitable theoretical framework than the PBL literature did.

The second question recognises the problem of replicating the case study findings more broadly, in view of the bureaucratic structure and culture of the University. This relates to Chapter Two's discussion on the difficulties experienced in implementing the University's transformation strategy, including its curriculum reform plan. In Chapter Nine we will consider how the nontraditional curriculum could only be replicated in the context of a changed university, and explores what this would entail, and the likelihood of this happening, hence the probability that the course could not be replicated.

The third question is concerned with whether the learning outcomes of the curriculum studied could be repeated. The question recognises the nature of case study research that has no proof of wider applicability. We will see how
Chapter Ten draws on the statistical analyses of the students' academic performance over the succeeding five years and the above discussion on changes during those years, to demonstrate that the learning outcomes were repeated in changing circumstances. This leads to the hypothesis that the curriculum might be effectively applied elsewhere and that we might, therefore, be able to generalise from the single case study. Linked to the discussion of the previous chapter, however, is the second issue around the question of the findings' applicability. Although the study might be generalisable in itself, there is some doubt that it could be replicated in practice, since the University might not be able to change enough to accommodate a non-traditional curriculum.

Having explained the relation of these reflective questions to the case study and how the questions of Part Three were posed in order to help me answer the main research question, we are now in a position to consider the first. In the next chapter we will therefore explore experience-based learning compared with PBL as a theoretical framework for the curriculum studied.
Having looked at the relation between the reflective research questions and the case study in the Introduction to Part Three and how they could each help me answer the main research question, we are now in a position to explore the first problem with which the case study presented me. In Chapter Seven, we saw that the course team referred to their teaching and learning approach as 'PBL', but that I subsequently found that the team’s holistic aims and interests, in fact, were not accommodated in the ‘Western’ oriented literature. This led to my exploring the wider literature of experience-based learning in my quest to discover if it would have provided a better theoretical framework for the learning opportunities we sought to provide, than PBL could.

This problem confronted me because of the assumptions the team had made about PBL, and the fact that the practice came before I had the opportunity to explore learning theory. The chapter demonstrates the inadequacy of PBL as a conceptual framework for the course studied and how experience-based learning theory could accommodate notions of ‘whole student’ learning, African culture and the realities of our context. We will look at how the wider theory could have informed the practice and how the course effectiveness could, in fact, be attributed to the experience-based nature of the approach. We will also see how this chapter adds a theoretical dimension to the case study conclusion that the curriculum was an effective tool for enhancing learning. It thereby strengthens the argument that we could improve the learning opportunities for our students and that the learning conditions could
affect the outcomes. To this end the chapter is divided into two sections, which are:

- PBL and the curriculum – an overview.
- Experience-based learning and the curriculum.

The first section will re-visit the problem, flagged in Chapter Seven, of having considered the learning to have been 'problem-based' when it in fact reflected a broader experience-based theoretical framework with a philosophy more 'radical' than the constructivism underpinning PBL in the literature. I will argue here, however, that there was nothing inherent in PBL theory that prohibited a more radical interpretation of PBL, but that educators for the professions, with a predominantly 'Western' instrumentalist or individualistic approach had implemented it for their purpose.

In the second section are five subsections, which are:

- Experiential learning theory – an overview.
- Biographical journeys.
- Personal empowerment: emotional and spiritual intelligence.
- Learning as a liminal experience.
- Learning through critical reflection.

These discussions will illustrate the conceptual synergies between the theory and the practice studied to show that experience-based learning would have provided a better base for thinking about the curriculum. We will see how the full range of course aims and interests were in fact reflected in experience-based learning theory and that this broader literature could have framed and informed the practice far more usefully than the PBL literature could.
Problem-based Learning and the Curriculum

The case study concluded that the course was effective in promoting practical knowledge and academic skills required of competent learners, commonly claimed by PBL in the literature, but that this framework was inadequate. It accorded with only part of the practice’s theoretical framework and purpose and some of the course objectives relating to developing skills like problem-solving, analytical thought, interactive knowledge construction, metacognition and self-directedness. The literature enriched our understandings, nevertheless, about: the value of methods like interactive, small-group learning; how to promote knowledge construction processes; how to help learners take responsibility for their learning in a faculty concerned about the diminished ‘culture of learning’ (as discussed in the case study); how to conceptualise the role of the teacher as facilitator. PBL practitioners’ enthusiasm for their approach and the breadth of experience evident in the literature, furthermore, inspired some confidence in the methodology.

The question here is why the PBL framework, as conceived in the literature, accorded only partially with our practice, recalling the curriculum’s theoretical location somewhere between Habermas’ hermeneutic or interpretive and critical or emancipatory paradigms, and its conceptualisation as radical constructivism, as discussed on page 90. Practitioners in professional education had zealously adopted PBL for the purpose of better preparing learners for their professions, with relevant practical knowledge and skills, and had claimed wide success, as shown on page 264. This resulted in broad confidence that PBL had been instrumental in significantly advancing education for the professions. In the process, however, the language of PBL, based on Dewey’s progressivism was ‘hijacked’ by the interests of these educators with their practice-based, constructivist orientation, and their links to the professions’ dominant knowledge, power and authority. They thus developed the pragmatic aspect of Dewey’s theory, ignoring his dual interest in emancipatory education, as elaborated below.
It was the different purpose for which educators for the professions had adopted progressive teaching and learning methods that made the PBL framework inadequate for the purpose of the practice studied. The more radical interests and objectives associated with personal and intellectual growth were largely absent in the PBL literature. Based on the experience of having considered our course in terms of PBL, however, I found that the concept itself, with its Deweyan origins, did not prohibit the pushing of the work- or ‘Western’-imposed boundaries, to accommodate African culture and emancipatory interests.

It was therefore possible, notwithstanding, for the case study to conclude the course was effective in promoting not only the above skills, attitudes and approaches typical of PBL practices in the literature. It had also helped students develop skills like problem posing, recognise knowledge as uncertain, value-laden, related to power and to the personal meaning learners attach to it. In travelling my own academic road, I have discovered that while PBL, as interpreted for the practice, provided a coherent framework for a radical constructivist approach, it was, in fact, extending the PBL concept as represented in the literature. A broader theory of experiential learning, of which PBL represents but one aspect would indeed have been more useful.

Largely practice-based in their reformed, progressive curricula and approaches to teaching and learning, educators for professions had come to ‘own’ the pragmatic aspect of Deweyan philosophy. When they did draw links to theory, they claimed Dewey’s (1916) pragmatism and progressivism as a foundation for their work, ignoring his emancipatory interest. Few questions were asked about what was ‘right’ (Visser and Sunter, 2002), who had decided what was ‘good’, why and for whom, and PBL had therefore been restricted to solving problems framed by the status quo and purpose of the various professions. This finding might have implications for educators for professions seeking to explore the changing responsibilities of that profession in a changing world (Reynolds, 1999; Schön, 1987), or for PBL theorists or
practitioners reflecting on their purpose. Indeed, it begs questions about the impact this kind of learning could have on future business managers in relation to the paradox within the lifelong learning discourse, raised on page 34, and the more conservative, controlling experience of PBL constrained by accepted professional knowledge.

Schön (1987), for instance, noted the above divide. He argued for "reflection-in-action" as an "epistemology of practice" alternative to what he called technical rationality associated with rule-following in professional education, thereby locating PBL in post-structural curriculum theory (Schön, 1987:35). He also recognised the need for curricula to prepare students for competent decision-making in the "indeterminate zones of practice - uncertainty, uniqueness, and value conflict" (Schön, 1987:6) and decision-making's "critical function, questioning the assumptioinal structure of knowing-in-action" (Schön, 1987:28) and its widespread absence in PBL practices. In addition he questioned the good of training students to think and act like those ensconced in the profession, advocating double-loop learning, and acknowledged problems associated with professional power in relation to other citizens. His work had particular value for this case study in the validity it gave to my more radical interest in inducing criticality.

As argued in Chapter Seven, Dewey's (1916; 1938) pragmatism, accommodating an interest in using enquiry-based learning to stimulate curiosity and empower learners as autonomous thinkers and thoughtful citizens, embraced an interest in these kinds of questions. I therefore found no contradiction in using Deweyan philosophy to frame a broader conceptualisation of PBL. Indeed it appeared to be a sensible vehicle for developing a learner-centred, egalitarian, democratic classroom experience, providing coherence between interactive learning processes; reflective attitudes towards the course, negotiating its development; and problematising issues in realistic, topical situations or debates as they arose. It held promise for catalysing 'intellectual' ways of knowing, resulting in deep, elaborated understandings of related formal, 'academic' knowledge.
With hindsight, however, having found an emancipatory course purpose to be outside the norm in PBL literature, its value to the practice was restricted to the more pragmatic aspect of using PBL to help students become competent learners and problem-solvers, developing skills, attitudes and approaches required of effective students. These course aims thus reflected those of PBL practitioners to prepare students, *inter alia* as effective doctors, nurses, teachers, managers and engineers. They were less relevant to the practice’s existential interests and the case study conclusions that much of the value of the practice lay in the ‘problems’ driving the curriculum being ‘bigger’ than those raised through the practical scenarios. They represented an attempt to provide a whole learning experience relevant to learners’ prior experience that included, but went beyond, learning problem-solving skills to enhance new knowledge and the kind of self-confidence demanded by the professions.

The case study’s conclusions that students’ learned to take ‘risks’ in exploring new knowledge and democratic processes thus suggested a growth in self-worth and emotional well-being that accorded with Goleman’s (1996) emotional intelligence, but was absent in the claims for PBL, as discussed in Chapter Seven. On the other hand, however, conclusions about the value of the ‘safe’, nurturing, learner-centred environment, so integral to the curriculum in enhancing learning, suggest that PBL could indeed be interpreted as a frame for emancipatory purposes. There was nothing incoherent about the practice embracing existential concerns with the existing social and cultural realities and the problem-posing it begged (Greene, 1974), even though this went beyond the purposes of educators for the professions.

The different slant placed on Deweyan progressivism was thus accommodated within this interpretation of PBL, contributing to the course’s effectiveness. Thus the literature’s limited value for the practice’s purpose was less a function of PBL representing an inappropriate conceptual framework, since all learning could be considered problem-based. The problem was more that the concept had been monopolised as a progressive
mode of enhancing teaching and learning for specific pragmatic purposes. This made the PBL literature inadequate in that it informed only part of the practice’s interests.

The problem of having assumed the PBL literature would help legitimate the case study’s findings was related to the haste in which we worked. This illustrates my inexperience at this early stage of my personal journey as a practitioner-researcher and warns of lost opportunities to learn from a broader, more inclusive conceptual framework more fitting to the practice’s range of aims.

**Experience-based Learning and the Curriculum**

Although the term, experiential learning, was scarcely used during the course development process, the broad concept with its diverse meanings and usages was later found to have underpinned the practice. The conclusions, in fact, accorded strongly with the claims and interests of experiential learning, arguing for its validity in the context of the case study. This demonstrates that PBL is one aspect of experiential learning theory, fitting within this broader conceptualisation of learning. I explore this relationship below, to argue that the case study and theoretical underpinnings of the practice closely reflected many of the interests, aims and methods of experiential learning and that it was these that made the practice effective. At the same time an experiential learning conceptual framework, with its informative and challenging literature, would have strengthened it.

**Experiential Learning Theory – an overview**

This section presents a brief overview of experiential learning and the claims made, in relation to the case study’s conclusions, particularly those that pushed the boundaries of PBL.
Experiential learning has emerged from various educational traditions and has a long history in education (Jarvis et al, 1998). Drawing on Miller and Boud (1996) they offer the following principles of experiential learning:

- Experience is the foundation of, and stimulus for, learning
- Learners actively construct their own experience
- Learning is holistic
- Learning is socially and culturally constructed
- Learning is influenced by the socio-economic context within which it occurs

(Jarvis et al, 1998: 46)

The focus thus is on “exactly how people learn what they learn through experience and from experience” (Gregory, 2002a:94) recognising that “learning begins with experiences for which (learners) have no pre-set responses” and cannot respond without thinking (Jarvis, 1992a:15). Learning experiences include what Henry (1989) categorised as independent learning, personal development, social change, non-traditional education, learning by doing and PBL, and experiential learning involves “creating and transforming experience into knowledge, skills, attitudes, values, emotions, beliefs and senses” and learners “becoming themselves” (Jarvis, et al, 1998:46).

Recognising the centrality of learners’ existential realities to their capacity to learn, it seeks to help them make sense of the different aspects of their lives and to take responsibility for related actions (Henry, 1989). In the case of this study, for instance, students straddled two very different cultures, often with two conflicting sets of demands. In order to avoid this affecting negatively their learning they had to be given space to make personal sense of them, to foreground the strengths of African culture and to take responsibility for their actions, as elaborated on page 326.

Experiential learning hence draws on different traditions and terminologies and reflects an epistemological interest in areas like emancipatory education,
transformative learning, action learning, reflective learning, reflection-in-action, adult learning theory, focusing on criticality, consciousness-raising and personal, emotional and spiritual development. It incorporates aims to develop skills in, for instance, self-discovery, decision-making, transferring knowledge, relating it to different disciplines, prior knowledge and experience, clarifying values, and qualities like initiative, other-centredness, self-confidence, flexibility and tolerance for different viewpoints. The value of experiential teaching and learning, particularly relevant here, lies in the broad framework that enables curricula and teaching methods to incorporate humanistic concerns and affective aspects like feeling, sensing and the emotions. The approach recognises their role in enhancing self-directedness and personal empowerment and their relationship to critical reflexivity and problem-posing (Boucouvalas, 1993; Brookfield, 1996; Boud, Keogh and Walker, 1985; Clark, 1993; Freire, 1994; Gregory, 2002a; Heimlich and Norland, 1994; Henry, 1989; Järvinen, 1989; Jarvis, 1987, 1992a; Jarvis et al., 1998; Kolb, 1984; Marsick, 1990; Merriam, 1993; Mezirow, 1990a, 1990b, 1995; Preece and Griffin, 2002; Schön, 1983; Weil and McGill, 1989; Thompson, 1983; Tisdell, 1993).

Gregory’s (2002a) experiential learning principles reflected roots in Dewey’s progressivism and interest *inter alia* in emancipatory and holistic education, providing a useful theoretical framework and language to explore here what it was in the practice that made it ‘work’. They are considered in terms of the above interests, aims and questions about the practice’s effectiveness in promoting deeply processed, elaborated knowledge. The focus on learning through and from experience and educating the whole person in the above broadly inclusive experiential learning literature, thus reflects a synergy of interests and focuses with the practice and conclusions of the case study.

Experiential teaching and learning principles could have provided, in fact, a useful frame of reference for the practice’s interest in the sociological and philosophical aspect of learning theory aside from the psychological (Boud, Keogh and Walker, 1985; Gregory, 2002a; Henry, 1998; Jarvis, 1987; Kolb,
Such a framework could have accommodated our aim to promote learning through providing a disjuncture between the learners’ experience and the practical situation confronting them (Dewey, 1938; Jarvis, 1987) or Mezirow’s ‘disorientating dilemma’ linking to Vygotsky’s idea of working within a learner’s ‘zone of proximal development’ (Jarvis, 1987; Jarvis et al, 1998). It could have embraced and challenged the course’s emancipatory underpinnings, endorsing the existential basis of course aims and objectives, their links with learners’ emotional needs and life experiences, past and current (Brookfield, 1996) and drawn on Van Gennep’s (1960) concept of liminality, as elaborated on page 335.

A broader learning theory could indeed have provided a language for interrogating the students’ experience of working within a cultural and educational hiatus and framed our aim to promote personal empowerment and power sharing through the curriculum (Gregory, 2002a; Jarvis, 1987; 2002a). Likewise it could have supported and augmented thinking about the ‘political’ relation between rich learning experiences and enhanced student autonomy and self-directedness, and the role of reflecting critically and examining assumptions underpinning accepted knowledge (Brookfield, 1996). Experiential curriculum principles could thus have informed conclusions about the relation between deep processing and elaboration of knowledge and intellectual growth as a ‘political’ response to the realities of the socio-political context (Gregory, 2002a; Mezirow, 1995).

The literature could also have usefully informed the notion of exposing students to a shared, liminal, primary learning experience. These concepts could have guided our plans to give opportunities for taking risks in thinking autonomously, making informed choices, accommodating new knowledge, within existing world views or frames of reference, or developing their structures of meaning (Mezirow, 1995) to incorporate new understandings. Relevant literature could have supported and enhanced our understandings about the need for learners to reflect on assumptions underpinning their beliefs and cultures, to inform such choices and the way they related to
dominant knowledge and 'Western' culture, and to peers and staff as co-
learners. It could have framed understandings of the role of democratic
teaching styles in ensuring interactive knowledge constructing processes were
indeed critically stimulating and not insidiously oppressive or manipulative
(Brookfield, 1996; Jarvis, 1992a; 2002a; Weil and McGill, 1989). At the same
time it could have informed and enhanced my role as practitioner-researcher
(Gregory, 2002a; Jarvis, 1999) by providing criteria to guide the critically
reflective processes through which I sought to assess the work's strengths
and limitations.

In terms of experiential teaching and learning principles' potential to provide a
fitting conceptual framework, the case study's location within PBL thus
represented theoretical constraints and missed learning opportunities.
Although PBL provided a useful baseline for our curriculum theory it was
problematic that the literature did not reflect all our interests. Being practice-
based, and therefore, to an extent, reproductive in nature, it did not
accommodate our interest in enabling students to step beyond the bounds of
culture through providing a liminal learning experience, as discussed on page
335. On the other hand, although the experiential curriculum discourse was
largely absent in our course development plans, there was a great deal of
synergy between the practice's underlying philosophy, the case study's
conclusions and the experiential learning literature. This suggests the claims
for experiential learning were justified in the context of the practice and its
effectiveness was related to the curriculum's unarticulated experiential
learning underpinnings.

The sections below draw on the case study's conclusions and subsequent
reflections to consider what it was that made the practice effective. I explore
this question through examining the relevance of the case study conclusions
to four fundamental experiential learning principles. This involves first, the
practice's potential to enhance learning through recognising its relation to
learners' intellectual journeys or biographies. Second, I explore its capacity to
address existential problems, especially recognising the need for personally
empowering learners. Third, I focus on possibilities for conceptualising the learning experience as a liminal experience and fourth, on the practice's ability to promote critically reflective attitudes and approaches to knowledge.

We will thus consider the relationship between experience-based learning and deep processing and elaboration of knowledge, personal meaning making, free thought and social awareness. I will thereby argue that the practice's effectiveness was related closely to these experiential learning principles and their underlying philosophy.

**Biographical journeys**

Lessons were learned about the value of conceptualising learning as biography (Dominicé, 2000) where new knowledge impacted meaningfully on the way learners saw the world. Content was found effective when it related to learners' prior knowledge, culture and experience, and thus was accessible, but at the same time provided a disjuncture in their experience, conscious and unconscious, or a disorientating dilemma that promoted critical reflection (Jarvis, 1987; 1998). It was therefore valued for its capacity to help students interrogate prior and new knowledge, to make personal sense of it, accommodating current thinking within their developing conceptual frameworks, on their individual journeys of learning. This recalls my argument for the value of knowledge that is 'believed' and therefore 'owned' rather than understood in a 'separate' or 'academic' sense for the purpose of passing examinations.

The thesis is, in fact, concerned with various levels of experiential learning, including my personal academic journey as a reflective practitioner and researcher referred to in the Introduction, and the individual biographies of both course team members and students. For my colleagues and me, the case study framed a learning experience in both the immediate context of work with the course and students, involving our team interaction through
ongoing critical reflection and deliberation, and within the broader context of curriculum reform in a university trying to cope with change. For me it clearly provided a learning situation in a very significant stage of my development as a practitioner-researcher, allowing me to ask further questions that resulted in the work being transferred to a doctoral study.

The course development and evaluation processes also provided an out-of-the ordinary learning experience in the journeys of both staff and students. Research was experienced as a democratic, inclusive, non-élitist, iterative learning process (Jarvis, 1999), a point to be pursued in terms of the framework for curriculum reform provided by the University's strategic plan discussed in Chapter Two. Evaluation processes were conceived as part of the course development processes and an extension of the teaching and learning experience. Indeed strengthening the case study was the coherence between the research and teaching and learning methods, driven by the same theoretical underpinnings.

Conceptualising learning as biography meant recognising it as “the sum total of experiences that have helped to shape a human person” (Jarvis et al, 1998:56), or an approach that focuses on “the subjective meanings and the developmental process” of learning, to help learners “deepen their understanding of their own ways of learning and of their existing knowledge” (Dominicé, 2000:xv). These emphases were acknowledged to have influenced positively the practice and case study. The students, for instance, provided both fun and challenge to us as practitioners; fine young people with immense zest for life, and determination to face enormous cognitive and emotional challenges, as elaborated below, to put the past behind them and 'succeed'. They, with their array of life experiences and dreams, were a source of ongoing energy and learning to us in our resolve to find ways of meeting their needs.

The case study concluded that students' learning through and from the practice had been promoted through the learner-centred nature of the
experience. On the one hand it involved their co-learner role in a relatively democratic, egalitarian and supportive environment; on the other, content, teaching and learning processes selected for their relevance to learners' biographies. It related this to personal and intellectual growth through increased learner interest, reflection, discussion and therefore personal meaning making in and outside the classroom. This suggested the effectiveness of involving students as co-learners both about the course and within it in the context of new learning experiences. It suggested also the effectiveness of the curriculum and teaching style that had helped students move away from the teacher-centred, knowledge-reproducing school experience to develop new critically reflective ways of knowing through interactive knowledge construction processes. Such development represented disjunctures in their individual biographies in terms of confronting new assumptions about learning and knowledge, accommodating multiple perspectives and new relations to authority (Hart, 1990; Henry, 1989; Järvinen, 1989; Jarvis, 1987; 1992; Marsick, 1990; Mezirow, 1990). They represented new learning experiences that relied on stimulating interest and independent thought relating to both what and how learning was taking place. Through exposing, for instance, a lack of knowledge for addressing a 'problem', a lack of self-confidence in expressing their views or a difference of opinion on the best approach to learning in a specific situation, these experiences demanded a new kind of learning.

Conceptualising learning and personal growth as the outcome of mastering a disjuncture between experience and biography (Jarvis, 1987; Jarvis et al, 1998) was thus an aspect of the practice that made it effective. Had the approach been articulated in this way the literature could, furthermore, have usefully informed and challenged both practice and case study. Nevertheless the conclusions accord with claims made in the literature that biography is inseparable from learners' specific socio-political and cultural context. This is demonstrated through the conclusion that the focus on existential realities common to our learners' biographies was fundamental to the practice's
effectiveness in enhancing intellectual and personal growth, the latter being the focus of specific reflection below.

**Personal Empowerment – emotional and spiritual intelligence**

This section argues that the students' personal empowerment, as found in the case study, contributed a great deal to their intellectual development and therefore to the practice's effectiveness. The practice could have been further enhanced, however, by the literature on experiential learning. Our experience demonstrates synergy, for instance, amongst the case-study, experiential learning and work on emotional and spiritual intelligence and radical feminism (Goleman, 1996; Hart, 1990; Tisdell, 1993; Zohar and Marshall, 2000).

The case study concluded that the students' emotional well being was crucial in promoting this new kind of learning and a critically reflective relation to knowledge. It found, moreover, that this approach was relevant to the above existential aspect of the practice, with its focus on learners' needs in the South African context of the time. An element of the practice found to contribute a great deal to its effectiveness was thus the focus on learners' personal empowerment. This reflected some of the ideas Goleman (1996) was publishing at the time on emotional intelligence and their relevance to the practice's emotionally fraught context. The 'whole student' philosophy, integrating emotional and cognitive needs accorded with the Student Development Model on page 164, highlighted the key role of a deep sense of self-worth in learning, particularly in learners from dominated cultures. The case study indicated strongly the relation between personal and intellectual empowerment. Lessons were learned about the value of enabling students to develop and articulate understandings about accepted knowledge in relation to prior knowledge, experience, beliefs and values (Makgoba, 2002a; Moodie, 2002; Nkwhevha, 2000; Odora Hoppers, 2000).
Seventeen and eighteen-year-old students were faced, for instance, with the complexities of spanning two cultures with often conflicting demands and expectations. They had to make sense of them, reach decisions accordingly and act on these decisions. Their histories included extraordinary accounts of coping with adversity, from acute financial poverty to emotional deprivation to moral and spiritual challenges. Decisions had to be made on the one hand about cultural traditions and beliefs and on the other about socio-economic realities and their relationship with 'Western' university culture and the relative comfort of university life.

There was the case, for instance, of the student who finally gave in to what he experienced as an irresistible 'calling' to become an 'inyanga' or traditional healer, reluctantly taking a year off his studies before returning to complete his degree, majoring in Accountancy. There was also a case of a student born to a family of 'sangomas' or 'witch-doctors'. He turned Christian and struggled to counter, with his faith, the pressure from his family and community, to drop his studies and follow his 'calling'. He experienced their 'bewitching' and the call of his ancestors, as acute physical pain, and the alienation from family as emotionally traumatic. While persisting with his studies, his academic performance declined and the continuation of his bursary is currently threatened. There were innumerable cases, on the other hand, of students skimping on meals and books in order to send bursary money home. At the other end of the scale were the temptations of 'Western' trappings like 'designer-label' clothing, entertainment and 'fast food'. Decisions had to be made and lessons learned as students were challenged by existential realities like these amidst their academic challenges.

The traditional concept of 'ubuntu', defined on page 35 was indeed tested. Quite early in the course, students raised the issue of competitiveness in relation to discussions on the effectiveness of study groups. There were complaints that some students were reluctant to 'share' their understandings with others, out of a sense of self-interest and with the intention of outperforming other members of the class. Finally they agreed on the concept
of 'friendly competition' and the need to support one another, reflecting their solution to accommodating both 'Western' and African culture. With each subsequent cohort of students this issue has arisen and been worked through in different ways according to particular dynamics of the group. (The 2001 and 2002 cohorts have, in fact, experienced the most difficulty in reaching an agreed ethos, probably indicating the increasing degree to which they have incorporated 'Western' values of individualism and competition, possibly at the expense of emotional and spiritual maturity). This highlights the need for the curriculum to raise issues of African culture in terms of a critique on 'Western' values. This includes foregrounding the cultural wealth of reaching consensus, of sharing and 'ubuntu' in contrast to the social realities of 'Western' self-centredness, in the context of African society growing away from its cultural roots.

Had Goleman (1996) and Zohar and Marshall (2000) written earlier, and had there been time to access such literature, their writing could, indeed, have provided a useful frame of reference for this work. It could have provided a means of conceptualising this aspect of the practice and, therefore, enhanced reflections on the role of emotional and spiritual intelligence in learning. At the same time the interest in radical feminism literature on the personal empowerment of marginalised groups could have strengthened the work (Barr, 1999 according to Preece and Griffin, 2002; Hart, 1990; Hooks, 1994; Kenway and Modra, 1992; Lather, 1991; Thompson, 1983; Tisdell, 1993).

The literature could have informed the conceptualisation and planning of a learning experience to help counter the stress inherent in the above kinds of realities and in simply being a Black African with a particular biography and disempowering socialisation, entering an almost 'white' university of 'Western'-dominated culture. It could thereby have enhanced the practice’s effectiveness. Goleman's (1996) work supported the case study's conclusions about the links between emotional well being, developing social and communication skills and overcoming timidity in the context of enhancing learning. His recognition of different personality types also reflected
conclusions about a shortcoming in the practice in terms of difficulties of engaging shyer students in interactive processes and could have informed the practice. Goleman’s (1996:268) work thus accorded with case study conclusions, providing a language for the valuing of “empathy” in a curriculum experience as key to “social ability” and emotional intelligence. Indeed his work accords with the programme’s initial early 1990s focus on helping a very small minority group of marginalised students learn in an ‘alien’, hegemonic environment, before the personal empowerment aspect was formally integrated in the curriculum. The case study conclusions suggest that, by 1997, this aspect had been effectively implemented as one of the three interdependent ‘legs’ of the practice, crucial to learners’ intellectual development. Strengthening the argument for the value of personal empowerment in enhancing learning is the anecdotal evidence from early 1990s course evaluations. They indicated that the students of these years attributed their academic achievements (good but less remarkable than those of latter years), largely to the self-confidence they developed through the whole learning experience.

A 1993 letter of ‘evaluation’ from one of the students in his final year of undergraduate studies is attached to illustrate the perceived link between relatively good grades and self-confidence, boldness and self-pride (Appendix 20). Nine years later, having been appointed a partner in one of the major international accounting firms, he confirmed his early view that his successes could largely be attributed to the personally empowering experience provided by the programme (Gwala, 2002). Since, at this time the academic programme lacked a theoretically integrated approach, it highlighted the role of the nurturing, emotionally supportive environment in enhancing learning, supporting the case study’s conclusions. At the same time this experience indicates an area for future research, with potential research theses based on the life stories of our learners.

Just as the case study incorporated the concept but did not use the language of experiential learning, so it did not speak of ‘emotional intelligence’.
Nevertheless, it concluded the course's effectiveness was related to the provision of empathy and a 'safe' nurturing, learner-centred environment of mutual trust (Jarvis, 1987; Mezirow 1990b, 1995). It found a relation between learner-centredness and students’ critical interests and capacities to explore ideas, examine assumptions underpinning prior knowledge and experiences, testing them in the light of new knowledge, thereby demonstrating openness to different perspectives and to developing new understandings and structures of meaning. At the same time, an environment that provided modelling of, and practice in, accommodating different perspectives (very relevant in the practice’s context as discussed on page 48) was found to enhance learning.

The case study found that students experienced the practice as personally empowering helping them to think for themselves, defend their views and learn from others’ perspectives. In Goleman’s terms personal empowerment was related to emotional intelligence which was thus found to have played a role in promoting learning and the other-centredness required in democratic learning processes and a critical interest in issues of morality and social justice. Thus the work would have been enriched by Goleman’s psychological perspective when he supported *inter alia* the aim to promote an interest and excitement about learning and a caring community, bringing to bear his notion of the role of empathy and its description as

understanding others’ feelings and taking their perspective, and respecting differences in how people feel about things. Relationships are a major focus, including learning to be a good listener and question-asker; distinguishing between what someone says or does and your own reactions and judgments; being assertive rather than angry or passive; and learning the arts of cooperation, conflict resolution, and negotiating compromise

(Goleman, 1996:268).

Drawing on Dewey, Goleman (1996) linked emotional intelligence to learning about morality and democratic processes through experience rather than
theoretical lessons and the benefits to society that are possible when its citizens have learned an ‘other-centredness’. From his point of reference he thereby supported the case study’s conclusions that the learner-centred environment promoted not only self-worth, self-awareness and self-directedness but also respect for difference and social awareness through opportunities for students to experience democratic decision-making processes in attempts to resolve complex, realistic, topical socio-political issues. By similarly relating ‘emotional intelligence’ to “intellectual potential” Goleman (1996:xii) could indeed have enriched the case study’s conceptual framework.

Extending the concept further is the subsequent work of Zohar and Marshall (2000:4) who argued that ‘spiritual intelligence’ was what enabled people to make meaning of their lives, contextualising their actions and lives “in a wider, richer, meaning-giving context”, choosing personally meaningful life-paths. It linked to Goleman’s idea of overcoming powerlessness and the case study’s conclusions that the practice helped learners emerge from the limitations placed on them by their existential problems. This work thus also provided a language for conceptualising how learners could be empowered to “transcend the gap between self and other” (Zohar and Marshall, 2000:14), a concept that could have been related to ‘ubuntu’ in terms of a critique on ‘Western’ culture.

Relevant to the above, is the literature on radical feminist pedagogy that recognises the dependence of the culturally marginalised on authority, for knowledge. It similarly argues for the value of promoting critical reflection and a sense of authentic knowing; of developing individual identities as well as collective ones, emotional well-being as well as critical consciousness of hegemony, in empowering marginalised learners (Hart, 1990; Loughlin and Mott, 1992, drawing on Belenky, Clinchy, Goldberger and Tarule, 1986; Mezirow, 1995; Preece and Griffin, 2002; Tisdell, 1993; Thompson, 1983). Furthermore the literature’s recognition of different ‘ways of knowing’ accords with this study’s interest in ‘intellectual’ ways of knowing. Baskett and Marsick, drawing on Belenky, Clinchy, Goldberger and Tarule, 1986 (1992:2)
argue that recognising different ways of knowing suggests that “learning is something in process ... that there is something other than received knowledge, that learners ... make unique sense out of their experiences and that people can be active in creating new (for them) understandings and hence knowledge”.

The feminist literature thus accords with the case study's linking of individual and political empowerment in terms of its conclusions that intellectual growth and a critical relation to knowledge were related to personal empowerment. It could have provided a language and framework to locate the position adopted in the practice under study that sought to ‘indoctrinate’ only insofar as to promote critical reflection as a ‘good’. We similarly sought to avoid influencing viewpoints aiming to enable but not to require students to become agents for social transformation.

Recognising the difficulties students would face, for instance, in terms of the dominant business culture, the practice sought to empower students to choose if and when to challenge the status quo. The immediate interest of the practice was to promote personal empowerment, criticality and social awareness as indicated in the conclusion, to raise learners’ consciousness about power-related knowledge, to recognise hegemony for what it was, and to resist seeing problems as personal shortcomings (Hart, 1990; Jarvis, 1992a; Thompson, 1997).

The above interest recognised that social transformation occurred in diverse ways and places, that social awareness and clarity of thought was vital to change agents (Mezirow, 1995). This suggests a further research area in terms of whether and how, as business people, and graduates, our students accommodated social transformation issues within their business decisions and personal conceptual frameworks, or the extent to which they saw themselves as change agents. Relevant here, also, was our interest in promoting a sense of community consciousness amidst signs, on the one hand, of diminishing social awareness and ‘ubuntu’ and increasing self-
interest, as discussed on page 94. On the other hand there were numerous indications, elaborated below, of our students 'other-centredness' involving themselves in activities to 'give back' through supporting new students and communities outside the University.

Mezirow (1990a, 1995) could have informed the practice in terms of its emancipatory or transformative interests, discussed above in relation to radical feminist pedagogy and social transformation. His conceptualisation of transformative learning represented learners' developing new understandings of themselves, their values and priorities. He would have provided a language for considering the impact of such self-awareness on personal empowerment, the role of personal transformation in enabling social transformation so badly needed in our context and the ethical problems of deciding for learners that they should become change agents.

The case study found, for instance, that problem posing within critically reflective learning processes led to consciousness-raising in terms of social awareness and interest. Students demonstrated their sense of community in a number of ways. By the end of their first year, for instance, about 80% of the class have applied annually to be student mentors for the next year's intake. Each year's mentor development workshop has demonstrated students' concern to help the new students adjust to university life, to improve on, and avoid the pitfalls of, their orientation experience. They worked hard in the two-week orientation to make the experience a fruitful one and thereafter took responsibility for mentoring the newcomers. Many of our mentors continued their mentoring throughout their undergraduate studies, providing role-models for younger students and, by all reports, affecting very positively their experience, both socially and academically. They helped the students in their studies and many senior students participated actively in the University's 'Residence Tutorial' initiative, helping all students in trouble with their work. At the same time some of our students have initiated 'Winter Schools' during the holidays for poor schools in their communities, while others have initiated Saturday classes for local needy schools. They have thus demonstrated a fair
degree of community activism, a point pursued on page 365, in relation to the leadership they have developed through participating in democratic programme structures.

The practice thus accorded with Mezirow's (1990a, 1995) transformative interest through its intent to focus not on what students thought, or the decisions they reached, but on encouraging them to think for themselves. We aimed to enable students to make sense of situations in their own terms and to integrate new understandings coherently within their personal conceptual frameworks. They were, after all, going to have to make their own sense of the country's transformation and the role they would play in it.

The case study showed how course content promoted critical, social awareness and demonstrated the link between pondering controversial problems, raising issues of social justice and intellectual empowerment. At the same time these attitudes and capacities were linked directly to students' personal empowerment and learning within a learner-centred environment. The study thus further validated claims about experiential learning. The learner-centredness was related to the selection of content material and teaching methods and the provision of a relatively democratic classroom experience and egalitarian relationship with staff. Selected for its capacity to spark interest, analysis, critical reflection and debate about issues that mattered in learners' lives, both academic and social, the content was found to have been effective in promoting personal, academic and intellectual growth, as illustrated in the Student Development Model on page 164. At the same time the teaching methods, discussed on page 175, were found to help students make sense of new knowledge through grappling with related issues. The decision-making process ensured that they integrated new understandings within their personal conceptual frameworks so that it would live on in their minds.

The learner-centredness was also found to enhance learning by allowing learners to experience for themselves, where, when and how democratic
processes worked or did not work, and therefore to make personal sense of them. In contrast to a mediated ‘secondary experience’ of being told about how such processes worked, the actual or ‘primary experience’ (Jarvis, 1987; 1992a) of learners adopting roles in such decision-making processes were found to provide valuable learning opportunities. They enabled learners to think clearly and autonomously about them, problematising both the processes themselves and content issues that arose. The processes were found to be both personally and intellectually empowering in the opportunities they provided for enhancing self-identities, accommodating difference in co-learners and critically reflecting on knowledge.

The conclusions thus justified experiential learning as an effective approach to teaching and learning. At the same time the practice could have been enhanced by this conceptual framework which could have made explicit the concept of an actual or ‘primary’ learning experience, meaning the whole learning environment and culture in contrast to a mediated or ‘secondary’ experience (Jarvis, 1987; 1992a). The theory-based recognition that people learn far more easily from what they experience than from what they are told, would have supported and strengthened the curriculum. Similarly resonating with the practice was the notion that learning is enhanced when learners have opportunities to experience situations for themselves, learning as a matter of course as they “impose their own meanings on them” (Jarvis, 1987:72). At the same time the concept of unintended or incidental learning (Jarvis, 1987, 1992a; Marsick and Watkins, 1990) could have informed our work.

Much of what made the curriculum of the practice effective was thus related to promoting personal and intellectual empowerment and was found to accord closely with the claims and interests of experiential learning. In its terms the conclusions pointed to the value of recognising the role in learning of promoting self-identities and personal growth, particularly of socially or educationally marginalised learners. They indicated also the role of a ‘primary’ learning experience in highlighting cultural values while enhancing
personal growth, criticality and 'intellectual' relations to knowledge and learning.

**Learning as a Liminal Experience**

The case study found a fundamental strength of the practice to be its existential orientation. The supportive, learner-centred experience and related teaching methods were found to help students deal with the 'culture-shock' confronting students. Learning was promoted in the context of their sudden exposure to a different kind of education, with its different conception of knowledge and learning, new egalitarian relationships and democratic processes and first experience of an English-speaking, almost entirely 'white', 'West-dominated' culture and urban environment. In a sense the university context itself could be seen as providing all students with a liminal experience with its sets of rules, relationships and interests that set it apart from school, home and work experiences.

The practice was found, moreover, to be effective in helping the learners shift from educational approaches and understandings with which they were familiar and which had 'worked' for them at school. It recognised the anxieties involved in the transition, and the trust and self-confidence required in accepting that former reproductive, non-reflective approaches and understandings that knowledge was fixed and certain, residing in the heads of knowledgeable (and powerful) authorities, were inadequate in this context. The case study concluded that the learners experienced the practice as appropriately supportive and nurturing. Moreover they were found to have adjusted to becoming themselves authors of knowledge, capable of critically reflecting on given knowledge and challenging it and their teachers. This involved setting aside, in this context, traditional cultural behaviour with its taboo of questioning authority or relating to their elders as 'equals', relatively speaking.
The case study revealed, incidentally, that the invitation to use first names of staff caused reactions ranging from surprise, amusement, embarrassment, avoidance and easy compliance. It was noticeably easier for students to make this cultural shift in relating to people from outside their culture, that is the white staff members, presumably because that was a new and strange experience whatever names, or mode of address, they used. On the other hand, calling black African staff by their first names meant 'reframing' the concept of respect and was almost entirely avoided by preceding the first name with a title denoting both familiarity and respect in African culture. From this it may be extrapolated that, assuming a 'safe', supportive environment, the learners' degree of openness to changing habitual thought patterns and behaviour was related to the degree of unfamiliarity or 'instability' in the learning environment.

What was important was the effectiveness found in helping students make the transition to relating differently to knowledge through promoting personal and intellectual growth. In terms of the practice's existential orientation, sociological underpinnings and learner-centredness, its effectiveness could be attributed to having understood the experience as a 'rite of passage', or liminal experience (Van Gennep, 1960), having removed learners from familiar constraints of social and educational cultures and structures and their identities within them. The supportive, open environment was found to help students come to terms with the unfamiliar, with opportunities to take in a new set of realities almost opposite to previous experience, and to develop new identities and approaches to learning relevant to their new learning context. This conclusion was supported by Brown's (2002) argument that learners learn better without the constraints of bureaucratic structures, where there is a climate for thought and questioning and Tosey's (2002) argument, drawing on Heron, for a learning community.

The conclusions thus point to the fundamental value of having used a social, cultural and educational hiatus in freeing the students to think openly. It could also help them overcome the fear inherent in such freedom, and the
uncertainties in the transition from the educational, social and cultural known to the unknown. A wider literature than that underpinning the case study could have informed the concept of providing a liminal experience to promote transformational or transformative learning (Clark, 1993; Mezirow, 1990a) by relating it, for instance, to the notion of the creative ‘edge’ between order and chaos in chaos theory. It could have helped locate learning somewhere “between knowing comfortably” about what was to be learned and “being totally lost” (Zohar and Marshall, 2000:13), recalling Vygotsky’s argument for learning from disharmony or disjuncture (Jarvis, 1992a) within a ‘zone of proximal development’ (Jarvis, 1987; William, 1995).

The literature supported the conclusion that conceptualising the nurturing, supportive, safe environment as a liminal learning experience was a fundamental element of what made the practice effective. It could indeed have framed and thereby strengthened the practice. Furthermore, it could have provided a language for considering the notion that the intellectual shift would create instability, and some fear inherent in the new freedom. It would therefore demand courage in the learners and competent, skilled facilitation, support and mutual trust in overcoming the related threats. Moreover, it could have framed considerations of how learners need to be willing to feel uncomfortable, to flounder and make mistakes, to risk exposure of difference or ignorance, to feel uncertain about things never questioned before. They need to undergo these challenging processes to enable them to adjust their views, examine and re-think or defend personal values or beliefs (Heron, according to Gregory, 2002b; Tosey, 2002) in their ‘truth-seeking’ (Barnett, 1990; Jarvis, 2001).

Zohar and Marshall (2000:197) also provided a language for this in terms of spiritual intelligence which they argued developed through the constant “re-wiring” of the brain in response to experience, integrating new experience into existing personal understandings, reframing and recontextualising meaning and transforming understandings.
The conceptualisation of the curriculum and approaches to teaching and learning as part of a liminal experience was thus found to have been significantly instrumental in making the practice effective. It was found to have promoted learning through both personal and intellectual empowerment, and the latter aspect is further explored in terms of learners' criticality.

**Learning through Critical Reflection**

While the practice's effectiveness has been attributed above to its capacity to promote criticality in respect of its links to personal empowerment, this discussion focuses on conclusions more directly related to questions about the extent to which students developed 'intellectual' critically reflective attitudes and approaches to knowledge and learning.

From the comparative course grades the case study strongly concluded that students had developed a relatively 'intellectual' relation to knowledge and learning. It related this to students having deeply processed and elaborated knowledge through problematising understandings and perspectives. The lecturers confirmed this relationship through comments about how much they enjoyed teaching 'our' students because of the quality of 'our' students' questions, compared with 'others', their relevant, challenging input in discussions and their general attitude to learning, as discussed on page 247.

These findings thus pushed the problem-solving boundaries of the PBL literature to incorporate some fundamental problematising of assumptions underpinning those 'problems'. The case study found that the practice's effectiveness was related not only to the academic competence promoted through solving realistic problems and practising skills like analysis, reasoning, problem-solving and communication, but also to critically reflecting on issues arising within that situation. This involved examining the assumptions on which accepted, dominant knowledge was based, learners' personal beliefs and understandings and those of their peers, which the study concluded to be
essential in promoting deep levels of understanding and capacities to elaborate knowledge, making personal sense of it. Thus lessons were learned about the value of conceptualising the 'problem' in realistic contexts that had no 'holy cows' and which provided a platform for free thinking with no pre-decided 'solutions'. They could include fundamental questioning about the role of business, for instance, in contributing to a more socially just and equitable world and a more sustainable natural and social environment (Reynolds, 1999; Visser and Sunter, 2002). They could thus provoke thought beyond the confines of, for instance, developing optimal business practice in order to grow the business. This begs questions, nevertheless, about how this approach would impact on our students' future experience as managers, whether they would find a conservative business environment more frustrating than challenging, as raised on pages 34 and 315.

The above conclusions validated the claims of the broader literature on experiential learning, since this aspect of the practice was found to be a crucial 'leg' to its effectiveness. While reproductive learning can be entirely appropriate in certain circumstances and can indeed be underpinned by democratic teaching styles, the authoritarian school education, as discussed on page 37, had limited learners' freedom to think and question (Jarvis, 1987). The above findings thus represented a conceptual leap for the learners in the requirement that they re-orient themselves in terms of the way they related to knowledge. Indeed the case study revealed that students found it difficult and frustrating to make this shift, to accept that there is often no one 'right' answer to problems. Once they had recognised the subjective, value-laden nature of knowledge, however, they identified this shift as an important step in developing an effective approach to learning and knowledge.

The case study concluded that an important contributor to learners' criticality was the staff's role-modelling of critically reflective processes and attitudes. We engaged students in ongoing self-reflexive course development and evaluation processes, as co-learners, demonstrating criticality and openness to, indeed hunger for, criticism as a means of enhancing understandings.
about critical reflexivity as a questioning attitude. (Indeed this finding suggested the possibility of limiting the shortcoming of the research method associated with its dependence on student opinion). Thus students comprised a vital part of the programme’s critical community.

On the other hand the study found the facilitator an effective role-model in terms of his personal ‘intellectual’ relation to knowledge, critically reflective attitude, openness to problematising accepted knowledge and enjoyment of debate without imposing personally-held beliefs on the outcome. While role-modelling these processes, he provided a ‘primary’ democratic teaching and learning experience (Brockbank and McGill, 1998; Brookfield, 1996; Gregory, 2002; Jarvis, 1992) with egalitarian classroom relationships. It involved also the learners’ experience of a ‘safe’ classroom environment of mutual trust, with teaching and learning methods that promoted active participation in critically reflective knowledge construction processes, both within and about the course. This was thus another factor that was considered crucial in enhancing learners’ criticality and therefore fundamental to what made the practice ‘work’.

The above conclusions accorded with claims in the literature related to experiential learning suggesting that this broader literature base could have enhanced the practice by providing a conceptual framework and language to consider its aims and objectives. Claims for the role of sustained, purposeful modelling of critical reflection and self-criticism by staff (Brookfield, 1996; Brockbank and McGill, 1998; Marsick, 1990; Mezirow, 1990b) and the role of teachers’ charisma (Heron, 1992, Jarvis, 2002a) in enhancing learning accorded with the case study’s conclusions.

The facilitator was indeed found to meet Gregory’s (2002a:104) description of “competent critical reflectors” as experiential facilitators who can:

hold lightly a multi-perspectival view, will be experienced in working at the different levels of critique, subjective, social and cultural and
who do not believe in one truth outside the individual, they live with uncertainty as the norm, wishing only to critically examine beliefs to liberate self and others from the oppressive bondage of imposed interpretive structures (Gregory, 2002a:104).

This approach and capacity was demonstrated through his “presence, style and manner” (Heron, 1992:66) recalling the crucial element of what Jarvis (2002a:24) called teaching style, reflecting the “art of teaching” and “charismatic” qualities, relating to the character of the teacher and his view of teaching as “fundamentally about a concerned human interaction” (Jarvis, 2002a:29). It made him accessible as a person, generated self-confidence and self-dignity in our learners and an excitement about learning as he engaged them, often with great humour and through astute questioning, in problematising distortions in ‘accepted’ dominant knowledge they had never thought of confronting. The facilitator’s ability to do this drew also on his personal relationship with students which in turn depended on the ‘emotional intelligence’ to relate to them as a genuine person, engaging them in ‘reflective dialogue’, valuing their trust and caring about them (Brockbank and McGill, 1998). Aside from the human warmth and caring demonstrated, the level of empathy and the above critical capacities, qualifying the facilitator, in Mezirow’s terms (1990b:360) as an “empathic provocateur”, his strengths may well, in fact, have been enhanced by his own biography. (He grew up in Apartheid South Africa as a highly intelligent black African deprived of access to most ‘first world’ amenities, an activist against apartheid, with postgraduate qualifications from Universities of developed societies of the ‘West’ and married to a white English doctor).

The practice has subsequently been found to be similarly effective, however, in the hands of a facilitator with a very different biography, as discussed in the Introduction to Part Three. (A younger person, of Asian origin, a woman, more disciplined and ‘structured’ in approach, less spontaneous and outgoing, more distant in terms of personal relations also implemented the course with
great success). Attributes they had in common, however, included a critically reflective approach, dedication, friendliness, caring and a good sense of humour and the second facilitator had the advantage of learning from the 1997 and ongoing evaluative processes. This supports the conclusion that the modelling of critical reflection played an important role in enhancing both students’ learning and the quality of qualitative data from students about the case study. It also supports, however, the conclusion that another key to the course’s effectiveness was the facilitator’s role in establishing trust in an environment experienced as ‘safe’ enough for students to critique, to open oneself to criticism and to take risks in exploring ideas. Similarly it was democratic enough to avoid bureaucratic or hierarchical constraints to free, critically reflective thinking (Brown, 2002).

Linked to this was the facilitator’s effectiveness in role-modelling, and promoting in students, interest in identifying and challenging power relations dominating society, reflecting a capacity for sustained critical reflection and transformative learning (Argyris and Schön, 1974; Clark, 1993; Mezirow, 1990a; 1995). This validated experiential learning claims about its potential to limit the kind of complacency that could allow ideology to ‘tame’ experience to suit itself, or to restrict awareness of the political and social context and thus diminish its transformative potential (McGill and Weil, 1989; Saddington, 1992).

Related to this was the conclusion that the practice had been ineffective in enhancing learning in most ‘senior’ courses located in the Accounting and Finance Department. While all learning may be considered experiential (Jarvis, 1992a) this raised questions about why, in the form of learning based on experience, experiential learning should have limited impact in those contexts, and what it was that differentiated those courses and those assessment practices from the others. Subsequent monitoring, research and debate about this disjuncture included an education specialist attending accounting classes, and the doctoral study of Skinner (2002a) that notes the negative effects on students’ levels of cognition, in commerce disciplines that
ignore critical thought. Drawing on this, I offer a hypothesis that identifies three basic factors contributing to 'our' students' poor grades in level 3 accounting courses.

First, 'accounting' had the least prominence in terms of discussion focuses in the scenarios, as revealed in the case study (and Business Information Systems was introduced only in terms of computer literacy in the first year). It therefore follows that our course would have made the least direct impact on these fields. Second, the departmental lecturers providing 'extension' tutorials, were the least open of all the programme's tutors to integrating a 'process' focus to teaching and learning, with 'content', and an enormous amount of it, driving the curriculum. This included the assumption that students genuinely understood the meaning in accounting terms of words like 'benefit', 'arbitrary', 'recovery', 'distortion', 'plausible', 'subjective' and 'screening', an assumption Skinner (2001) found incorrect for both first and second language English speakers. It can be extrapolated from this that accessibility to course concepts was still more difficult for ESL learners like ours.

The rapid pace in which course material was covered in both lectures and tutorials was also related to the content-driven nature of the course and the immense body of knowledge that had to be 'covered'. It was recognised amongst faculty students and staff that a disproportionate percentage of students' time was allocated to these courses because of their vast content, with more knowledge than could realistically be fitted into the curriculum and content-based orientation (Jarvis et al, 1998; Lumby, 2000). The students complained that they were told how to make a calculation or deal with a problem but were never told why (Skinner 2000) and certainly never asked why it should be done in a particular way. Technicist and content-based in approach, there was no focus on examining assumptions behind the problem. Furthermore there was little attempt to contextualise it in relation to 'real' life, and to promote discussion around it, or to consider how students learn (Skinner 2000; 2002b). These findings resonate with feminist literature,
specifically the notion that learning involves criticality, "more than received knowledge" (Baskett and Maswick, 1992:2); and authentic ways of knowing, where cognition incorporates personal and emotional elements.

Related to our work to improve Accounting grades, has been the raising of course co-ordinators' awareness of the need for more problem-solving and critically reflective methodologies, and where staff have taken on this approach it has impacted positively on all students' grades (Skinner, 2002a). The course, Accounting 2 is an example, where the whole class average percentage mark improved from 55% for 'our' 1997 students in 1998 (their second year) to 65% for the 2000 intake in 2001. At the same time the positive gap between 'our' and 'other' students' average percentage mark increased from 3 percentage points in 1998 to 7 in 2001. The better performance was statistically significant ($\chi^2 = 8.649$, $p<0.05$; see Appendix 35 for calculation). This reflected Skinner's (2000) report on her successful intervention and elements of experiential learning being introduced to improve the learning experience. Of interest was the students' widespread recognition of the coherence between the new mainstream approach and their experience in 'our' course of the previous year, suggesting their metacognitive awareness.

In Appendix 21 there is a graphical illustration, moreover, of the improved comparative performance of 'our' students, relative to 'others' in level 3 courses in Accounting, Auditing and Managerial Accounting and Finance, the three courses that had been the most problematic over the years. Although Skinner (2002c) had reported some shift towards experiential learning principles, and therefore some optimism that students' grades would improve, she expressed the view that this was only the beginning, and further curriculum changes were needed if students were to engage more meaningfully with these courses. The difference in performance was subsequently found to be fairly significant statistically ($\chi^2 = 2.757$, $p<0.10$; calculation in Appendix 37) over all the courses, a turn-around at least from the 1997 cohort's performance discussed on page 232. (The Taxation 3
course was not a focus of concern as students reported they were happy with these classes and they did not need 'extension' tutorials).

Third, the way students were examined, influenced by the accounting profession's examination board, gave little space for independent, critical reflection (Paxton, 1998; Pincus, 1995). While there was considerable discussion about the need for critical thought within the profession, there was little evidence of examining for autonomous problematisation of issues, for instance in relation to the wider context of questions about accountability and malpractices in corporate governance (Skinner, 2000). There was no focus on the explanation, defence or critique of current practice (Skinner, 2001). Since the assessment methods dictate the way students learn, there was little point in changing teaching and learning approaches without changing the assessment methods to reflect a new focus on independent thought and critical reflection. Without such change, the shift towards experiential learning in the 'extension' tutorials reflected a lack of coherence in the curriculum that was obvious to students, and resulted in some lack of motivation to engage in critically reflective, problem-posing learning processes.

There was thus little opportunity for integrating within the curricula, the kind of critically reflective attitudes and approaches to knowledge and learning associated with our practice and experiential learning. At the same time we had not focused on developing the kind of learning, knowledge and skills being examined and therefore did little to help the students in those courses. This begs some questions about the demands and challenges of education for the twenty-first century, the problems of content-based teaching and learning and the power of professions to dictate curricula.

For reasons that may well include those hypothesised above, 'our' students, were thus not significantly helped relative to 'other' students in the senior accounting-related courses. This finding therefore supports the claims made by experiential teaching and learning literature, and the notion that key to what
made the practice effective was its experience-based and existential, emancipatory orientation.

Conclusion

This chapter has shown that the course team’s practical curriculum knowledge and understanding of their students’ holistic learning needs was not matched by familiarity with the literature on either problem-based or experience-based learning theory. It has reflected, however, on the strengths and weaknesses of problem-based and experience-based learning in terms of the case study’s findings about the practice’s effectiveness in enhancing learning to argue that the latter provided a more suitable conceptual framework for the course.

The PBL literature failed to provide a ‘fitting’ conceptual framework as it represented more conservative interests than the team’s, framed as they were by ‘Western’ instrumentalist, individualist, work-based interests and cultures. I have argued however, that the method’s theoretical underpinnings did not in themselves prohibit the application of a more progressive interpretation of PBL. The literature has illustrated how educators for the professions have in fact monopolised the approach, focusing on the pragmatic while ignoring its more emancipatory potential and rendering the application narrower than the theory. The method has thus become closely associated with their purposes and regarded as progressive within that context.

The chapter has shown that the course’s ‘whole student’ and emancipatory interests were well represented in the broader literature on experience-based learning, of which PBL is but one aspect. It has demonstrated how the case study conclusions largely supported the claims of experiential learning theory. In these terms the practice could be conceived as promoting ‘whole student’ learning and free thought through a disjuncture between biography and experience; acknowledging the role of emotional and spiritual intelligence in
personally empowering students; foregrounding an existential orientation and providing 'liminal' and 'primary' learning experiences.

The following curriculum aspects demonstrated synergy with experience-based learning theory. It recognised the socio-political and cultural influences on students' lives and the consequent emotional, spiritual and educational needs. The course also provided opportunities for critical reflexivity through problem-posing around realistic situations that were relevant to learners' experience, yet stretched them beyond what was familiar, recognizing the need to give students the space to think freely.

The approach foregrounded and drew on elements of African culture like 'ubuntu' and consensus-reaching, and recognised indigenous knowledge systems to promote students' personal empowerment and criticality in the face of dominant 'Western' knowledge and values. The course itself was conceived as a liminal experience. This reflected the team's practical understanding of the need for support - cognitive, emotional and spiritual - in a 'safe' and friendly, nurturing environment, to help students make the transition from the familiarity of their former lives and education to the unknown and intimidating.

There were relatively egalitarian relationships with staff, and democratic teaching and learning processes facilitated by the warm, rich character of the 'teacher' and his empathy with students. At the same time the staff modelled critical reflexivity through teaching and learning processes, personal attitudes and ongoing critically reflective probings about the course experience, providing coherence between teaching, learning and course development and evaluation processes. In Mezirow's (1995) terms, the curriculum recognised that transformative learning required dual opportunities to learn both how to participate in democratic processes and how to question assumptions underpinning dominant knowledge and the status quo.
The content material was selected for its accessibility to the learners in terms of prior knowledge and experience and the critical reflection it could catalyse. This occurred through discussion of issues that demanded free thought, providing opportunities for students to develop new understandings about knowledge and 'intellectual' ways of knowing, examining assumptions underpinning concurrent learning in mainstream courses and prior knowledge, beliefs and values.

In this chapter we have thus seen that the curriculum implemented in the case study was well documented in the experiential learning literature and that this learning theory would have provided a more suitable conceptual framework for the practice than PBL, as represented in the literature. The course effectiveness could indeed be attributed to its conceptualising the 'problems' as 'experiences'. The chapter has hence discussed in theoretical terms the kind of opportunities that promoted learning, adding to the argument that we could improve the learning conditions for our students and that these could affect the outcomes.

Having explored the concept of experience-based learning we are now in a position to consider how replicable the curriculum would be in the wider University context, given the difficulties the University experienced in implementing change, including curriculum reform, as discussed in Chapter Two. We will do so in the next chapter.
CHAPTER NINE

UNIVERSITIES AND CURRICULUM CHANGE

In the previous chapter and in Part Three's Introduction we have considered the strengths of experienced based learning theory in terms of a curriculum that incorporated many of these principles. It has been argued that the course enhanced learning and that the experience-based approach made the curriculum effective, affecting the learning outcomes, not only in the case study but also in the five succeeding years. At the same time the contextual discussion of Chapter Two showed that very little curriculum change of this sort occurred throughout the University. This confronted me with another problem that I needed to address in order to answer more fully the research question about possibilities for improving learning opportunities. In this chapter I therefore try to answer the question of whether the case study findings might be replicable elsewhere in the University in view of the problems it might have in changing enough to accommodate new approaches to teaching and learning.

We have noted that over the five years following the first curriculum implementation, the course aims and philosophy remained the same, although the practice continued to be developed in response to the changing context, and in these circumstances the findings of the case study were largely replicated. Based on this experience I suggest that the approach might well be replicable elsewhere in the faculty. We have seen, however, that traditional approaches to teaching and learning have continued to characterise the other 'mainstream' courses thus far. We are now going to explore, therefore, the replicability of the case study findings in terms of the University context.
To this end we are going to draw on the discussion of Chapter Two which highlighted the University's problems in implementing the transformation planned, to consider what would be needed to enable the University to change enough to accommodate non-traditional curricula. The University experience will be contrasted with that of the division in which the case studied was located, which was characterised by rapid development. We will thus look at the prospects for replicating the findings of the case study and the subsequent years' experience in two sections, which are:

- The division and change.
- The University, the faculty and change.

In the first section we will focus on an important lesson, learned incidentally through the case study, about the capacity of the course team, and division staff, to respond positively to the external forces for change. We will consider the factors that supported rapid course and programme development, in terms of learning organisational theory (Senge, 1990) to foreground the kind of changes that might be needed if non-traditional learning conditions were to be implemented more widely. We will do this in the following four sub-sections:

- Harnessing external forces for change.
- Appropriate resources.
- Empowering leadership style.
- Enabling structures, culture and philosophy.

In the second section we will look at how this 'micro' experience contrasts with that of the whole University. Drawing on the discussion in Chapter Two, we will consider the Vice-Chancellor's attempt to promote institution-wide transformation, the difficulties she faced in developing the internal momentum needed for change and the consequent scarcity of curriculum reform projects like that studied here. To do this we will look at how the bureaucratic structures and cultures might well be obstructive to change and diminish the prospects for implementing a non-traditional curriculum more widely. We will
also consider how unlikely it is that universities do transform themselves into dynamic learning organisations that might enable them to change enough to accommodate experience-based curricula (Duke, 1992; Senge, 1990). This section is therefore divided into two sub-sections, which are:

- University structures, culture, philosophy and change.
- Universities as learning organisations.

Having explained the structure of this chapter we will now focus on the experience within the division in which the study is located.

The Division and Change

This section explores the factors that were enabling to change in our division in the light of the fact that it was the only place in our faculty where this kind of curriculum response to the situation was taken. It also represented one example of very few curriculum reform initiatives of this nature in the University. The description of the programme's evolution, on page 79, revealed how it developed rapidly from the initial 'bridging' approach of 1989, with a 'remedial' flavour for a selected group of sponsored students. By 2003 we were piloting a course developed from that under study as a compulsory element of the first-year Management Studies 'package', aiming to promote free thought in all faculty students. (While this represents fundamental curriculum reform in that the faculty board agreed to restructure the components to the degree, these new learning opportunities were, however, still restricted to our course).

At the same time the course's development discussed in Part Three's Introduction, on page 304, demonstrated that rapid, creative curriculum change was implemented through dynamic, iterative course development processes in response to a transforming context. The programme thus provides an example of how rapid, relevant and idealistic change can occur in
certain circumstances and this section explores the lessons learned about the factors that made it possible, drawing on learning organisational theory (Senge, 1990). These factors impacted also on the quality of change implemented in the light of an idealistic curriculum, the capacity to respond creatively to ‘top-down’ instruction from government and programme sponsors, discussed in Chapter Two, our ‘ownership’ of relevant aspects of the University’s strategic plan and interest in implementing it. They are discussed below.

Harnessing External Forces for Change

This section illustrates how the course team and division staff, unlike the University more generally, generated the internal momentum for change that could harness the external forces, operating in the kind of synergy that enabled them to work as a dynamic ‘learning division’ (Senge, 1990). The capacity of the team to change was influenced by the national mood of extraordinary and widespread optimism, energy, determination and vision sharing. Energised and enthused by the country’s liberation and its constitution that promoted a democratic, socially aware society, the course team grasped the opportunity to work in ways that could empower their learners as critically reflective students and citizens. The team meeting notes record some of our ardour, excitement and awe at the immensity of the country’s transformation goals and the prospect of making a small contribution to the ‘miracle’ the country sought to perform. They record debates that reflected our interest in education, about emerging controversial educational policy and how we could give substance both to the new government’s vision for education and the University’s transformation plans.

In the same vein, global realities, perceived as urgent by the course team, influenced curriculum change in the aim to meet the changing needs of a newly liberated country, and the challenges of preparing our students to be both globally competitive and critically aware. The world situation indicated to
us the need to develop in our learners, critically reflective or 'intellectual' attitudes and approaches to knowledge. The 'globalised' world economy, with its unequal power relations, offered a compelling challenge to academics to reflect on their role in promoting problem posing about the sustainability of the global status quo. It called for academics to question the limitations of content-based curricula if they failed to enhance conscious thought and to empower students to critique dominant (and all) knowledge, to make personal sense of new knowledge, to promote inclusivity and to re-build moral motivation (Prozesky 2002b).

The course team thus experienced both local and global contexts as stimuli for the development of curricula based on questions rather than answers. Curricula could be used to promote criticality and 'spiritual intelligence' (Zohar and Marshall, 2000) in learners through developing, for instance, a related interest in social justice and an ideal democracy. We experienced as pressing, the need for Management Studies students, like all students, to think independently and to become more than highly skilled, competent graduates. We therefore sought to develop a curriculum that would leave learners free to reach their own decisions about business-related issues, engaging them in thought processes that led to deeply understanding, and making personal sense of, the kind of choices involved. In this way we aimed to promote a consciousness that business decisions could be made because they were 'right' (Visser and Sunter, 2002; Zohar and Marshall, 2000). We therefore provoked students into examining, for instance, assumptions underpinning the kind of business decisions that were based solely on selfish interests with no consideration for the good of the whole.

The idealistic approach was supported by the other factors, considered below. They also affected our interest and capacity to cope with rapid change and to respond creatively to the 'top-down' instruction from government and programme sponsors, discussed in Chapter Two, and to the University's strategic plan.
Appropriate Resources

This section focuses on the role of resources in enabling change. The division had both the financial and human resources it needed to achieve its aims. Private funding allocated specifically for student development; a team of academics who were education specialists, interested in curriculum reform; and small numbers of students all supported our innovative efforts. The staff to student ratio was, nevertheless, only slightly more generous than that of the faculty 'mainstream', as discussed on page 84, hence the relevance of the other contributing factors.

In contrast to our situation, a major factor limiting institution-wide enthusiasm for change was severe economic constraint. As with universities elsewhere, including those in developed societies (Dalheimer, 1997; Duke, 1992; Jarvis, 2001), South African historically ‘advantaged’ or ‘white’ universities\(^\text{13}\) struggled in the face of ever-reducing state funding, to respond to both local and global demands. As discussed in Part One, the global pressure on the South African government to develop a neo-liberal economic policy influenced the downsizing of social services, affecting the financial allocation, inter alia, to Higher Education, including its transformation processes (Moja, 2002; Pithouse, 2002; Seepe, 2002a; Subotzky, 2002). This meant that academics were confronted with the challenges of steeply growing student numbers, decreasing budgets and staff to student ratios while the University Executive tried to engage staff in developing the strategic plan (University of Natal, 1994). Tables 9 and 10 in Appendix 22, demonstrate the rapid change from 1989 to 2002 in terms of student and staff numbers and students' changing

\(^{13}\) ‘Historically disadvantaged’ universities, situated in rural, undeveloped areas to promote racial divides amongst students and intellectual leaders, represent another level of the South African higher education experience (Gultig, 2000; Knott, 2000) that does not bear comparison here and lies outside the scope of this study. They focused mainly on meeting the demands of impoverished, poorly educated communities in which they were located (Seepe, 2002a), with hopelessly inadequate human and financial resources.
cultural composition on our campus and specifically in our faculty. The tables illustrate why staff felt fully committed in meeting their regular teaching, research and administrative tasks before being asked to consider University transformation issues.

Aside from the contrasting circumstances discussed above, the programme's resources included a team of keen education specialists with specific interests and roles in academic development, involving students, staff and curricula. Hence we fitted the description of 'frontier enthusiasts' adapted from Duke's notion of a typically "small circle of enthusiasts ... surrounded by larger numbers of the sceptical and indifferent" (Duke, 1992:105). This meant we were directly, and professionally interested in debates about issues like the role of the university and of academics in current contexts, curriculum reform, learner needs and educational transformation. Our concern about what the University should become in the newly liberated South Africa was thus a direct extension of our jobs and interests. Similarly, our dreams about the ideal university's role in society of truth-teller and preserver of democratic values (Barnett, 1990; Brown, 2002; Duke, 1990; Jarvis, 2001, Brownhill and Jarvis, 2002; Maughan-Brown, 2002a) reflected the importance to us of having a guiding vision, whether or not it was achievable (Jarvis, 2001, Pearson, quoting Robert Swan, 2002). Enhancing our will to work with idealism was the fact that our practice was uninhibited by the kind of realities constraining most 'mainstream' subject-specialist academics. These included the perceived need to 'cover' a syllabus of content knowledge, leaving little focus on teaching and learning processes, and accountability to Heads of Department with set, generally conservative curriculum expectations.

Empowering Leadership Style

This section discusses the role of a powerful champion and 'learning leader' in enabling change, in terms of the Dean who provided the environment we needed, despite his above challenges. The programme benefited from his
trust, the freedom to keep on developing the programme, uninhibited by bureaucratic constraints (Brown, 2002, Jarvis, 2001) and his friendly interest and encouragement. His leadership style thus impacted positively on our capacity to innovate, protecting us from the debilitating effects of imposed policy or bureaucracy.

Over the seven years of his deanship, since 1995, the Dean’s leadership reflected strength and vision. He refused to allow his role to be reduced to merely a bureaucratic, management one and effective management skills, vital to the running of a large faculty, were coupled with vision and sound leadership (Jarvis, 2001; Maswick and Watkins, 1990). He provided a role model as a ‘learning leader’ despite the challenges of swelling student numbers and student to staff ratios, as discussed above, and the bureaucracy associated with increasingly centralised control over procedures like course accreditation (Brown, 2002, Duke, 1992, Jarvis, 2001). This approach typified his relations with all faculty staff and his strengths as both academic and leader earned him widespread respect in the faculty and beyond. He gave us the freedom to develop the programme in response to our changing circumstances without encumbering us with bureaucratic processes. The trust and the space he gave us to work autonomously and to learn how to work and learn together (Senge, 1990) empowered us to operate collaboratively as reflective practitioners. This enhanced our capacity to implement rapid change in response to changing circumstances.

Resonating with the work of Senge (1990), Goleman (1996) and Zohar and Marshall (2000) the Dean demonstrated the strengths of ‘ease with power’ associated with emotional and spiritual intelligence in a leader. Satisfied to remain outside the project, uncontrolling, he allowed us to develop a shared vision and team coherence to enhance learning and ownership of our achievements. He understood our commitment to transformation, that our vision was located in the socio-political context, and the learning inherent in “thinking, doing, evaluating and reflecting” (Senge, 1990:357). The Dean was more interested in learning, in listening to what we were concluding from our
experience than telling us what he thought we should be doing. He thus displayed the capacity to facilitate change through trusting colleagues to draw on their creativity and inner motivation to innovate, allowing them space and energy to work (Jarvis, 2001; Maswick and Watkins, 1990; Senge, 1990).

The conditions under which we worked, included direct accountability to the Dean. This avoided the kind of delays, distractions, frustrations and indeed 'political positioning' associated with more elaborate hierarchies and bureaucratic procedures. The reports to the Dean almost entirely took the form of informal conversations about our progress, and were characterised by his genuine interest in, and support for, our work. They provided opportunities to keep him informed of progress in the course development process, to discuss issues arising and to gain his input on decisions about the best way forward. This enabled us to be creative and spontaneous in our work, as we were confident that he understood what we were trying to achieve and that he supported our efforts and trusted that we were working as best we knew how, in the interests of the students. The Dean's real interest and understanding also meant he could also represent us effectively in higher University structures.

Enabling Structures, Culture and Philosophy

This section focuses on the need for appropriate structures, culture and philosophy in implementing curriculum change. Rapid developments within the programme were similarly facilitated by an open approach to learning associated not only with a critically reflective approach to 'learning-by-doing' in a transforming context, but also with the opportunity of working closely and democratically in a team. Underpinning my 'learning leader' role was a shared vision and determination to achieve this change, and the confidence that together we could (Senge, 1990). The team meeting notes (1996; 1997) recorded constant reference to the programme's aims, ideals and values, that I found enabled us to work collaboratively and to overcome differences of perspective. For instance, in agreeing to disagree on issues like where on the
continuum between authority and democracy we should locate our practice, as raised on page 204, the team was able to continue to work effectively, prioritising the good of the whole project over individual interests. Indeed, in the terms of Goleman (1996) and Zohar and Marshall (2000), our team demonstrated a fair degree of ‘emotional’ and ‘spiritual’ intelligence’.

Enabling change, at the same time, was the critically reflective approach with the involvement of students as co-learners in the quest to understand current realities and adapt our practice accordingly. The quality of our responses was not hindered by unquestioning, bureaucratic, hierarchical reporting structures (Jansen, 2001). The notion of academic autonomy meant to us the freedom to work in this way and express our views openly through these flat structures and within this ‘learning’ culture. The team meeting notes (1996; 1997) record a questioning approach, an ethos of listening to and valuing one another’s ideas and an openness to reframing and transforming previous thinking (Senge, 1990; Zohar and Marshall, 2000). This experience demonstrates the validity of the approach but it is acknowledged that ours were relatively easy circumstances under which to implement ‘learning’ principles. Strengthening the chances of successfully applying a ‘learning leadership’ approach was the small size of the team and the above resources available to the programme. The practice was enhanced, furthermore, by the programme’s culture and democratic structures, which were both enabling to, and promoted by, this leadership style.

The programme experience demonstrated that operating as a ‘learning programme’ with democratic, non-hierarchical structures and non-bureaucratic procedures helped us change rapidly. Although our staff to student ratio was only slightly more generous than that of the faculty, as discussed on page 84, our circumstances freed us to focus on vision and learning rather than organisational systems, hierarchies, procedures and controls. These conditions, including the Dean’s leadership, therefore protected us from those factors that limit learning, creativity and innovation (Brown, 2002; Jarvis, 2001;
Makgoba, 2002b; Senge, 1990) and influence the way practitioners address educational questions.

An important strength for implementing change was the team's capacity to view the programme holistically and adopt roles that overlapped as and where necessary, for the good of the programme. As a team, we needed to find whatever leverage we could from amongst ourselves, to address the realities and threats to the programme. These included the changing demands, expectations and perceptions of both sponsors and students and the need to constantly monitor external developments in relation to our situation. Working in constant flux also left limited possibilities for team members to feel 'experts' in the programme's various functions like student recruitment, teaching and learning or team management processes. This encouraged ongoing, consultative critical reflection amongst those with specific responsibilities. Indeed we "live(d) the questions rather than the answers" (Zohar and Marshall, 2000:296), working together to reach decisions.

A limitation of the team, however, was that it had only one Management Studies discipline specialist. This left the rest of the team very dependent on him, as raised on page 183, in terms of identifying core concepts that could emerge through the cases; drawing on theoretical knowledge behind the cases, in related tasks and discussions; and therefore the teaching itself. We could therefore not easily 'cover' for him in the case of his absence nor critique the links he drew between theoretical and practical knowledge. Nevertheless, the democratic approach promoted teamwork, shared vision, fearlessness in expressing spontaneous ideas and thinking aloud, and discussing theoretical knowledge in practical terms, as captured in the team meeting notes (1996; 1997). It thereby enhanced our capacity to interrogate our practice and implement rapid change.

The team meeting notes (1997) also demonstrated the value added to the course development and implementation processes through insights of team members from outside the discipline, a point flagged on page 183. Aside from
enriching the deliberations on teaching processes, education specialists, like the students, were meeting new theoretical concepts for the first time, and therefore experienced learning first-hand. They were, therefore, able to understand and empathise with the students' curriculum experience more fully than would otherwise have been possible. In the same way we found that an education specialist played an important role in collaborative curriculum work with accounting specialists. From her stance, she could identify teaching and learning problems in the accounting courses that were too 'close' to the subject specialists to recognise and initiate with insight, effective curriculum change processes, as discussed on pages 183 and 342.

Not unexpectedly, however, the case study showed that democratic, collaborative 'learning' processes were time-consuming and not always smooth, stretching staff and students beyond their 'comfort zones' to accommodate and interrogate differing perspectives and priorities. Students' challenges to the programme's structure, for instance, through sensible, logically argued recommendations, as raised in the case study, required speedy implementation. This stretched the programme's administrative capacity but gave substance to the students' co-learner role and our 'learning programme' principles, providing students, at the same time, with a 'primary' democratic learning experience (Jarvis, 1987; 1992a). Similarly, the course team was not always happy with the facilitator's spontaneous changes to agreed course plans, as discussed on page 212, or with instances where students misused their democratic power to influence course decisions, raised on page 209, by diverting the course for selfish reasons. This signalled the need, discussed on page 206 to seek constantly an effective balance between authority and democracy in order to enhance learning through democratic structures.

Outweighing the above shortcomings, however, was the value found in the democratic, critically reflexive approach and the spirit of co-learnership, mutual respect and trust, of valuing multiple perspectives. Enabling to this approach was the centrality of our shared vision as a constant reference point,
helping staff and students put the good of the whole above individual interests. It helped the course team overcome difficulties related, for instance, to different perspectives, discussed on pages 204, with diverse understandings and expectations of what was meant, for example, by our 'democratic' and learner-centred' course aims. Typical of collaborative work involving different personalities, these were particularly unsurprising in view of the team's different cultural backgrounds, so deeply divided in the past, and their related sensitivities. Indeed the team's capacity to transcend these conflicts was a tribute to each member's commitment to purpose and 'spiritual' and 'emotional' intelligence (Goleman, 1996; Zohar and Marshall, 2000) associated with the critically reflective approach.

One element of the 'tension' at the edge between order and chaos in this process (Senge, 1990; Tetenbaum, 1998; Zohar and Marshall, 2000) thus reflected the multiple perspectives of staff, students and sponsors. It gave rise to the creative energy that enabled us to learn and develop the course and programme in response to emerging understandings. Evidence for the effectiveness of this approach lay in the great depth of initiative, capability and responsibility within the programme amongst both staff and students.

Through constant reflection on the team's priorities and individual strengths, staff members were enabled, as far as possible, to focus on areas in which they could make the greatest contribution and had the most interest. This allowed, for instance, one staff member to focus very successfully on staff and curriculum development and research when she felt her strengths were not in promoting student development through one-on-one interaction, and in fact felt frustrated by her lack of achievement in this area. She excelled in her work, developing insights and undertaking research that was enormously enriching to the programme and informed further developments.

The programme's effectiveness thus depended to a great extent on the staff's commitment to, if not passion for, the programme's broad vision and purpose, and identifying where they could best add value. Hence a central element to
my leadership was the careful selection of appropriate staff by a selection panel that included programme staff and the Dean. This involved, primarily, the identification of a compatible worldview, educational philosophy and dedication to the vision guiding the programme's development, specifically in terms of attitude to students, teaching, learning and collaborative, deliberative teamwork. (Appropriate experience, while important, was a secondary consideration).

The democratic, flat structures and related leadership style thus promoted a strong, committed staff complement, enthused by a shared vision and purpose which helped us respond creatively to changing circumstances. While the structures did not overcome the problems of poor course organisation and administration, discussed on page 210, they also did not curb our capacity to respond creatively to government and sponsor demands. They thus enabled us to develop the course and programme effectively and appropriately. This allowed the programme to survive when others failed, specifically the programme discussed on page 81, comparable in terms of faculty, initial structure and aim, as discussed below. Hence the structures promoted an environment that staff found conducive to successfully developing a progressive, nurturing learning experience that enabled students to achieve exceptional grades.

The structures and culture of the programme enabled us to minimise 'top-down' control over our work. We shared a vision and coherent philosophy that framed our responses to both government and sponsor demands. Sponsors had the power to impose rapid change through influencing, for instance, the restructuring of the programme from a four-year to a three-year programme, (to save the extra year's costs). While this involved some worrying compromises for us, it did not prohibit fresh responses. In fact, the change was used as an important step in developing the course into a core compulsory component for all students. It subsequently helped also with marketing the programme to sponsors and students in the changing local context. In this way our culture and flat structure was enabling to rapid
change which was framed by our shared vision. It meant we could adapt our curriculum effectively without losing sight of our vision and purpose, and continue to enhance learning in the new programme structure. The students still achieved good grades as demonstrated in Appendix 3 so sponsors continued to provide bursaries. Thus the programme was not only able to survive the change but it could also maintain its effectiveness in changing circumstances.

The partnership with business was, nevertheless, problematic in some respects. One example was sponsors’ increasing tendency to seek to recruit ‘least risk’ student applicants who would graduate in the minimum time, fit the company profile and fill spaces in departments identified as ‘too white’ or ‘too male’ in terms of government policy. Furthermore, by 2001 sponsors sought increasingly to fund bursaries for second-year students with proven academic ability, to save costs and shorten the investment term. By 2002 there was a pronounced interest in more sophisticated candidates, in terms of ‘Western’ culture, from the previously ‘white’ schools. Although such candidates were often still financially needy and socio-economically marginalised, as, for instance, children of domestic workers in urban situations, this trend discriminated against the rural applicants the programme had traditionally targeted.

While forcing compromises on us, however, the sponsors’ demands catalysed self-reflection and responses that minimised their impact. For instance, we developed a new initiative in 2001 for funding less ‘sophisticated’ students in their first year, as discussed on page 82, to enable them to develop skills and attributes that would help them access bursaries for their second year. Thus the programme was able to stay true to its vision of offering life-changing opportunities to needy people. To that extent the idealism was not lost.

Similarly, it minimised for those students who experienced little or no career guidance at school, the problem of sponsors recruiting them as school-leavers for particular careers. This intervention gave students a year to consider their preferences. We were powerless, notwithstanding, to address fundamentally
what we consider to be a seriously problematic situation and this indicates a limit to our capacity to deal creatively with 'top-down' instruction while maintaining our original vision.

On the other hand, despite compromising our vision through adapting to changing demands, the programme at least survived the mid-1990s, essentially intact and relevant, when most privately funded programmes were forced to close. Indeed the 'bridging' programme in a similar 'historically white' university and faculty, on which ours was modelled in 1989, failed to adapt to changing circumstances and perspectives (Anglo-American Corporation, 1994) and was forced to close through lack of funding. This was despite its more favourable geographical location in terms of convenience to sponsors, highlighting the value of flexibility in the face of a changing context. Hence, compromises could be reached without sacrificing core elements of our vision and purpose. Our partnership with business did not impact, for instance, on the programme's pedagogical and curriculum interests beyond inspiring us to develop the best learning opportunities we could to ensure the continuation of good grades, further funding for bursaries and thus the programme itself. We also found students from different schooling backgrounds all benefited from the programme, as illustrated in Appendix 3. There were thus opportunities to respond judiciously to sponsors with their different priorities and interests just as the government's bureaucratic procedures could be used as a catalyst for thoughtful change.

The Dean's repeated description of the programme as a 'flagship' for the faculty, raised on page 307, bears some testimony to the successful way in which it operated. There was further evidence of his high regard for the way we worked and his confidence that we could produce an effective learning experience for all his students. It included his considerable investment of funds and staff resources for research and consultation in the process of developing the new course (reflected in Appendix 19), re-structuring the degree requirements to accommodate the new course. He has also financed a dedicated library facility to enable us to apply experiential learning principles
to the 2003 course context. We motivated for this facility in order to promote access to current business opinions and broad debates for larger numbers of students, and thereby enhance critically reflective, interactive learning and free thought around business issues.

The programme structures, culture and leadership style impacted also on students, in terms of their learning experience, personal growth and their input in developing the programme effectively through egalitarian, open, co-learner relationships. There were some frustrations with students abusing their democratic power and staff's trust in negotiating course changes, as raised above and discussed on page 209, but the value in these processes far outweighed this negative aspect to the practice. In fact the students contributed enormously to the running and achievements of the programme. They were empowered to develop ways in which they could support one another as a critical community, with the senior students particularly using their initiative to enhance the learning environment, individually, or through the dynamic, annually renewed Students Activities Committee, as discussed on pages 85 and 365. At the same time, giving students the freedom to innovate enabled them to develop self-confidence, leadership and communication skills, and to use their initiative, thereby, enhancing their employability.

The following examples demonstrate the quality of the students' input as critically reflective co-learners, their sense of community and the value they added to the programme. Students successfully motivated for funding from sponsors, to hold social functions for the purpose of enabling new students to meet senior students and benefit from their moral and academic support. This tradition has been continued over seven years. During 2002, senior students, with the programme's administrative support, initiated and ran a weekly Friday afternoon class for the first-year group to reflect on the week's work, raise issues of concern and develop strategies for the way forward. Full attendance at these non-compulsory sessions indicated that they were perceived to be useful. The students refusal of any form of payment, on grounds that it would "spoil the feel" (Ndwandwe, 2002) of the intervention, demonstrated their
idealism and sense of community. Students also initiated the first-year students' participation in a leadership course, successfully motivating for faculty funding to finance it. In early 2003, students raised funding for a debate between two representatives from the accounting profession, each of whom had received different kinds of professional training, in order to inform students about future career and training options. Another student initiated and ran a questionnaire amongst her classmates for information about which curriculum interventions had helped them most, to inform improvements to the programme.

A related experience in March 2003 demonstrates the quality of students' input. The lecturer responsible for starting the 'house-keeping' session was too ill to take the class; other staff could only join the session a few minutes late, so before leaving for home the ill staff-member telephoned a senior student to ask him to fill in. On my arrival, three minutes into the session, which I normally 'chair', the senior student was already collecting from the class, items for the agenda. He ran the session, with me sitting at the back, contributing to the discussion along with other participants. One of the items to be discussed was concern about the effectiveness of one of the tutors, a concern we were aware of from informal student feedback. While this was being discussed another staff-member arrived with the student who had run the above questionnaire. They had been discussing the same matter, in relation to the questionnaire, and decided to join the 'house-keeping' session and add the item to the agenda if it was not already there. The senior students proceeded to argue, based on their experience with the tutor, that ultimately she was effective, that they would lose a great deal if she left the programme and that they could work through their problems with the tutor, as previous groups had done. They talked persuasively, from experience, about students' power and responsibility to influence tutorials' effectiveness by being well prepared, having read relevant material, bringing specific questions to the session and giving tutors feedback on how they are experiencing the tutorials. The students all agreed to follow this advice and suggested we keep the
matter on the agenda until they were satisfied that the problem had been adequately addressed.

The case study and subsequent experience thus provided lessons about the impact of democratic structures, reflexivity and freedom from organisational bureaucratic systems on the programme’s capacity to implement rapid change. At the same time these lessons demonstrated the role of emotional and spiritual intelligence in facilitating change through, for instance, drawing on multiple perspectives and enabling us to respond creatively to ‘top-down’ instruction. The quality of our responses was not hindered by unquestioning reporting structures (Jansen, 2001) associated with a strongly bureaucratic approach discussed below. At the same time we were able to benefit from the strengths of our University’s liberal ethos in ways that escaped the wide academic community, as discussed below. The notion of academic autonomy meant to us, the freedom to work in this way and express our views openly through these structures and within this ‘learning’ culture.

Hence the programme’s culture and related democratic structures enabled us to respond to ‘top-down’ instruction in ways that were more positive and creative than those of most academics. At the same time the absence of the above enabling factors across the broader institution made it difficult for the University to implement widespread transformation. Clearly, providing leadership to, and enabling institution-wide change involving large numbers of academics and students, with their wide-ranging interests and purposes, was a different league of challenge altogether, as discussed below.

The University, the Faculty and Change

In this section we explore how possible it would be to replicate the case study findings in the University context, contrasting this broader experience with that of the division. To do this we take forward the discussion in Chapter Two on how the University responded to the South African context of the 1990s by
developing a strategic plan for transforming itself. We look at some of the experiences of the faculty and the University as they sought to implement change; factors that make it so difficult for universities to change; why it is difficult for universities to implement learning organisational principles. We will do this in three subsections, which are:

- Faculty and University experiences in implementing change
- University structures, culture, philosophy and change
- Difficulties in becoming a ‘Learning University’

Faculty and University Experiences in Implementing Change

We consider here the faculty-wide developments under the Dean’s remarkable leadership and what obstructed broader curriculum change. The transformation experience across the University community, including our faculty, differed substantially from that of the division discussed above. The year 2002 marked the end of one transformation cycle and the beginning of another for the University, the course studied and our programme, as discussed on page 79. Fourteen years after both the University’s mission statement (Appendix 1) and the programme were launched, the new Vice-Chancellor, dissatisfied with the transformation that had occurred, brought with him a vision for ‘Africanising’ the University. It incorporated plans to develop a university of international academic standing that recognised the richness and relevance of African knowledge and culture (Makgoba, 2002b). According to the Concise Oxford Dictionary (Thompson, 1995:1481) “to transform” means to “make a thorough or dramatic change in the form, outward appearance, character etc of”. This leaves open to interpretation what would constitute a ‘transformed’ university or programme and how dramatic, thorough or fundamental change should be before it could qualify as such. It also begs the question for universities to consider, of how such meaningful change could be facilitated.
Evidence of the Dean's successful leadership includes the growth and the changes in the faculty that have occurred during his deanship. He has led the faculty through the very challenging magnitude of growth, illustrated in the tables of Appendix 22, in order to cross-subsidise other faculties' shrinking student numbers, on the Executive's instruction (Lumby, 2002b). At the same time, under his leadership the faculty has maintained its high status amongst the community it serves, and increased in popularity. In February 2003 the faculty admitted 600 first-year students selected from 6000 applicants (Lumby, 2003).

Over the seven years in office he has provided the vision and space for the planning and implementation of diverse new initiatives that reflect the changing needs of the country and new government policy. These include distance learning programmes, a graduate school, the Alternative Access Programme and the ongoing evolution of our programme, discussed in Chapter Two, into the current Enriched Management Studies programme. It should be noted, however, that the trust and freedom granted to one of the directors involved was misplaced, reflecting the kind of risk involved in this approach. Nevertheless, demonstrating his high standing within the academic community was the support he received from the University Executive through the crisis, confirming the continued recognition of his valuable contribution as a highly effective leader, and his role as a "leader amongst the deans" (Maughan-Brown, 2002b).

The procedural, mechanical re-shaping of courses in order to register them according to new OBE requirements within government-set time frames was efficiently achieved. The faculty mainstream staff failed to engage meaningfully with curriculum change beyond that, however, despite the University's curriculum reform plans and, more specifically, the Dean's provision of conditions conducive to such work. These included his progressive leadership style, the external forces for change, discussed above, the Dean's efforts to promote a common vision for the faculty and the establishment of internal quality assurance measures.
The academics coped efficiently and responsibly, nevertheless, with burgeoning class sizes and workloads, within the framework of traditional faculty structures, styles and expectations. They thereby demonstrated considerable pride in the high standards they were striving to maintain, as did academics in other faculties. It was noted by 1997, however, that implementation of the University’s strategic plan across the institution had been slow and scattered, relying on the enthusiasm of a few individuals (University of Natal Task Group, 1997). This indicates that the above conditions were insufficient for enabling broad change and that some of the elements that had enabled change in our programme were lacking. First, the faculty structures, like those throughout the ‘mainstream’ University, did not promote the kind of interaction conducive to change, despite its progressive ‘learning leader’. Second, the ‘learning university’ principles espoused in the strategic plan to promote, for instance, student, staff and curriculum development, were insufficient to engage staff broadly in learning about new approaches to teaching and learning or developing their teaching skills. Staff development workshops were not well attended by subject-specialist academic staff.

The broad South African context of the 1990s thus elicited responses from the division staff that accorded with the University’s strategic plan and the approach of the Dean, but differed from those of the wider university community. While we drew inspiration from both local and global contexts, resulting in the energy and interest to engage in curriculum change processes, the broad academic community largely continued with their content-driven curricula. They maintained their focus largely on ‘what’ to teach, to the exclusion of considering ‘how’ they could enhance learning. The reasons for the contrasting foci relate to the different conditions under which we worked, including the programme’s purpose, resources, philosophy, structures and interests, as discussed above.
The University Executive and the Dean’s difficulties indicate that broad, critically reflective, rapid change depended on more than providing the framework for projects like curriculum reform and staff development. The dissemination of documents about becoming a ‘learning university’, the consultative meetings, regular newsletters, collaborative document drafting and commenting processes had clearly failed to capture broad ‘ownership’ of the new vision. It relied on more than a context of euphoria associated with the country’s political transformation and the efficient implementation of mechanical course registration procedures. While there were pockets of enthusiasts there was also widespread resistance to transformation plans. The Task Group (University of Natal Task Group, 1997) found “a large degree of suspicion of and opposition to university management … during interviews and discussion” and a sense that the University showed no appreciation for their efforts in coping with a changing student population. Instead they felt they were “presented with demands for staff savings” and “criticised for not being more innovative”. Thus the effects of the University’s stated commitment to “transparency and to consultation in conformity with intention of becoming a Learning Organisation” were not widely felt (University of Natal Task Group, 1997:5).

The above report resulted in some cajoling encouragement from the Vice-Chancellor (Gourley, 1997:2), reflecting her recognition that University staff did not generally ‘own’ the strategic plan. In an attempt to motivate staff to cooperate she referred to the need to give “serious thought to what they want this University to be” and to the strategic plan and new government policy. She introduced threatening undertones in reference to re-structuring and down-sizing initiatives as “financial imperatives”. At the same time she appealed to staff to demonstrate the will to change “never quite so necessary as now” and to consider “not only just how high the stakes are but how great our contribution can and should be” to our province and country (Gourley, 1997:4).
The Vice-Chancellor's plea demonstrated the difficulties of providing leadership and facilitating rapid, far-reaching, multi-fronted change in a situation where reporting structures did not promote widespread co-operation, accountability and vision sharing. Clearly a sense of 'ownership' could not be imposed. Cynicism about the vision and scepticism about its implementability abounded, particularly amongst academics who had exercised their freedom not to participate in vision-building processes and who felt no obligation to do so. They continued to perform their teaching, research and administrative tasks under increasingly taxing conditions and assumed the University's drop in academic standing was inevitable. They therefore resented the change. For the majority of academics who did not engage broadly in curriculum development projects, there was little chance that they would experience how new teaching methods could enhance learning and, in fact, raise standards, as experienced by our accounting lecturers, and discussed on page 344.

The problems illustrate how the University structures and liberal culture of individualism were not conducive to change, even in the situation of our faculty where there was a supportive and visionary Dean as well as a Vice Chancellor urging change. The bureaucratic nature of the university and the associated staff mindsets thus inhibited the generation of the kind of internal momentum needed to harness the external forces for change and capitalise on the energy of the historical moment.

University Structures, Culture, Philosophy and Change

This section considers the kind of change that is possible in relation to the nature of universities and what makes university staff resistant to change, particularly focusing on prospects for curriculum reform. It assumes, moreover, that the general ethos, structures, staff mindsets and traditional curricula discussed in this chapter are fairly representative of many universities elsewhere. Our University's difficulties reflected the problems of 'top-down' organisations with their bureaucratic, indirect reporting structures
(Duke, 1992; Jarvis, 2001). These were found to inhibit the kind of change processes that could promote widespread creative responses to the learning needs of the students.

It was established above that mechanical change in response to bureaucratic, government requirements was efficiently implemented. The incentive of qualifying for state subsidy was sufficient to ensure course co-ordinators, enthusiasts or not, across all institutions, complied with new policy and bureaucratic procedures in registering their courses as OBE modules. The instrumental aspect of this task involved mainly a superficial reworking of the original courses rather than thoughtful change. On the other hand, the bureaucratic processes did not necessarily have to elicit unthinking responses, and enthusiastic practitioners could choose to use those procedural tasks as catalysts for creativity. They could use the opportunity to grapple with policy debates and curriculum issues and to interrogate their practices. The faculty workshops held in our University in April 1998, however, illustrated how academics, including heads of department, tended to ‘translate’ their course outlines into these terms as quickly as possible, prioritising form over substance. They thereby demonstrated a response that typified academics in such circumstances (Jarvis, 2001).

The changes were thus achieved with minimal critical reflection on issues like teaching, learning and assessment practices and new learner needs, in the light of the changing demographic breakdown of students. This meant the opportunity for academics to reflect critically and creatively on their practices was generally lost in the bureaucratic process (Brown, 2002; Jarvis, 2001). In this way government had the power to impose the procedure but lacked the power to engage academics broadly in thoughtful, formative curriculum transformation processes and to encourage them to use the opportunity to think in new ways about their curricula and students.

The liberal university culture of academic freedom, proudly upheld for traditional role in society for truth-telling and protecting democratic values
(Barnett, 1990; Brown, 2002; Duke, 1990; Jarvis, 2001, Brownhill and Jarvis, 2002; Maughan-Brown, 2002a) had the potential to promote social awareness. It also held some promise for promoting thoughtful, creative innovation and commitment to the 'good' of the university. This culture was also found to inhibit such democratic broad change, however. It gave academics space to choose not to engage intellectually with change plans through, for instance, meaningful collegial debate about matters like teaching and learning. In a context of academics' pre-occupation with burgeoning classes and diminishing budgets, where the culture and reporting structures incorporated little incentive or obligation to conform or participate, and traditional curricula prevailed, the liberal university culture thus hindered change.

Executive decisions were anathema to academics, as they were in other similar South African universities (Moore, 2000). In our University, the strategic plan was widely considered 'top-down' and therefore resisted, because academics had not engaged in the planning processes. Those who did grapple with issues of change generally did so voluntarily, from a minority position of idealistic frontier enthusiasm. As a result, South African historically 'white' English-speaking universities, like ours, have experienced an inconsistent spread of transformative initiatives with only pockets of participation in such processes over the past decade (Cross and Johnson, 2002; Moore, 2000; Pillay, 2002; University of Natal Task Group, 1997; Wallis, 2000).

University structures, in fact, restricted the capacity of scattered groups of enthusiasts to effect the changes they envisaged and sustain the innovation. Despite the recognised need to develop transdisciplinary programmes, reflecting the global market demand for 'Mode 2' knowledge production (Gibbons et al, 1994) and its local relevance for addressing South African and global societal problems, there was little support for them. The enthusiasts initiated and grappled with hasty, collaborative, transdisciplinary curriculum reform processes, which relied on participants' strong commitment to the joint
endeavour. Structures, culture, philosophy and practices could not support associated programmatic organisational structures, processes, discourses and resources that cut across disciplines. While pockets of effective innovation emerged in this manner, they were achieved at high personal cost to academics with enormous workloads and pressures. These academics faced mental, physical and emotional exhaustion as they experienced the unsustainability of such curriculum innovation (Green, 1999; Moore, 2000, Pillay, 2002).

On the other end of the scale were large numbers of academics less enthusiastic about confronting fundamental change and typically reluctant to face the 'unknown' (Jarvis, 2001; Makgoba, 2002a) as demonstrated by the small numbers of ‘mainstream’ academics who participated in staff development workshops (Searle, 2000). By asserting their right to choose not to participate in these and other democratic, transformative processes of deliberation and debate, they applied negatively the notion of academic autonomy. The liberal culture meant they could elect, for instance, not to develop their curricula to meaningfully reflect the thinking behind new government policy or their universities' curriculum reform initiatives, thereby resisting and, in fact, obstructing progressive change.

Conservatism, personal interests and fear could thus be used to subvert the noble values of ‘academic freedom’. Behind such resistance was often a fear of change (Jarvis, 2001; Makgoba, 2002a), specifically the threat of lowering standards in relation to admitting under-prepared students. This was particularly evident amongst academics who had not engaged with strategies to counter the threat. There were also personal insecurities in that subject-specialist academics were rarely qualified in education and generally had only a practical knowledge of curriculum. The university culture had never required staff to conceptualise their teaching methods formally and explicitly and certainly not within a theoretical framework. In the case of our University, non-traditional learning opportunities were envisaged through the strategic plan, but their implementation relied on academics’ personal motivation and
interest. The existing structures and culture provided little support or incentive for participating in 'staff development' sessions in a context of heavy workloads. At the same time, the university structures lacked the 'teeth' to promote a sense of accountability or obligation to reflect critically on their teaching practices. There was thus neither enough 'carrot' nor 'stick' incorporated in the liberal university culture or structures to promote curriculum deliberations or other processes for fundamental change.

While the value of organisational theory was recognised by the University Executive as a means of implementing institution-wide change, the structures and culture hindered its broad application, preventing fundamental, thoughtful, rapid widespread curriculum transformation.

Difficulties in Becoming Learning Universities

In a rapidly changing world, where universities experience unrelenting pressures for change, they need to find ways of responding creatively to these challenges. The above sections indicate the effectiveness of learning organisational theory (Senge, 1990) for implementing rapid change, but also obstacles to universities adopting these principles. This section explores some reasons for universities' difficulties in overcoming these barriers in the light of learning organisational theory.

Drawing on Senge (1990) and a report produced by Richard Bawden for the University of Natal, the University Executive argued that staff's commitment to change was vital if the institution was to achieve its transformation goals. It recognised that commitment to "learning about the new demands and learning the skills required to meet these demands" (University of Natal, 1994:3) was also essential, reflecting Senge's (1990) disciplines of team learning, building shared visions and personal mastery. The strategic plan thus reflected the need to learn how to access people's commitment and
capacity to learn at all levels within the organisation. This was, however, more easily recognised than implemented, as revealed above.

Acknowledging the idealism of its plan the University Executive argued for its achievability within a knowledge-focused, teaching university community (Duke, 1992; Jarvis, 2001; University of Natal, 1994). The strategic plan incorporated arguments that ‘learning’ principles could promote learning amongst all associated with it, both across the University and in small units within it, thereby enabling the organisation itself to learn (Duke, 1992; Jarvis, 2001; Marsick and Watkins, 1990; Senge, 1990; University of Natal, 1994). Preventing the University from operating broadly as a ‘learning university’ however, was its failure to generate a momentum for change within the institution that could work in conjunction with the external pressures exerted by the country’s need and new government thinking.

In contrast, the division, discussed above, demonstrated the capacity of an organisation to implement rapid developments when there was synergy between internal and external change forces. The University’s transformation plans, underpinned by ‘learning’ principles and a holistic worldview, provided an effective framework for change that we experienced as empowering (Capra, 1983; Duke, 1992; Jarvis, 2001; Senge, 1990; Visser and Sunter, 2002; Zohar and Marshall, 2000). These principles framed the Dean’s and division’s leadership styles, our culture of critical reflexivity and democratic processes and structures and thereby supported rapid, relevant change (Senge, 1990). At the same time the faculty experience illustrates that a powerful, effective ‘learning leader’ was insufficient to ensure broad curriculum reform in ‘other’ faculty offerings. (The Dean was, nevertheless, able to achieve agreement from the faculty board to integrate the course studied into the ‘package’ of courses, as a compulsory component). The whole University experience similarly demonstrates that the committed Vice-Chancellor and the strategic plan, with its underpinning learning organisational theory were insufficient forces for ensuring institution-wide change was implemented,
when staff did not 'own' them and structures and culture did not provide the conditions that would sustain them.

This highlights the difficulties of universities relative to business corporations in implementing 'learning' principles and change. Complicating are universities' more nuanced 'bottom lines' and 'visions' and the extent to which they can therefore expect co-operation from their staff in achieving them. Our University's new Vice-Chancellor, for instance, recognised that staff's limited 'ownership' of the strategic plan had hindered institution-wide change. He recognised that leading a university meant managing the 'chaos' of diverse ideas associated with academics, transforming them into "creativity and innovation" (Makgoba, 2002a:2) and likened the task of running a university to "herding cats" (Makgoba, 2002a:1). Universities generally lack the kind of culture and capacity associated with corporations (with their expectations, incentives and rewards relating primarily to the financial bottom line) that ensures employees would, at least, all participate in 'learning' or vision-sharing processes planned by the Executive.

A fundamental obstacle to our University's capacity to operate as a 'learning university' was the lack of broad commitment to the concept and to the 'learning' processes on which its success depended. Since academics were able to choose not to engage in vision building and other planning processes, they generally demonstrated little 'ownership' of, and enthusiasm for, the vision, mission and plan. In Kemmis' terms (1998:159) our University generally lacked the "communicative space" for critical debate or "conditions necessary for people to enter communicative action together" (Kemmis, 1998:159) or to engage intellectually, interactively and collaboratively in considering how best to meet the challenges it faced. It thus lacked the accountability structures and culture to ensure staff would participate and could therefore develop a sense of 'ownership' and co-operative commitment to the strategic plans for change. The existing structures and culture could neither sustain enthusiasts nor oblige less committed academics to participate in 'learning' deliberations and change processes.
The above experience of collaborative work with accounting lecturers demonstrates how staff were unexcited about the vision and plan for curriculum reform until they learned about experiential teaching approaches and observed their impact on students' learning. The 'deliberative space' created between those lecturers and our programme therefore enabled the lecturers to develop new teaching skills and a new interest in student learning, thereby enhancing their 'ownership' of the University plan. This example demonstrates the cyclic interdependence of the conditions needed to promote and sustain 'learning' principles.

Conclusion

In this chapter we have seen that the conditions under which the division operated were enabling to change and, in fact, made possible the implementation of a non-traditional curriculum and therefore the case study findings. The effective application of organisational theory by the 'learning division' relied on the set of mutually supportive conditions under which we worked. The inner dynamics of culture, structure, leadership and philosophy synchronised with the outer forces of the country's euphoria and socio-political need for change. In contrast, universities' broad failure to respond creatively to the pressures to transform was related to bureaucratic structures and cultures that inhibited the generation of the kind of synergy between the internal and external change forces.

We have thus seen that the faculty and University, in which this study is located, have generally shown little enthusiasm for implementing new curricula to better meet the students' learning needs. The statistical analysis of comparative performance of 'our' students compared with 'others' in Part Three's Introduction demonstrates the continued relative under-performance of 'other' students who were exposed to traditional curricula alone.
The continued better performance of 'our' students over five years thus strengthened the conclusion that the experience-based curriculum had affected the outcomes, and hence the hypothesis that there might be possibilities for replicating the case study findings elsewhere. We have seen in this chapter, however, that this could only occur in the context of a changed university. In view of the difficulties our University and faculty experienced in implementing curriculum reform, even with strong champions for the cause like the Dean and Vice-Chancellor, I am forced to conclude, therefore, that it is unlikely to happen. Without new factors that might enable internal and external forces for change to operate in the same direction, it is doubtful that universities would manage to free themselves from their bureaucratic structures, and associated cultures and mindsets, to accommodate the broad implementation of experience-based learning opportunities. If they did, however, there would still be another problem confronting us, as set out below.

Having considered why it is unlikely that the curriculum would be replicated elsewhere, we need now to look at the second issue arising from the replicability question. That is the question of whether the single case study's findings might have some wider applicability, in terms of the problem of generalising from the particular in this kind of research. The question assumes that the university context did change and did therefore provide an opportunity to replicate the case study findings. We will consider this problem in the next chapter.
CHAPTER TEN

POSSIBILITIES FOR CASE STUDY'S WIDER APPLICABILITY

In the previous two chapters we have looked at the first two problems with which the case study findings confronted me. We are now left with the problem that case studies are unique and the last research question, which is:

*Can the case study findings have wider applicability?*

This concerns the wider applicability of the case study research itself and is closely linked to the previous exploration of the prospects for replicating elsewhere the findings from a single case study. It was suggested that they might only be replicable in a changed university context where there were learning conditions similar to those discussed in the case study. For purposes of considering the findings' wider applicability, however, we need here to assume, first, that the university had been able to change enough to accommodate this kind of learning, before considering the practical implications.

Within this framework we are thus going to explore the possibilities for generalising the case study conclusion that the curriculum was an effective tool in enhancing learning, in order to help me address the central question about the conditions under which this kind of learning could occur. We are therefore going to look first at possibilities for strengthening the case study conclusions, by drawing on the data and experience gained from the five repeated implementations of the course, discussed in the Introduction to Part Three. Second, we will draw on the conclusions of the previous chapter to
consider the possibilities for implementing this approach elsewhere, in practice. For this purpose the chapter is divided into two sections, which are:

- case study conclusions strengthened;
- possibilities for wider applicability in practice.

**Case Study Conclusions Strengthened**

This work makes no claim that the case study findings can be generalised from a single study of this nature. Through the discussion of the method in Chapter Three, however, I argued that the case study was valid in itself in the time of the initial course implementation. It represented a unique event in 1997, in an unrepeatable time in South Africa’s history and lacked the ‘validity’ of a widespread study of different populations and quantifiable conclusions. The purpose was not, however, to view our students as a ‘scientific’ representative ‘sample’ and to draw statistical generalisations that could be applied to other groups of students in different contexts, but to portray a rich and nuanced picture of the practice, as explained in Chapter Three.

In this section I argue, nevertheless that it might well be too simplistic to suggest that the conclusions entirely lack applicability to different contexts. This argument is strengthened by subsequent implementation experiences involving changes to the course context, new student profiles and the informal implementation of the course in a different context. These experiences represented, in a sense, the breaking down of the case study’s uniqueness, and are discussed below in three subsections, which are:

- Changes in the course context.
- Changes in student profiles.
- Implementation outside the division.
Through this discussion we will see that the case study conclusions were strengthened by the experience of the five years after the initial course implementation and that there were grounds for suggesting the findings might have wider applicability.

Changes in the Course Context

The curriculum was repeated five times, in changing circumstances, with each implementation incorporating developments informed by lessons learned and by the rapidly changing context of the newly liberated society. Amidst these course adjustments 'our' students continued to achieve significantly better grades across all first-year courses than 'other' students (see the statistical data on page 307 and Appendix 3). They also continued to give similar qualitative feedback on both 'our' curriculum and 'mainstream' courses. Although it is recognised that these data do not amount to proof that there would be similar learning outcomes in the sixth year, I suggest that they have given strong grounds, nevertheless, for arguing quite strongly that the thesis might be applicable to contexts beyond our programme. In any event the subsequent data and experience were used to justify our experimentation with the curriculum, in 2003, beyond the confines of the division.

The following changes were made. First, the programme evolved over time, as described on page 79, in response to broad socio-political changes and global realities. The modifications included compressing the degree structure from four to three years, thereby increasing the workload and related 'pressure' for later student groups. While the 1997 cohort read three to four level 1 courses in their first year, the 2002 students read all five level 1 courses that were the norm for 'other' students. In addition, however, they read a sixth course (that under study), which was unavailable to 'other' students, increasing the load for 'our' students. This group also experienced less contact time with programme staff than previous students, because of timetable restrictions. Second, there was a change of facilitator (when we had
considered the 1997 course's success heavily dependent on our first facilitator). Third, ongoing, iterative improvements were made to the course based on the case study's conclusions and ongoing critically reflective processes.

Change in Student Profiles

With each year the student profiles grew increasingly different from that of the 1997 group, with the 2002 class reflecting the greatest change. More than a third of that class had experienced better schooling. Thirteen (38%) of the 2002 students had come from multi-cultural school experiences in previously 'white' and currently still 'advantaged' schools, while the 1997 group were almost entirely from previously 'black African' schools, with their problems discussed on page 37.

The 2002 experience, for instance indicates that 38% of the class were less educationally disadvantaged since they had attended relatively well resourced, multi-cultural schools. Appendix 3 illustrates a new divide in this group, since 'our' 2002 students from relatively advantaged schools achieved better grades than the students from poorer schools did. Both groups achieved markedly better grades, nevertheless, than 'other' students mainly from relatively advantaged schools and socio-economic backgrounds ($\chi^2 = 27.214$, p<0.001 for our whole 2002 cohort; $\chi^2 = 4.077$, p<0.05, for the 'disadvantaged' group; calculations in Appendices 31 and 32).

Aside from the good grades, qualitative feedback from the more 'advantaged' students of the 2002 group indicated strongly that they experienced the course as beneficial, without being 'remedial' or 'patronising' in nature. This recalls the course plans, discussed in Chapter Four, through which we sought to develop a course that held possibilities for different groups of learners (team meeting notes, 21 April 1997). This involved a curriculum philosophy and aims that avoided the kind of patronising approaches associated with
earlier ‘academic support’ initiatives in South African tertiary institutions. Disregarding the prevailing hegemony, these interventions were generally remedial in nature, based on the assumption that curricula should remain the same and ‘under-prepared’ students should be helped to cope with them (Frame, 1992).

Implementation outside the Division

Prospects for the case study conclusions’ wider applicability were also strengthened by a subsequent experience. Anecdotal evidence from implementing the curriculum in 1998 for learners in a highly privileged sector of South African post secondary education suggested that the approach was an effective means of enhancing learning in its specific context. The Economics department of an elite, private, independent school used the scenarios to enrich the Economics course run for its mostly white, economically and educationally privileged post-matriculation class. Staff reported that both the content and teaching and learning processes induced fun-in-learning, reflection, independent thought and debate amongst their post-matriculation class (Bantjes, 1998), suggesting wider applicability of the thesis that the approach affected the learning outcome. Bantjes (1998) also reported benefit from implementing the scenarios in different ways appropriate to various levels within the school, commenting on their capacity to trigger thought and argument even amongst the younger children.

This section has thus shown how the thesis has drawn on both a single case study and subsequent repetition of the course under similar conditions, to argue that given appropriate learning opportunities, students might well achieve better marks. We have seen how the experiences of the succeeding five years have strengthened the argument. This work therefore holds some promise for the possibility of generalising its findings from the particular circumstances of the 1997 curriculum implementation, applying the thesis more broadly from a single case study. It is recognised, however, that the
wider application of the curriculum occurred in contexts that had important fundamental similarities to those of the case study. Consequently, it is acknowledged that the potential for wider applicability elsewhere, diminishes in relation to increasing differences in contexts and this is discussed below.

**Possibilities for Wider Applicability in Practice**

Having shown above that there are possibilities for generalising from the particular in case study research, we need to recognise that the findings have been repeated only where the learning conditions have been fundamentally similar. This is considered in terms of the discussion of the previous chapter, which showed that traditional approaches to teaching and learning still dominated the faculty and the University curricula, to demonstrate the need to consider the findings' wider applicability in practice.

First, we consider the learning conditions that were common to each instance in which the course has been implemented. The course continued to provide the core curriculum elements over the five years, despite the difference in each implementation discussed above and in the Introduction to Part Three. Remaining the same were the course philosophy, aims and objectives, central to which were the promotion of critical reflection and the provision of a supportive, learner-centred environment. In addition, there was continuity in our division in terms of some of the staff and of the kind of assignments and assessment used. In the instance of the school experience, there were polar differences in socio-economic status and between the circumstances of the above post-secondary learners in school and those in the case study, but there were also some important fundamental similarities. The learning environment for instance was underpinned in both cases by a philosophy of 'whole student learning', a nurturing, caring ethos with small groups of learners and opportunities for interactive learning.
Having considered the learning conditions that were common to the repeated implementations of the course, we need to consider how generalisable the case study findings might be in practice, and we draw on the discussion of Chapter Nine to answer this question. We have seen the difficulties the University had in implementing new curricula and we have noted the faculty's continued traditional approach to teaching and learning. We have seen also in the case study and in the discussion on experience-based learning in Chapter Eight, how much is involved in creating those learning conditions and how difficult it would be for departments to change enough to accommodate such non-traditional approaches. While this work has indicated that given the appropriate conditions the case study findings might be generalisable, it has also shown that given normal university conditions they probably would not.

Conclusion

In this chapter I have argued that the case study conclusions and the thesis might well have wider applicability and would be most applicable in contexts that had the most in common with the circumstances of the first curriculum implementation of 1997. I hence suspect that the same kind of improved outcomes might be achievable elsewhere, if there were similar learning conditions supported by the same kind of course philosophy and approach, interests, circumstances and resources. The hypothesis is now testable in other contexts, including our own 2003 and 2004 contexts\footnote{For 2003 the course is being further developed for both ‘our’ students and about 100 Bachelor of Business Science students, considered elite in the faculty in terms of admission criteria. (Thereafter it is to be developed as a compulsory core course for about 600 first-year students in the faculty). It is to be extended over 4 semesters, with the first semester core course followed by three semesters in which its aims and objectives will be embedded in three consecutive semesterised modules in Economics, for about 1000 students.} recalling the Dean’s interest from the beginning in the practice’s possible applicability for other students in his faculty. We have yet to learn how applicable the case study’s conclusions will be to these different contexts.
At the same time I have argued before that it is very difficult for universities to change and suggested that it would be hard, even for departments in our faculty, with a supportive Dean, to change enough to accommodate experience-based learning. They do not have the kind of opportunities for, or interest in, curriculum development that enabled the division to implement the course studied. Hence I suggest that even if the case study conclusions could be applied elsewhere, the likelihood of this happening, in fact, is small. Therefore the question of wider applicability might well relate to an ideal rather than a practical possibility.

Having looked at this question we have now addressed the last of the problems with which the case study confronted me. We are now in a position to move to the final part of the thesis to look at the conclusions, strengths and weaknesses, recommendations and suggested areas for future research and will do so in the next chapter.
CHAPTER ELEVEN

CONCLUSIONS, RECOMMENDATIONS AND THE WAY FORWARD

This thesis has taken us through a journey that reflects my own academic journey from the descriptive analysis of the South African context and the University's response to it in Part One and the single case study of Part Two. The latter included an exploration of the research method and of the PBL literature which revealed the approach provided an inadequate theoretical framework for the curriculum as discussed in the previous three chapters. This represented the work's beginnings as a Masters dissertation. The thesis then entered a more reflective, theoretical stage where the case study conclusions were problematised through the three questions posed in the 'double-loop learning' phase (Argyris and Schön, 1974; Schön, 1983, 1987) of Part Three. These concerned: learning; the university as the learning context; the wider applicability of case study research, representing the work's development into a doctoral study. Having followed the way this thesis has progressed, we are now in a position to bring it to a close and we will do so in six sections, which are:

- The thesis purpose and conclusions.
- Unintended lessons learned.
- Recommendations.
- Limitations and strengths of the work.
- Future research.
- Future vision.
The Thesis Purpose and Conclusions

In this section we will explore the conclusions that can be drawn in terms of the purpose of this thesis and we will do so in three subsections which concern:

- Learning, both problem-based and experience-based.
- The case study's replicability in the university context.
- The wider applicability of case study research.

The purpose of the thesis was initially to evaluate a course, through a single case study, in relation to the aim to provide the kind of learning opportunities that would meet the needs of black African students from restrictive school and socio-economic backgrounds. In the second research phase the purpose was to problematise the case studied and it was here that the justification of the findings became more significant, and the hypothesis, that the conditions under which this kind of learning occurs can affect the outcome, strengthened. This phase involved reflecting on the learning and the curriculum studied, in terms of an African response to a rapidly changing context and the aim to promote free thought; their replicability considering the conservative nature of universities; the wider applicability of the case study itself.

The main conclusion of this research comes in the form of a hypothesis that certain learning conditions might very well affect learning outcomes. It is informed by the case study through which I showed that a particular curriculum implemented in this way could enable effective learning to occur and the outcome therefore to be improved, relative to students exposed only to more traditional curricula. The hypothesis based on the case study is then strengthened by the conclusions below.
Learning, both Problem-based and Experience-based

Problem-based learning was too narrow a concept to frame the kind of learning conditions we provided for our learners. It became clear that what was termed PBL in the case study reflected experience-based principles and learning through wider experiences rather than the kind of problems associated with PBL. The concept of PBL was too ‘Western’ to accommodate the ‘other-centredness’ of African culture, the emancipatory purpose and the aim to promote free thought, incorporated in the approach. The literature critique exposed this limitation against a different culture and in doing so it might possibly have begun to expose this narrowness as a shortcoming of the concept itself.

The case study demonstrated the statistically significantly better grades of students who had been exposed to experience-based learning compared to those who had not, as discussed in Chapter Eight. What the ‘other’ students had in common, was a traditional, pragmatic, content-based Management Studies curriculum. Based on this I suggest (and thereby accord with a wide literature) that Management Studies learners need more than content knowledge and didactic teaching methods to develop the kind of intellectual ways of knowing, discussed in the case study and Chapter Eight, specifically on page 330.

Statistical support for the hypothesis that the curriculum enhanced learning is provided below, but there was also important qualitative evidence. There were, for instance, lecturers’ comments on how much they enjoyed teaching the students and appreciated the quality of their questions and interactive participation in learning processes relative to other students, raised on page 247. Students reinforced this finding with their observation that ‘other’ students, especially but not only black Africans, were fearful about expressing their views in class, as discussed on page 196, and that the course had helped them develop self-confidence and communication skills which had enhanced their learning.
The hypothesis is strengthened by the repeated better performances of first-year students from 1997 to 2002, noted above. Further supporting the hypothesis is the analysis of the 2002 cohort's better performance, in relation to the changes in context discussed on page 383. The calculations of Appendices 30 and 31 show statistically exceedingly significant relationships between taking our course and achieving distinction, in the form of the Dean's Commendation, in both 1997 (test statistic: $\chi^2 = 42.902, p<0.001$) and 2002 ($\chi^2 = 27.214, p<0.001$), with the 1997 test showing slightly higher significance.

The 2002 group comprised more students from relatively 'advantaged' schools than before, and Appendix 3 graphically illustrates the breakdown and relative performance of the 2002 students from each kind of schooling background. It shows that even our 'disadvantaged' group performed statistically better than 'other' students did ($\chi^2 = 145.865, p<0.0001$; calculation in Appendix 29), although 'our' students from better schools achieved still better grades than those from the historically 'disadvantaged' 'black African' schools. (These were still exceedingly poor in 2002, as discussed in Chapter One. In contrast, 'other' students' socio-economic and educational background gave them every opportunity to perform better than 'our' 'disadvantaged' students did. The 'other' students were mostly from relatively 'advantaged' schools, in view of the continued relationship in 2002 between race and socio-economic advantage, as discussed in Chapter One. The racial breakdown of faculty students is given in Table 10 of Appendix 22).

Findings that further support the hypothesis are related to improved performance in level 2 and level 3 accounting courses in 2001 and 2002, once some experiential learning principles were applied. Chapter Six showed that while the 1997 cohort of students performed significantly better in level 2 courses ($\chi^2 = 36.320, p<0.001$; see Appendix 33 for calculation) this significance was less, relative to their performance in level 1 courses ($\chi^2 = 259.766, p<0.0001$; calculation in Appendix 23).
Later years saw a significantly better performance in Accounting level 2 and level 3 courses, however, when a more experiential teaching and learning experience was introduced. This is demonstrated through the test statistics for level 2 Accounting, in 2001 ($\chi^2 = 8.649$, $p<0.05$; calculation in Appendix 35) and for the three combined level 3 courses of Accounting, Managerial Accounting and Finance, and Auditing in 2002 ($\chi^2 = 2.757$, $p<0.1$; calculation in Appendix 37). The graph in Appendix 21 illustrates the improvement, relative to 'other' students, between the 1997 cohort's comparative performance in these level 3 courses, and the 2002 performance. Whereas 'our' 1997 students were less likely to perform well in these courses ($\chi^2 = 20.3$, $p<0.005$; calculation in Appendix 34) the statistical relationship was reversed in the 2002 courses. The statistical analysis showed 'our' students were more likely to achieve marks over 60% and less likely to achieve marks under 60% than other students, in the above level 3 courses in 2002 ($\chi^2 = 2.757$, $p<0.10$; calculation in Appendix 37). The fourth level 3 accounting course, Taxation 3 was not included in these statistics since students found the course accessible and we therefore did not intervene in the Taxation 3 curriculum. The test statistic for all four level 3 courses is included ($\chi^2 = 4.564$, $p<0.10$; calculation in Appendix 36), nevertheless, to demonstrate its similarity with the above, though it showed very slightly higher significance.

A member of our staff has worked over the past five years to improve the teaching and learning experience in these accounting 'extension tutorials' (part of the broad curriculum described on page 84) taught by mainstream staff from the Accounting Department. This focus in her work related to her interest in 'Mode 2' learning and informed her doctoral thesis (Skinner, 2002a). She reflected on the difficulties we had in helping our students from the 1997 cohort perform significantly better than, or even, in some courses, simply as well as 'other' students, as reflected in Table 5 on page 231. She reported repeatedly on the challenge of changing accounting lecturers' mindsets about teaching and learning and therefore the methods they adopted in the 'extension tutorials'. She found the tutorials lacked focus on
learner needs and learning processes with the immense volume of content material and tutors' perception that they had to 'cover' it in these classes (Skinner, 1998c; 1999b, 2000) driving their approaches.

In 2001, however, Skinner (2001a) reported a breakthrough in the Accounting level 2 'extension tutorials', (part of the broad curriculum described on page 84), in terms of a willingness to apply a more experiential approach. This intervention was reflected in the improved performance of 'our' students relative to 'others' discussed above. Skinner (2001a) was, nevertheless, dissatisfied with the extent to which new methods had been implemented. She argued that a matching change in assessment methods, as discussed on page 345, was still missing. Tutors were still prone to talk more than they should, to focus too much on content material and to give students too little time to think independently, indicating the need for staff development recommended below.

Similarly, she reported in 2002, a relative breakthrough with tutors of 'extension tutorials' for the level 3 Auditing, Managerial Accounting and Finance, and Accounting courses (Skinner, 2002c), in terms of an increased willingness to focus on "cognitive skills" to ensure that students learn to "contextualise, problematise, articulate and communicate" new knowledge (Skinner, 2002b:1). She complained again, however, that the intervention reflected only a partial application of experiential learning principles and the statistical test discussed above, while very significant, reflected her view that further work was needed in order to enhance its effectiveness.

These statistics thus further strengthen the hypothesis that experiential learning (as discussed in Chapter Eight) is an effective method for Management Studies students. First, the better performance of second- and third-year students, relative to 'other' students, occurred once there was a shift in teaching methods in 'extension' tutorials that were held for 'our' students but unavailable to 'other' students. The method was thus common to the first-year students who also produced significantly better grades. The effect of the teaching method itself was also isolated to an extent from the
nurturing, learner-centred environment of first-year students, since second- and third-year students had no regular or formal contact with programme staff, and therefore enjoyed far less moral and emotional support from us. What these level 2 and 3 accounting courses had in common with their first-year experience was thus an experiential learning experience.

Empirical evidence discussed in the case study and in Chapter Eight reinforces the above statistical data and the conclusions below about the case study reflecting 'adult education' teaching methods. These have long been established as effective in other contexts strengthening the hypothesis that the curriculum was effective in enhancing learning. The qualitative data strongly suggest that students' academic performance reflected the whole transformative, learner-centred experience illustrated in the Student Development Model on page 164. Experiential learning was thus linked to the concurrent personal, academic and intellectual empowerment of students. The evidence strongly indicates, for instance, the value of conceptualising learning as biography and a liminal experience, adopting democratic teaching styles and selecting effective learning processes and course content. In this way a positive relationship was found between academic performance, experiential learning, and critical reflexivity within a critical community of students, as considered on pages 92, 159 and 340 pursued below in relation to the programme's leadership style.

The above statistical evidence is hence augmented by empirical data. Together they strengthen the hypothesis that experiential learning represents a curriculum approach that might enhance learning in other comparable contexts as considered below.

The Case Study's Replicability in the University Context

The case study and the data and experience from the succeeding five years, elaborated below, give grounds for suggesting that the case study conclusions could be replicated elsewhere. At the same time, drawing on the
problems discussed in Chapter Nine, there is a cautionary caveat that this could only occur in a changed university context. It points to the fact that some fundamental features of the learning conditions were common to each implementation and that these are difficult to provide. These included the programme’s underpinning philosophy and leadership style, the related learner-centred, democratic teaching style and method, and staff’s concern for students’ wellbeing that went beyond the classroom.

The hypothesis acknowledges that it is very difficult for universities to overcome the factors inhibiting change and transform themselves, even when there are factors, including strong champions, conducive to change. Another reality haunting this hypothesis is how demanding it is on staff and other resources to provide this kind of ‘whole student learning’ environment. The positive theoretical hypothesis is thus linked to the negative practical reality that the universities’ inability to do so might very well prevent the findings’ replication elsewhere. It would require universities to free themselves from their bureaucratic structures, culture and related mindsets and depend on adequate human and other resources, as explained in Chapter Nine.

Lessons learned from our experience of rapidly developing the course and programme as a ‘learning division’, discussed on pages 79, 303 and 351, largely validated the claims of learning organisational theory. They also indicated, however, that it was enormously difficult to implement ‘learning organisation’ principles in the university context. The structures and culture prevent the generation of the required internal momentum for change to work in synergy with external forces, even when there is substantial internal and enormous outside pressures for change. This was raised in Chapter Nine, in relation to Part One’s contextual discussion and suggests that it would be difficult for universities to operate as ‘learning universities’.

While outside pressures might be insufficient to mobilise staff broadly to engage in change processes, scattered, internal responses are also unsustainable without the kind of conditions, discussed on page 351, that are conducive to ‘learning’ and therefore to change. The above circumstances
that might promote and support 'learning' principles are generally rare in universities and are inhibited not only by inadequate resources but also by their 'top-down', bureaucratic structures and cultures. These might indeed represent the principle obstacles to democratic change (Duke, 1992; Jarvis, 2001), hindering the kind of 'learning' that needs to take place at all levels in a 'learning university'. Hence I suggest universities will be unable to sustain a 'learning' environment across the institution and accommodate broadly new approaches to teaching and learning in their current form. This means that the case study conclusions are unlikely to be replicable in practice even though I suggest strongly that they could theoretically be applicable elsewhere.

The Wider Applicability of Case study Research

While the single case study was clearly unique, the data and experience of the succeeding five years suggested that the findings might have wider applicability. I therefore suggest that it might well be too simplistic to suggest the conclusions lack applicability to different contexts. Assuming that the university context could accommodate a non-traditional curriculum approach of this nature, the case study might very well have wider applicability.

Over the years since 1997 the course continued to provide the same kind of learning conditions and continued to achieve the same type of learning outcomes, strengthening the hypothesis that there might be a relationship between the two. At the same time there were some changes to curriculum components, like the facilitator, the academic workload, the student profile, contact time with staff, as discussed in Chapter Two and in the Introduction to Part Three. This suggests the importance of the continuous thread of elements core to the conditions provided through each course implementation, like the teaching style and method and 'whole student' learning approach.
Between 1997 and 2002, similar qualitative feedback was received from students and staff from within and outside the division. Comparably better grades continued to be achieved by our students relative to 'others', with the statistical significance ranging from extremely significant in 1999 and 2001 to exceedingly significant in the other years. (The test statistics over the years were as follows: for 1997, $\chi^2 = 259.766$ (p<0.0001); 1998, $\chi^2 = 215.867$ (p<0.0001); 1999, $\chi^2 = 32.250$ (p<0.001); 2000, $\chi^2 = 121.873$ (p<0.0001); 2001 = 49.998 (p<0.001); 2002, $\chi^2 = 269.309$ (p<0.0001), and their calculations are demonstrated in Appendices 23 - 28). At the same time qualitative student feedback about the course experience each year remained similar, with small differences indicated in Part Three's Introduction.

Based on this I suggest that other Management Studies students, given an environment reflecting the aspects of the practice that remained common throughout, might well achieve the same kind of improved outcomes. These would include a similar learner-centred, critically reflective environment, with comparable learning opportunities, as discussed above.

Adding some weight to this hypothesis, though it is yet to be tested, is the support of other stakeholders in the new course being piloted in 2003. They include on the one hand the team of experienced South African academics, who acted as course 'consultants' during its initial development phase, and the new appointee to the course co-ordinator post, a linguistic specialist experienced in academic development in Higher Education. Adding further weight is the Dean's confidence that our work has wider applicability for all his Bachelor of Commerce and Bachelor of Business Science students, will enhance their academic performance and will provide an effective means of participating in the university-wide initiative to promote English language proficiency.

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15 Specialists in academic development, linguistics, critical literacy and curriculum from Universities of Cape Town, Durban-Westville, Natal, the Western Cape and Witswatersand, and agencies outside institutions were consulted.
This confidence is demonstrated through his investment in, *inter alia*, the consultants, a new permanent post, a library facility and the faculty-wide adjustment to curriculum rules and timetable to accommodate a compulsory new course. Moreover, the comparatively limited success and popularity (with students and staff) of one of our University’s 2001 / 2002 language proficiency initiatives (Balfour, 2002) strengthens the argument for the relevance of our educational approach which goes beyond, but includes, a linguistics focus.

Hence this case study research might well have wider applicability in our Faculty of Management Studies, as we will soon be able to research, and perhaps in other similar faculties in South Africa and beyond, where practitioners are seeking to enable students to think independently. I would also suggest more generally from the above, that case study research holds some promise for advancing understandings beyond the unique situation studied, hence universities might consider promoting this kind of research.

It bears repeating, however, that the wider applicability of the case study conclusions might be considered an ideal rather than a practical possibility, in view of the difficulties universities might have in changing enough to accommodate this kind of approach.

**Unintended Lessons**

Having considered the above conclusions we will now look at four related unintended lessons that were learned incidentally during the research process. They concern the value of practitioner-research; teamwork and multi-cultural teams in course development; ‘whole student learning’ for learners’ communities as set out below.

**Practitioner-research**

The experience of having undertaken this work as a practitioner-researcher (Jarvis, 1999) illustrates that practitioners can work at a doctoral level and that
the related "critical praxis" (Grundy, 1987:132) as defined on page 119, added rigour to the practice. It enabled the team to interrogate both practice and theory in relation to one another, to contextualise the practice theoretically, lifting our understandings and questions about the practice. My research made me step back as a researcher to reflect on our practice, making me more critical of the practice than I would otherwise have been, and more determined to learn as much about its strengths and limitations as I could. It thus augmented the quality of the practice, enabled me to grow into a more research-orientated practitioner and promoted learning amongst the course team.

In this way the research enabled me to portray the practice richly, in relation to radical constructivism or emancipatory curriculum theory, enhancing the 'trustworthiness' (Guba and Lincoln, 1983) of the study. It also enabled me to provide a coherent theory to frame our practice in terms of iterative, collaborative course, staff and student development. A second academic member of the team of four, was in fact also undertaking a doctoral study that related to our practice, further lifting the practice and the level of my reflections through ongoing interactive deliberations during the reflective phase. Moreover, this team-member enhanced the quality of my work through her role as critical reader whereby she checked my analysis of the case study during the writing process.

My work as a practitioner-researcher also provided an enriching experience to students. The evaluation processes demonstrated to students, through their involvement as co-learners in the case study, the notion of research as learning in relation to biography. Through conceptualising research as my own, and the team's, learning through the case study experience and involving the students as critical co-learners, we affirmed the value of students' independent thought, de-mystified and 'democratised' research, demonstrating it as an activity undertaken by any critically reflective learner.

The work thus might have implications for universities in terms of the potential worth of practitioner-research and its value for promoting staff, student and
curriculum development. It might, for instance, inform policies designed to encourage a culture of high-profile practice-related research amongst top-level academics, reward such research and thereby enhance teaching and learning, a hypothesis supported by Nicholls and Jarvis (2002).

**Teamwork**

The case study showed that the teamwork, with its critically reflexive deliberations, enhanced the quality of the course and the course development process. The multiple perspectives, talents, experience and knowledge enriched both process and product. One person working alone on a project of this kind would have lacked the opportunities and creative energy to deliberate, 'brainstorm' and test new ideas and would probably have lacked the daring to produce a course so different from the norm. The course's effectiveness was thus directly related to the team interaction throughout the course development process. This approach reflected the division's practice and underlying philosophy, however, rather than a theoretical grounding in collaborative work.

The experience revealed that multiple perspectives could bring contestation about the course and the adoption of different positions, as discussed on page 339, but that these could add value that far outweighed associated difficulties. A shared course philosophy and vision, as discussed on page 90 and more generally, in Chapter Four, was found to be fundamentally binding, empowering team-members to manage difficulties as they arose.

This work has also shown how an academic from outside the discipline can add value to collaborative course development processes. The case study experience revealed that academic team-members from outside the discipline added worth to course deliberations, as discussed on page 183. They played an important role, for example, in identifying gaps between theory, practical knowledge and learning. Similarly, the above experience of the accounting teaching 'breakthrough' occurred once the practitioner-researcher, education
specialist, from outside the field of Management Studies attended the various accounting classes, as discussed on page 342. Her distance from the discipline was an important factor in identifying barriers to learning accounting-related concepts that specialists, immersed in their subject, could not see without her analysis. Although the students had talked about their learning problems with her, she lacked the arguments to convince the lecturers that they were making false assumptions about what students knew and how they learned, until she had experienced it for herself. Clearly, to do this she needed the lecturers' trust in her motives and respect for her ability, which she had taken some years to cultivate.

At the same time, the case study indicated potential shortcomings of a course team where only one member was from the relevant field of study. It clearly reduces the scope for overlapping tasks, as we found on page 359, as the course team relied on the facilitator's academic knowledge for implementing the curriculum.

The above might have implications for practitioners and course development policies in universities. Policy-makers might, for example, consider the value of teamwork for reflecting on the needs of diverse learners and developing new approaches to teaching and learning that reflect a rapidly changing world (Jarvis, 2002c; Rowntree (1981). Course development teams might promote critical reflection and deliberation that are difficult to invoke through isolated work and could thereby enrich the learning opportunities offered through the curriculum. The process might also promote the kind of interactive deliberation that enhances subject-specialists' understandings of, and interest in, different approaches to teaching and learning. The value of teamwork might, furthermore, be considered in relation to the diversity of participants' inputs, including the multiple perspectives of team-members from different cultures, as reflected below.
The case study illustrated the enormous benefits of having a multi-cultural course team and complement of division staff in the course development, implementation and evaluation processes; the running of and implementation of change to the programme; and the provision of a nurturing, learner-centred environment. The insights of the course facilitator, for instance, with his particular set of life experiences mentioned on page 341, was found to be extraordinarily enriching to both the course development and classroom experience. They influenced, for example, the kind of practical knowledge he used to help students access new theoretical knowledge.

Aside from providing valuable perspectives on the appropriateness of expectations, priorities and policies in black African culture in our practice, black African staff enriched the team immeasurably and helped us provide the best learning environment we could. They helped to remove cultural domination and thereby enhanced the learner-centred nature of the experience. They also provided insights into cultural demands on students that enhanced staff’s ability to help students decide, for instance, how to balance the demands of home or community with pressures of university life. It also meant students could choose to confide in the Black African staff members about personal and domestic problems when this made them feel more comfortable or better understood. In this way the multi-cultural nature of the staff helped students deal with their problems. In addition it provided a useful role-model of mutual respect, openness, trust, dealing with difference and co-operation across barriers the students had scarcely seen crossed before, given the South African socio-political and economic context. It therefore provided, in itself, a relevant learning experience for ‘our’ students.

Very importantly for the course evaluation, furthermore, data were collected by all staff-members formally and informally. Since students could select their interviewer as the staff member with whom they chose to talk, race or gender barriers to communicating certain feedback could be avoided. Also, the team
cross-checked my interpretation of data to help avoid cultural misunderstandings.

These lessons might thus have implications for practitioners considering the kinds of teams that could enhance their curricula and course development processes and could help locate the work within the cultural realities of the learners.

**Experiential learning, 'Ubuntu' and Community Consciousness**

In Chapter Eight we considered the relationship between experience-based and 'whole student' learning and the capacity of a curriculum to accommodate non-'Western' culture in relation to the limitations of PBL for our approach. While aspects of traditional African culture, like 'ubuntu', consensus and particular respect for elders, were not theorised in this work they were strongly factored into our practice, underpinning curriculum decisions.

The case study and subsequent experience showed that in each cohort of students there emerged students with natural leadership qualities. These students particularly demonstrated a community consciousness and activism that made a strong impact on both university and wider community environments. In Chapter Eight there were reflections on the extraordinary community consciousness developed, particularly amongst our second- and third-year students. The numerous examples of selflessness and regard for the good of others both within the University and in their home communities, including the instances raised on page 365, suggested that the learning environment, teaching and leadership style, learning processes and choice of content all drew on, and promoted, a community consciousness.

Although elements of African culture like 'ubuntu', discussed on page 35, were not explored theoretically in this study, the concept was strongly integrated within the curriculum. This traditional 'other-centredness' might in any case have promoted the concern for others demonstrated by the students.
but the relationship between experience-based learning and African culture should be explored in further research. There were some strong indications that African culture was both harnessed and strengthened through staff role-modelling a sense of community and concern for others and through the curriculum assuming an 'other-centredness' in the students.

The 1997 students' positive participation as co-learners in the course development and evaluation processes, noted on pages 103, 193, 332 and 365, for instance, reflected students' interest in 'giving back' to the programme and enhancing the learning experience for future students. There were, however, increasing signs in latter years of a diminishing sense of community amongst first-year students, on arrival, and a creeping 'Western' individualism and competitiveness, as discussed in on pages 93 and 327. This reality suggests that the sense of 'ubuntu' might well have been re-kindled through the curriculum. It provided structures and space for ongoing student input and it also promoted an awareness of issues of social justice and students' personal development, including their self-confidence, as found in the case study. This led to the students applying their skills, knowledge and confidence in the variety of initiatives students took to help one another and their communities. (Related to this, however, are questions about the existence, the role and the value of 'ubuntu' in a changing political and socio-economic context that demand further research).

These lessons might have implications for universities seeking to enhance learning through opportunities for students to develop a critical, mutually supportive student community and social awareness.

**Recommendations**

Having considered the above outcomes of this work, we are now in a position to consider the recommendations that flow from them. These concern a curriculum theory for 'whole student learning'; changing university structures and leadership styles, focusing on our own faculty; and implementing staff,
curriculum and student development policies. The recommendations are presented in three subsections, which are:

- A ‘whole student learning’ theory for ‘whole student learning’.
- Faculty structures and leadership styles.
- Staff, curriculum and student development.

Based on the above conclusions and unintended lessons, the recommendations are necessarily tentative in that they involve application of the conclusions and lessons to different contexts, requiring further research. In view of the hypothesis about this work’s wider applicability, however, these recommendations might well be relevant to other Faculties of Management Studies and other universities more generally, particularly in South Africa, where there are similar circumstances and experiences. They might, therefore, lead to wider re-thinking of policies for, *inter alia*, enhancing student learning, promoting curriculum-related research and staff development.

The following changes are recommended on the assumption that governments and universities view as a priority the need to evolve rapidly in order to provide effective curricula in their changing local and global environments, and therefore prioritise these kinds of changes and allocate funding for this purpose. To this end these recommendations might be considered relevant to the Ministry of Education. Clearly the economies and priorities of many governments in the 21st century indicate the problematic nature of assuming funding will be made available for these kinds of changes, but their potential for enhancing learning and universities’ role in society might well be explored in economic terms. [Confronted with resource-related challenges, our course team are currently pondering course changes for the 2004 offering for over 600 students, informed by the 2003 pilot project (see Appendix 19). Determined to provide a learner-centred experience, within a new context and amidst financial constraints, we are seeking new ways forward. These include balancing the use of high technology, to promote both efficiency and one-on-one contact with tutors; large lecture halls; small tutor groups; effective experiential learning methods; relevant course material and
skilled, experienced, empathetic tutors with democratic teaching styles. The major cost factor will be the tutors. How we succeed or do not succeed might be a future research focus].

While it is acknowledged that the recommendations are idealistic in nature, they are made in a country where high ideals have enabled enormous transformation to occur. People have dared to dream and achieved a great deal, even though the changes might have fallen short of their vision. Similarly, universities should aim high in striving to keep abreast of the rapidly shifting contexts of the 21st century and engage in ongoing critically reflective processes. They need to recognise their vital role in producing competent, critically aware graduates who will contribute positively to both local and global ever-changing realities (Barnett, 1990; Brown, 2002; Duke, 1990; Jarvis, 2001, Brownhill and Jarvis, 2002; Maughan-Brown, 2002).

A Curriculum Theory for 'Whole Student Learning'

Since this thesis is about the implementation of a curriculum, it is appropriate that the first recommendation concerns a curriculum theory for 'whole student learning' that is supported by data from the case study and subsequent experience. It might have relevance to other contexts, specifically for practitioners seeking to provide a transformative learning experience at the start of a Management Studies curriculum, for under-prepared, culturally marginalised students, whose educational experience was typically teacher-centred and content-based. (It is being tested in 2003 in the context of a larger, multi-cultural group of students, from more advantaged schools, in preparation for the large-scale delivery from 2004 for over 600 students, a point that prompts the 'Future Vision' below).

This theory of learning draws on the case study data and subsequent curriculum experience, the Student Development Model on page 164, Jansen's (2001) definition of an 'intellectual' on page 91 and underpinning radical constructivist philosophy discussed on page 90 and in Chapters Four.
and Eight. It assumes that knowledge is produced through critically reflective social process; that linking learning to people's life experiences and conceptualising it as biography enhances learning and knowledge; and that these approaches represent a new experience of knowledge and learning to learners.

According to the theory, there are several inseparable and interdependent elements to a curriculum that provide the learning conditions needed to help students to become effective students by learning to relate to knowledge and learning as 'intellectuals' or by developing 'intellectual' ways of knowing. These contrast with the factual knowledge goals characteristic of many schools with which many students are familiar and comfortable and in terms of which they have learned to excel. Academic, personal and intellectual growth are mutually sustaining and work together to promote free thought in students. They all depend on effective content material chosen for its accessibility, relevance and the interesting questions it raises for students in terms of their practical knowledge and life experiences. It is therefore interdisciplinary in nature, with links to relevant theoretical, discipline-based knowledge.

For students to perform well academically they need to develop a critical relation to knowledge and learning. To do so they need a learner-centred environment characterised by democratic teaching styles. This learning experience helps them feel 'safe' enough to take risks in the process of developing opinions, thereby making personal sense of new knowledge. It therefore promotes deep understanding of theoretical concepts and capacities to relate them to other knowledge both theoretical and practical. The learner-centredness needed for developing this 'intellectual' way of knowing relies on the curriculum promoting the notion of learning as biography, related to students' emotional and spiritual development.

In this environment, 'safe' enough to promote experimentation, the content also provides a disjunction in the learners' experience in order to provoke critical reflection on practical knowledge, beliefs and values. This helps
learners to not only understand new theoretical knowledge, but also to develop opinions about it. In the process of co-operative, interactive meaning making, multiple perspectives are encouraged, individuality is respected and consensus is unnecessary. Both content and process thus promote some healthy scepticism towards accepted, powerful knowledge, validate personal knowledge and experiences and enable learners to recognise and make explicit the value of dominated knowledge and the relation between power and knowledge. They thereby enable learners to develop a deep sense of self-identity and personal self-worth. Personal empowerment is further enhanced by ‘academic’ performance that reflects deep understandings developed through elaborating knowledge.

At the same time, opportunities to develop and practise assertive, self-confident behaviour associated with self-worth or self-belief in ‘safe’ conditions enable learners to be critically reflexive. Hence the relationship between a learner-centred environment and the capacity to critically examine assumptions underpinning different forms of knowledge, values and beliefs, enabling learners to adopt a position in relation to new knowledge, making personal meaning of it. Deep understandings developed through knowledge elaborating processes thus depend on both intellectual and personal empowerment.

There is also a relationship between intellectually and personally empowered learners and academic empowerment. Related metacognitive capacities enable learners to reflect critically on their learning approaches and academic skills and competencies, identify strengths and weaknesses in them and adjust or develop them accordingly.

This theory, supported by data and now testable in our new context, thus argues for the interdependence of academic, personal and intellectual growth in promoting free thought in learners.
Faculty Structures and Leadership Styles

The second recommendation suggests that the Dean and the University consider instituting new structures in the faculty, with new policies on staff development, including leadership, and proposes that these might be considered for contexts beyond our faculty. Deans' roles are specifically discussed below.

Universities need to find ways of institutionalising the kind of 'learning' leadership that was found to be effective and re-think their faculty accountability structures to support this approach. This recommendation resonates with learning organisational theory, but further research is needed to test it and the recommendation must therefore be tentative. It is based on the conclusion that a 'learning' leadership style, with relatively flat accountability structures, enhanced both the teaching and learning experience and our capacity to change rapidly, while the less direct reporting structures in the faculty made it difficult to engage academics broadly in fundamental change.

In order to promote creativity, faculties should limit reporting structures to three layers, with staff reporting through course co-ordinators to Deans. These structures should not only lessen the burden of bureaucracy, but also promote a new sense of accountability towards the vision driving a faculty or university. These 'learning middle leaders' (like 'middle management' in corporations) might play an integral role in implementing change and generating creativity and accountability to a shared vision. They would have numerous opportunities to interact with the main body of academics and thereby to generate a 'learning' culture and ethos throughout the University. Furthermore they could ensure both accountability and interactive deliberation through applying 'learning' leadership approaches to internal quality assurance procedures.
At the same time the Dean could perform the same role with these ‘middle leaders’. Judging by the low attendance of meetings called by the Executive, to discuss proposed change initiatives, in the early 1990s, of our faculty’s course co-ordinators, this level of leadership lacked interest in transformation plans and did not feel obliged to participate in such discussion forums. This lack of commitment to change at ‘middle-leader’ level might well have been a major factor that hampered the Dean’s capacity to implement broader and more fundamental, creative change.

Faculty structures should also encourage small groups of academics to take joint responsibility for courses, to allow the kind of collaborative teamwork and creativity we found to be effective in developing our course. In the case of transdisciplinary course development projects, drawing on the findings of page 374, appropriate administrative support and reporting structures should be agreed and established to ensure sustainability. At the same time, faculties should grant sufficient resources, administrative support and freedom to enable small groups of education specialists and other ‘enthusiasts’ to explore new possibilities for teaching and learning, in response to the changing needs of students and other stakeholders. They should be able to interact with course co-ordinators and teams to share their knowledge, experiences and suggestions for innovation.

**Deans’ roles**

Acknowledging that the case study might only have been possible because of the vision and leadership of a unique Dean, this recommendation assumes that Deans are in their positions for both their vision and academic standing. Their roles bear some re-consideration and ways should be found to ensure that first, Deans are appointed against criteria that include vision and leadership capacities; and second, their talents are not sacrificed to administrative, bureaucratic procedures. If universities are to provide effective, relevant learning opportunities to their students in the rapidly changing context of the 21st century, Deans should have inclination and time
to focus on academic development within their faculties so that universities can benefit optimally from their academic strength and experience.

Ways should therefore be found for enabling Deans to apply their vision and leadership to areas of proven talent and demonstrated interest and to apply academic ‘learning leadership’ principles in their relationship with course coordinators. Strong managers should be put into place, for example, to support Deans, by taking responsibility for the smooth running of administrative processes. Freeing Deans from some of these duties would enable universities to benefit from the Deans' wealth of academic experience, vision and leadership. Empowered in this way, and given appropriate structures, Deans could cross-pollinate amongst one another and amongst their faculty course teams, the ideas and experiences emerging in their faculty to enhance teaching, learning and practitioner-research across the institution. They could also thereby promote a culture of interactive, critically reflective deliberation.

Staff, Curriculum and Student Development

The third set of recommendations concern policies that might promote, within the above enabling structures, the development of staff, curricula and students that might enhance leadership and curriculum practices, specifically course development processes and are considered in three separate subsections.

Staff development

First, leaders and ‘middle leaders’ should have opportunities to develop skills in leadership, to avoid, for instance, the kind of course management problems raised on page 210. In terms of leadership needed within the proposed new faculty structures, leaders should be obliged to participate in leadership development forums and adopt leadership styles compatible with the University or faculty vision. They should ensure those responsible for staff
selection, develop the skills that ensure appointees will enhance possibilities of achieving their vision. Thus effective leadership should reflect individuals' experience, insights and talents, within a framework of leadership policy. Universities and faculties should not then depend only on individuals' talents for effective leadership, but institutionalise it through leadership policy.

At the same time leaders should have opportunities to develop knowledge and skills useful in identifying candidates with not only proficiency in their discipline, but also a real interest, and proven proficiency in teaching and course development and a capacity for teamwork. Universities should not rely on the insights or preferences of individuals for selecting effective staff, but ensure academics in leadership positions are provided with appropriate development opportunities. However, there should be a sensible balance between this focus and the second, below, that takes cognisance of the reality that universities, and specifically our Faculty of Management Studies, have experienced difficulties in finding sufficient numbers of accomplished academics to meet increasing student numbers. (This is often attributed to academic salaries that cannot compete with those in the private sector).

Second, the following policy might be used to promote staff development, possibly through a Centre of Academic Development, or of Teaching and Learning. It might help address the kind of problems experienced in engaging academics intellectually about their curricula, as discussed on page 375, and more specifically, our experience with some accounting mainstream lecturers as discussed on page 343. (This involved difficulties in adopting approaches to teaching that were different from how they themselves were taught as students, and the better grades produced once they began to introduce experiential learning principles). The University recognised (University of Natal, 1994) that staff need not only the commitment to change but also to learn about the different demands and to develop skills to meet them, as raised on page 376. Relevant workshops were voluntary, however, and therefore attended mainly by frontier enthusiasts. This experience indicates the need to find a means of raising staff's consciousness about curriculum and specifically the kind of learning conditions that can affect outcomes.
Academic staff, including leaders, should be required to develop their knowledge of education principles, particularly in relation to teaching and course development, through staff development courses. This is especially important in contexts like ours where academic staff's professional development is restricted to their disciplines, and perhaps to teaching at secondary level. Staff should understand enough educational theory to be able to discuss their practices and defend their choice of teaching method theoretically. They should also have opportunities to explore the strengths and limitations of teacher-centred, content-focused approaches within their disciplines and contexts and within a broader theoretical framework. Most particularly there should be opportunities for academics to see the value of experience-based learning and to find ways of incorporating it into their teaching as and where it could be used to enhance learning. These processes could possibly be linked to internal quality assurance processes.

All academics, including those who might be 'enthusiasts', would benefit from the above opportunities to reflect critically on their teaching practices and how best to implement their plans. This is borne out in the problems we experienced in implementing our course plans, discussed on page 204, our need for more theoretical curriculum knowledge discussed in Chapter Eight, the facilitator's expressed need for further knowledge on page 217. Our practice could indeed have been improved by further developing effective teaching techniques, including skills in facilitating small group, collaborative learning, student assessment, empowering shy students to participate more actively and negotiating the curriculum with students; and developing reading, writing, communication skills, as raised on pages 191 to 220.

If learning is to be enhanced and educational 'standards' thereby promoted, academics should be rewarded for good teaching and learning practices, practitioner-research and other forms of learning. Development opportunities should, moreover, include space for debate and deliberation on the University's vision and opportunities to promote a critical community of academics, particularly amongst 'middle learning leaders'. There should also
be time, space and opportunity for academics to develop and defend theoretical frameworks for their curricula and thereby to become critically reflective of their teaching practices. If the University is to promote thoughtful, iterative course development by subject specialist academics, resources should be prioritised for developing such appropriate, supportive ‘learning’ structures and providing effective learning experiences for them. There should also be an expectation that staff engage intellectually in these learning opportunities. Accountability to the above staff (and leader) development processes would therefore be integral to faculties’ and universities’ effectiveness as learning institutions. Hence, the above structures, offering possibilities for promoting such accountability, would enhance their capacity to provide learning conditions appropriate to a rapidly changing context.

Third, universities should encourage practitioner-research at all levels, but particularly at a doctoral level to promote intensive, critically reflective work on how disciplines can best be taught or researched. This kind of research should be used to invoke debate amongst colleagues in relation to their practices and to inform practitioners in the broad academic community. Based on the above conclusions, moreover, and despite the literature claims that case study research is difficult to generalise, universities should reconsider the value of such research. It should not necessarily be discounted as irrelevant to other contexts, and universities should contemplate new ways of thinking about the nature of research.

Curriculum development

Based on the conclusion that experiential learning is effective for Management Studies students, it is suggested that this method should be integrated in appropriate ways into curricula, especially within Management Studies.

Course development projects should, furthermore, apply the above lessons about the benefit of practitioner-research, as far as possible, in order to
promote fuller understandings of practices and to inform their development. Academics should preferably be encouraged and enabled, also, to work collaboratively in critically reflective, democratic teams in course development initiatives, pointing to an area for future theoretical research. This would enhance creative responses to the problems or limitations they face. In addition, these teams should be multi-cultural in nature because of the benefits the multiple perspectives can generate, particularly in contexts of multi-cultural students. Based on the findings on page 374, however, that traditional university structures and practices were inadequate in supporting transdisciplinary curriculum innovation, appropriate measures should be taken from the start, in those cases, to ensure their sustainability. These should include ample administrative support, financial backing, clear, direct accountability and reporting structures.

Team leaders should ensure, in any case, that the team avoids the kind of confusions and misunderstandings we experienced. These related to different assumptions underpinning the terms we used and expectations we held of the course and of one another, discussed above and on pages 204, 206 and 212, demonstrating the practical, collaborative approach lacked a theoretical grounding. From the start of the project, the team should reach shared understandings about what they expect from one another, and what team-members' responsibilities are. At the same time they should agree on what the team understands precisely by terms key to the course planned, and where they would impose boundaries, for instance, on the notion of a 'democratic' course in relation to their aims and the course realities.

The above conclusions drawn from the experience with the case study team and with Skinner's (2002a; 2002b) experience of working with Accounting lecturers to improve their 'extension tutorials', indicate first, that teams should comprise more than one discipline specialist. Second, course development teams should incorporate multi-cultural perspectives and include academics from outside the discipline of the course being developed. To limit potential problems of 'power-relations' the 'outsider' academics should be respected, trusted curriculum specialists who demonstrate a commitment to enhancing
learning and are perceived as 'unthreatening' to discipline specialists. In this way they should work to help subject specialist lecturers apply effective teaching and learning principles to their curricula.

Assessment methods should, moreover, be considered integral to the curriculum, as an important learning opportunity, coherent with the approach to teaching and learning. This draws on our experience with accounting curricula that lacked this kind of coherence. The assessment methods did not reinforce experiential teaching and learning principles adopted in class, and dictated the students' more conservative approaches to learning, as discussed on page 345. Lecturers should thus test for the kind of skills, knowledge and relation to knowledge that the course seeks to promote. Few students will take seriously the aim to promote critical reflexivity, and adopt a suitable approach to this kind of learning and knowledge, if the assessment tasks require no argument and are clearly testing that certain knowledge was 'received'. Students will, moreover, become frustrated by the mixed messages if assessment tasks do not reflect the curriculum and question its integrity.

**Student development**

Based on the ongoing experience of mainstream lecturers commenting on how they enjoy teaching our students and appreciate the quality of their input, as discussed on page 247, students should be given opportunities, wherever possible to develop 'intellectual' ways of knowing and relating to knowledge. While learner-centred, experiential approaches to teaching and learning are recommended for this purpose, our experience warns, however, of the need to find an effective balance between authority and democracy and to limit students misuse of their democratic power. These points were raised on pages 206, 209 and 339. Students should be given opportunities to recognise that democratic rights are closely associated with responsibility to the academic community, including their peers.
Aside from the academic development students should experience through appropriate curricula, those with leadership interest and potential should be offered development opportunities that empower them to support academic initiatives and to work interactively and democratically with staff. This is based on the conclusion that a flat reporting structure and 'learning' leadership style, enabled students to grow as leaders and that talented senior students, undergraduate and postgraduate, might augment the learning opportunities offered in a curriculum. Moreover in a context where human and financial constraints affect the quality of the curriculum experience, talented senior students offer a useful resource. At the same time this approach would harness and strengthen our Africanness by assuming an 'other-centredness' or 'ubuntu' in our learners and promoting its richness.

Senior students should, thus, be offered development opportunities to enable them to assume effective, responsible leadership amongst students, to interact democratically with staff and to thereby enhance the teaching and learning environment. These experiences might enable students to develop knowledge and skills in, for instance, group facilitation and communication which would enhance their own development and experience and therefore their employability. This would provide an incentive to students to contribute to the learning environment in this way, if they were not driven by a sense of community consciousness.

**The Limitations and Strengths of this Work**

In order to explore the validity of the above conclusions and recommendations, I have reflected on the limitations and strengths of the research and the thesis itself, in relation to the situation under which the research was undertaken.
Research Limitations

The case study research had some limitations that I could have avoided, had I already been through the learning spirals at the start. I would particularly have planned the case study and conceptualised our curriculum differently.

First, the research lacked proper planning, preparation and organisation, a particular shortcoming in view of the unique situation and the rapid change in which we were working, as demonstrated, for instance, on page 154. This observation is pointless, however, in terms of the time frame in which we worked and the reality that one cannot plan research properly in situations of rapid change, because there is very little time to do it. The context reflected the urgency of the historical moment in South African history, the speed with which the Dean required us to develop the course, his insistence that we ‘learn-by-doing’ in order to save time, and our undertaking the project alongside our normal functions. It meant there was only time for relatively superficial consultation of the relevant bodies of literature during the course planning and initial implementation phase.

My approach to data gathering was thus unsystematic and more enthusiastic than well considered. Lacking a pilot research project to guide me, unsure of the quantity of data needed to answer my questions and the quality of evidence each data gathering procedure would produce, I applied multiple methods and probably gathered too much data for the level of evidence it could produce.

Second, and related to the above problem, this work was not initially conceived as doctoral research, and the case study did not produce data that could accommodate an appropriate level of analysis for this purpose. The decision to upgrade the research to a doctoral study was related to the questions I was asking during the post-case study, reflective phase, illustrating my own academic journey. Thus the work grew unsystematically, without proper planning and preparation.
Third, and also related to lack of time for planning and preparation, the project began without a full theoretical understanding in terms of the research literature. This meant there was some reliance on practical knowledge in the course evaluation task assigned to me by the team. The literature on qualitative and, specifically, case study research was explored retrospectively, while grappling with the case study data. There were, therefore, problems of inadequate preparation; questions about wider applicability of the case study to other contexts and about memory, in terms of an experience from three years earlier. Formal writing up of the case study began only once the 1997 students started graduating, and all the quantitative data had been gathered, hence the time lag, but the detailed course meeting notes that had been kept for reference alleviated this problem. At the same time ongoing research and observations on our practice indicated strongly that the course continued to be effective in our changing circumstances, and therefore might well have some wider applicability.

Fourth and similarly, a fuller understanding of the curriculum literature was developed only once the course had been implemented for the first time. From the team’s practical knowledge of PBL we had considered it a progressive methodology, relatively well understood by staff, students and sponsors related to Management Studies disciplines. We used that terminology during the course development process, while in practice, meaning something more by the term, than what was reflected in the PBL literature. We thereby imposed a wider curriculum framework on our practice and it was only during the reflective phase of this research that the PBL literature was found to have limited value for this work, since it was almost exclusively bounded by the purpose of educating for the professions. It then became clear that the practice would have benefited from being conceptualised more broadly as experiential learning.

Similarly, the work should have explored further, the well-established literature on adult learning that saw the need to give people the freedom to learn in order to achieve better outcomes. In the same way the literature on
collaborative work and learning organisational theory would have grounded
our team approach theoretically and thus informed our practice.

At the same time, the practical recognition that experience-based curricula
could accommodate African interests and culture might have been pursued
and the relationship between experiential learning and African cultural
concepts like 'ubuntu', 'indaba' and 'consensus' could have been explored
theoretically. The work would have thus been enriched. It has, however,
pointed to this as an area for future research.

Fifth, an important limitation to this work is that it still has not answered the
research questions conclusively, based as they were on the case study
experience. As the course has entered its next phase of development in 2003
there is no absolute clarity, for instance, that our aims can be achieved
through experiential learning in the context of a larger, multi-cultural student
group. Most of these students come from outside our programme and
therefore their experience lacks learner-centred elements that augmented our
students' learning environment in the past, for instance. At the same time we
have depended on three new tutors from outside the programme, and they
may not be similarly immersed in the course's underpinning philosophy.
There is no clear answer on what it was in the whole learning experience that
made it 'work', which elements were more or less essential in helping
students learn to be students, where compromise would have serious
implications on learning and what these implications would be. While this new
phase demonstrates, moreover, that the faculty was indeed able to change its
degree structure to accommodate fundamental curriculum reform, there are
still questions about its capacity, and that of the University as a whole and
universities in general, to integrate non-traditional approaches within their
courses. There are, nevertheless, hypotheses that have been made.

Finally, there were more issues that arose through the work than the study
could deal with, and this study could focus on only a significant few, including
a brief consideration of some unintended lessons. In addition, the reflections
drew on our practical experience and relevant literature but did not reflect an
exhaustive investigation into either the literature or the experiences. Time did not allow for this in the context of my accruing responsibilities, particularly in the light of developing the course for ‘mainstream’ students and the forthcoming merging of our institution with another. This has impacted also on the thesis itself, as discussed below.

Research Strengths

The work, nevertheless, has some important strengths. These enabled the course to be launched and assessed, producing some hypotheses with statistically significant quantitative and rich qualitative findings. These conclusions have, in fact, been used effectively to inform subsequent course developments and reflections on some wider questions. The work’s strengths thus include first, the time spent reflecting on the 1997 practice and the continued learning that took place; second, the course’s effective application over five subsequent years; third, a sound curriculum approach; fourth the strong course team and the intensive data gathering and analysis processes. These strengths indicate that the above conclusions and recommendations are valid for the situation in which the research took place.

First, the reflective, post case study phase has meant that my academic journey has continued and the real developmental process has not stopped. My research journey as a practitioner researcher was, thus, a real, ongoing, iterative developmental process. It provided, moreover, the opportunity to problematise the case study findings and to pose further questions during the reflective phase. The case study, therefore, became the research problem for me as a researcher, forcing me to step back from the practice and to separate my roles as course developer and researcher.

This post case study research phase likewise enabled me to extend the principal research question so that I could answer it at a more theoretical level. This involved my attempt to answer questions about experience-based learning in relation to PBL and the curriculum studied; the case study findings’
replicability elsewhere, given the nature of universities; possibilities for the wider applicability of the case study. This phase thereby added value to the research and lifted it to a doctoral level, promoting reflection on the initial case study conclusions, enriching the work with a wider literature base and data and experience from having implemented the course five more times. All of these questions thus contributed to the hypothesis that the conditions under which learning occurs can affect the outcome.

Subsequent developments to the practice were not rigorously researched, however, in terms of the elements that changed and shortcomings resolved (which would have been a different thesis). They did, nevertheless, usefully strengthen and expand the study's points of reference. The concurrent, iterative course development process and data gathering thus helped me to reach a fuller understanding of the practice or something close to the 'truth'. While this has created a time-lapse between implementation and finally writing up the experience and reflections on it, the value added to the study over this time outweighs the limitation. It meant the reflections were not made in isolation but in the context of building on the case study through ongoing involvement in the practice and grappling with developments that reflected ongoing assessment and contextual changes.

There have, thus, been opportunities to reflect back on initial conclusions in the light of new developments and ongoing statistically significant analyses of comparative student performance, new questions emerging through this second spiral and a broader literature base. Moreover, this reflective phase has augmented our experience of a rapidly changing programme and course, providing a basis for exploring universities' capacity to apply learning organisation principles, to change and therefore to accommodate non-traditional curricula.

Second, and related to the above, the fact that the course worked over the subsequent five years, when its essential elements were replicated in a changing context, strengthened the case study conclusions. The data gathered over this time thus indicated that the work might have wider
relevance in the context of our changing programme. This enabled me to
develop the hypothesis that a single case study might well have wider
applicability.

Third, the teaching and learning method was sound, as shown through the
case study, subsequent iterative course development processes and
reflections on experiential learning in Chapter Eight. The reflective phase
represented a continual grappling with questions of how to help students
develop an intellectual relation to knowledge and learning in a changing
context. It thereby enabled me to reach something close to understanding the
potential of experiential learning for achieving our course purposes. Indeed,
conclusions drawn from our practice accorded with much of the literature on
experiential learning and indicated the limitations of PBL, as applied by
educators for professions, for an emancipatory purpose and for
accommodating non-'Western' approaches and interests. The curriculum
conclusions and recommendations were therefore clear and this enhanced
the work's validity.

Underlying the above strengths, moreover, was a coherent critically reflective
theoretical framework, linking theory to practice, that enhanced the case
study's integrity. It informed the approach to course and programme
development and its evaluation as well as curriculum, teaching and learning.
The conception of learning as biography accorded also with the way this work
was conceived as an academic journey. The coherence has, thus, helped
clarify the relations between my learning as a practitioner-researcher, the
course-team's learning, students' learning and the University's learning.

Fourth, the quality of input by the critically reflective course team strengthened
the case study and therefore the conclusions and recommendations that drew
on it. Enriching to this work was the team's shared vision and passion for
what we wanted to achieve for our students, the common radical constructivist
philosophy and our collective view of students, relating to them as co-learners
in the course development process. Similarly, enhancing the work was the
subsequent critical reading of the remaining team-member over five years,
and our interaction as we critiqued our practice in relation to our doctoral studies.

Fifth, the multiple data-gathering procedures and data gatherers, subsequent data analysis, with cross checking for interpretation, careful documentation and organisation were intensive and thorough, strengthening the qualitative data. While there was probably too much assessment, it provided opportunities for checking data arising from various stages in the learners' experience, from different data gatherers and diverse forums. Similar data emerging from these different sources gave some assurance that the rich picture portrayed something close to the 'truth' and some confidence that I was close to understanding the situation. The documentation, furthermore, provided an important reference during the reflective phase and final writing process, substantially reducing my reliance on memory, and, thereby, further enhancing the validity of my conclusions and recommendations.

The above strengths of this study and their capacity to counter and outweigh its limitations thus suggest that the conclusions and recommendations are valid for the situation in which the research occurred. There are indications also that they might well be applied to different contexts just as there are also questions that remain as possible future research focuses.

**Thesis Limitations and Strengths**

The thesis represents emergent research and my initial lack of confidence in the early stages of my journey as a researcher. Reflected in the thesis is some tentativeness demonstrated through my early writing style, particularly in relation to the retrospective nature of the literature survey. This late interrogation of case study research and curriculum literature, particularly on PBL, left me feeling reliant on it in interpreting our own experience, as I worked to grasp current thought and sought to legitimate our practice.
Furthermore, the thesis structure reflects the emergent research with its second spiral of research questions. It could have been better structured had the case study been undertaken from the beginning as the first part of the work to answer the main research question, rather than as a Masters dissertation that grew from a course evaluation project. Compounding the situation were my ongoing professional responsibilities in a context of rapid change that meant both my Dean and I were impatient for me to complete this work, and focus fully on the new challenges of 2003 and 2004. Thus there was a sense of rush that affected negatively the writing style and hence the clarity of the thesis which would have been improved by severe editing. The sense of haste also meant I failed to draw out the theoretical relationship between experience-based learning and African cultural concepts once it became clear that we were using this approach to accommodate African experience, in practice, and that PBL was inadequate for this purpose.

Notwithstanding, the thesis does present logical, convincing arguments, based on sound research and they reflect very closely the practice from which the questions emerged.

**Future Research**

This work represents ongoing spirals of questioning and learning in my quest to answer the main research question. In Part Three I addressed three questions that emerged from problematising the case study. This has left me, however, with another spiral of questions that have arisen as a result of these explorations and which points to several areas for further research.

First, there are questions that have arisen from the argument that experience-based learning provided a more fitting theoretical framework for the curriculum studied, than PBL. One question that needs to be addressed is about the problems of using ‘Western’ literature, with its individualist, instrumentalist underpinnings, in a non-‘Western’ context.
Related to the above is a question about the theoretical relationship between experiential learning and African cultural concepts such as 'ubuntu' and consensus. While the learning conditions accommodated African approaches and understandings, based on practical knowledge, and the concept of 'ubuntu' was, in fact, embedded in the curriculum, their relationship to the educational approach was not pursued at a conceptual level. It later became evident that the experience-based approach stood at the interface between two distinct cultures – 'Western' and African – for students straddling both. This needs to be explored fully in theoretical terms in order to investigate how African cultural concepts like 'ubuntu' function. Work of this nature could probably inform most 'Western'-orientated research, which does not accommodate this kind of thinking. It would therefore be a significant step to initiate research in which this interface is explored both practically and conceptually, as I intend to do.

Second, on a more practical level, I plan to continue this research to investigate if the approach is effective under new conditions and therefore if the 'whole student learning' represented in the curriculum theory on page 407, can be implemented in the course's new context. This will involve assessing the effect of our learner-centred, experiential learning approach on students on the 2003 course piloted for 100 students. There will follow questions about its applicability to the 2004 course for a multi-cultural class of over 600 first-year students and, thereafter, its adaptability to the new context of integrating experiential learning principles within three subsequent Economics modules, for over 1000 students. (This will include those from other faculties, with a wider range of academic ability). I would thus seek to answer questions about this study's applicability to other Management Studies contexts.

A related research area is its wider applicability to other disciplines, particularly in the hard sciences with their assumptions about 'factual' knowledge and their traditional focus on content-based learning. There are questions to be asked, furthermore, about the implications of implementing experiential learning principles throughout all courses studied within a degree,
as there are questions about an effective curriculum for the Alternative Access Programme mentioned on page 87.

Third, and in relation to the observation, on page 328, that further research on the graduates' life stories was needed I would like to explore the impact of the course on students' lives beyond the classroom, within their communities and later in their business environments. This would involve an interrogation of the extent to which students transferred criticality, with the associated self-confidence, into these contexts. A particular interest would be the extent to which they acted as 'change agents', demonstrating a consciousness of social transformation issues in their business and/or community decisions and how this impacted on career progress. This recalls observations about the potential conflict between our curriculum and the expectations of business, raised on pages 34 and 315. Related to this are questions about the role of 'ubuntu' in a changing society, recalling observations about community consciousness and 'ubuntu' raised on pages 35, 94 and 326.

Fourth, further research is needed to establish the relation between universities' capacity to change, leadership styles and staff's reporting structures, to test the recommendations made on page 410. Questions about our capacity to collaborate effectively with Economics staff in introducing experiential learning principles into a traditional, fairly conservative curriculum with large numbers of students will be of immediate interest. This could raise issues of power amongst team-members in terms of introducing a new educational discourse into a course with its own disciplinary discourse. This will also raise new questions about working with level 2 curricula.

Fifth, there is another area for future research related to the recommendations for staff and curriculum development and questions about replicating elsewhere the kind of conditions under which I have argued learning might occur. It could involve investigating the effect of interventions like staff workshops in terms of new approaches to teaching and learning and perhaps include action research by practitioners from specific departments.
Related to this is a sixth, more general question about universities' capacity to respond rapidly to change and specifically about what processes could be used to help large-scale transformation processes occur. It would be useful to test the above recommendations, on page 410, on how universities might cope better with rapid change through new faculty structures and leadership styles, and staff, curriculum and student development programmes. Would they, in fact, enable universities to better become 'learning' institutions? Such research might explore the application of learning organisational theory and other possible approaches in addressing the problems universities experience in implementing change. Research might address questions about the role of a 'critical community' in enabling meaningful change, and how it might be nurtured in response to the discussion on page 372, about the way universities' structures and cultures hinder change.

These questions are particularly pertinent in our 2003 context when the next transformation phase of merging our University with a neighbouring historically 'black' university has begun. Government's aim is to provide one 'Africanised' institution (Makgoba, 2002b) to serve all communities in the region, and therefore to provide appropriate learning opportunities for all.\footnote{Our University has very high entrance criteria relative to the merging partner. Thus curricula in the new institution will need to cater for a wider range of preparedness and ability.}

**Future Vision**

Having reflected on this work and the directions it suggests for future research it remains for us to consider the forthcoming spiral of learning that now confronts me as I share my vision for the university as it enters the next transformation phase. The new merged institution will overcome the historic, inequitable divide between previously 'black' and 'white' institutions to incorporate a new culture and structure. Academics and students will be committed to the new shared vision to “create a strong, academically excellent and socially sensitive and responsive university” (University of Natal,
2002:1) able to meet the needs of the region, country and broader southern African region through effective, innovative learning opportunities.

To this end the University's leadership will provide a vision owned by staff and students from the two universities set to merge into a new, truly African institution, internationally respected for its capacity to produce knowledgeable, critically aware, independent thinkers. Leadership will provide institutional and faculty structures and leadership styles that enable staff to engage intellectually and interactively with the new vision and will support and reward creative teamwork in effective learner-centred curriculum development projects. This will also promote staff and student development with a view to enhancing learning opportunities for both students and staff and to develop a critical community and learner-centred environment.

Curricula will reflect the effective integration of experiential learning principles and contextualised knowledge wherever these will promote independent thought and 'intellectual' ways of knowing. They will thus enable students from diverse backgrounds to become competent, critically reflective, ethical and socially responsible, grounded in African culture and knowledge in order to contribute optimally to global knowledge (Makgoba, 2002b). In this vision we will succeed, moreover, in implementing a learner-centred curriculum for large numbers of students and our faculty will be recognised for its capacity to produce graduates who are competent, critically aware and creative, independent thinkers and problem-solvers and who are highly employable both locally and globally. They will develop innovative responses to local and global challenges besetting business and society that demonstrate the richness and value of their learning experience and their African identity.
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MISSION STATEMENT

The University of Natal strives to serve all sections of its community through excellence in scholarship, teaching, learning, research and development.

- It rejects apartheid and, as a non-racial university, its community consists of all people in all social circumstances, developed and developing, urban and rural.

- It seeks to honour its commitment to being an Equal Opportunities/Affirmative Action university and promote, internally and externally, the achievement of a free, just and equitable order, rejecting any form of discrimination based on race, colour, creed, religious conviction, nationality, gender, marital status or sexual orientation.

- It seeks to achieve the highest level of scholarship through academic integrity, pursuit of knowledge, creative endeavour and application of these to the benefit of its entire community.

- It seeks to achieve excellence in teaching by recruiting the best staff, rewarding excellence in teaching and establishing vigorous programmes of staff development.

- It seeks to achieve excellence in learning by admitting students of high academic potential providing conditions that will enable them to realise their academic potential and offering good courses and curricula leading to reputable qualifications.

- It seeks to achieve excellence in research by recruiting the best staff, encouraging and rewarding the research endeavour and providing the best possible facilities.

- It seeks to achieve excellence in programmes of development by mounting appropriate curricula and undertaking research leading to the advancement of the community in all its diversity.

- It seeks to maintain the highest standards in all its teaching/learning and research/development programmes, whether they be pure, applied or developmental in objective.

- It seeks to protect for itself and other universities the highest levels of University Autonomy and Academic Freedom.

- It seeks to grow so that it satisfies both national and community needs for high quality academic and professional tertiary education.

- It seeks to mount efficient and effective services in support of its academic objective.

- It is committed to the preservation and conservation of the environment and natural resources of the region.

(University of Natal, 1989:20)
STUDENT RECRUITMENT AND SELECTION PROCESS
ECONOMICS AND MANAGEMENT EXTENDED CURRICULUM (EMEC)
PROGRAMME

AIM
To identify B. Com candidates with the potential to excel academically, given effective learning opportunities, and to provide EMEC sponsors with appropriate interviewees by the end of 1997.

SELECTION CRITERIA
The success of our students is attributed to their extended curriculum as well as the student selection process. Both of the above are products of ongoing critical self-evaluation and development. The aim is to assess applicants as holistically as possible, taking the following into account:

- school reports and assessments (academic and social)
- Maths, English and Accounting or Science marks from school
- overall performance in all subjects
- EMEC maths test
- intelligence
- career choice, interest in career
- educational and sports achievements
- extra-curricular/community activities and interests
- opportunities offered by the school
- opportunities offered by the home
- response to challenges, circumstances
- attitude to education, educational opportunities and to life in general
- approaches to learning
- leadership qualities
- interaction with peers (academic and social)
- interaction with EMEC staff
- communication and interview skills
Appendix 3

Distribution of Level 1 examination grades, June 2002, comparing achievement of 'our' students from relatively 'advantaged' and 'disadvantaged' schools and 'other' students mainly from 'advantaged' schools

<table>
<thead>
<tr>
<th>No. of Students</th>
<th>No. of Exams Written</th>
<th>% Pass Rate</th>
</tr>
</thead>
<tbody>
<tr>
<td>13</td>
<td>62</td>
<td>99</td>
</tr>
<tr>
<td>21</td>
<td>105</td>
<td>92</td>
</tr>
<tr>
<td>1073</td>
<td>5365</td>
<td>78</td>
</tr>
</tbody>
</table>

- □ Our' Students from 'advantaged' schools
- ■ 'Our' Students from 'disadvantaged' schools
- □ 'Other' Students

<table>
<thead>
<tr>
<th>Categories of Results</th>
<th>1st Class</th>
<th>2nd Class</th>
<th>3rd Class</th>
<th>Fail</th>
</tr>
</thead>
<tbody>
<tr>
<td>1st Class =&gt;75%</td>
<td>25</td>
<td>31</td>
<td>20</td>
<td>161</td>
</tr>
<tr>
<td>2nd Class = 60-74.5%</td>
<td>30</td>
<td>30</td>
<td>16</td>
<td>86</td>
</tr>
<tr>
<td>3rd Class = 50-59%</td>
<td>35</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Fail = 0-49%</td>
<td></td>
<td></td>
<td></td>
<td>9</td>
</tr>
</tbody>
</table>

1st Class => 75%  2nd Class = 60-74.5%  3rd Class = 50-59%  Fail = 0-49%
FITTING IBS INTO THE NQF?

What is the name of the module?
Integrated Business Studies (IBS)

What is the name of the programme of which this module will form a part?
B Com (Management) - 1999
B Com (Accountancy) - 2000

What is the purpose of the module?
To provide an interdisciplinary foundation course which integrates knowledge of the subjects students study in their first year of a B Com degree (Accounting 1, Economics 1, Business Information Systems 1, Commercial Law 1). The module will demonstrate:
(a) how these interrelate with each other
(b) how they apply in current real-world work situations
Through a teaching methodology of case studies the students will address real or simulated situations in the South African business world. This method is fairly common in teaching postgraduate commerce students (eg in the Harvard Business School) - IBS however introduces students, from the beginning of their university careers, to the real-life implications and complexities of the subjects they are learning theoretically. The case-studies also provide a vehicle for students to be involved in intensive group-work, gaining skills of negotiation, presentation, communication and problem-solving.

The course therefore specifically addresses the need expressed by employers in industry for graduates who are able to ground theory in current practice, who communicate well, have competence in problem solving, and are alert to current issues.

At what level will the course be registered?
Level 6 (First degree level)

What are the entry requirements?
Further Education Certificate (Matriculation)
More specific entry requirements will depend upon the decisions taken by the Faculty for the programme as a whole.

What position will the module hold within the wider programme?
The module will be an elective.
There are no pre-requisites and no co-requisites. However students taking the course may be restricted to first-years, or to those with a maximum number of 'x' credit points, to prevent students taking this beyond their second year as an 'easy option'.

Appendix 4
What will be its credit points as determined by SAQA?
This will be a standard one-semester module, i.e. it will carry 15 points - and involve 150 notional study hours.

What are the overarching or critical outcomes?
These conform very closely to those identified in the White Paper on Higher Education, SAQA, and the University of Natal's VCR in terms of social responsibility, 'open-ended intellectual inquiry', 'foundations of lifelong learning' and 'critical cross-field education and training outcomes'. Social responsibility issues are specifically dealt with in case studies which focus upon social and environmental problems. English language proficiency is cultivated through interactive small-group learning situations, oral presentations and written work. Appreciation for other points of view grows from arguing for a position and attempting to come to a consensus in the open-ended scenarios presented through the case studies. Skills of leadership, management, and problem-solving appropriate for entrepreneurship are initiated in small, and sometimes significant, ways through learning methods which require engagement with the whole picture in all its complexity. Coming to grips with ideas of accommodation and compromise requires that students face something of what it is like to bear responsibility - and presents them with ideas about how solutions chosen can impact upon real lives. The nature of the course is interdisciplinary, and integrally involved with cross-field situations requiring both practical and theoretical knowledge. Business themes typically deal with education and training issues in which the distinctions between these become blurred.

What are the specific learning outcomes?

(i) Knowledge
The module draws upon the content knowledge of each of the students' first-year courses. By placing these in context, problematising them and seeing their connections to each other and the real world, it seeks to enrich and deepen the understanding of course-specific content - and to bridge the gap between theory and practice. Some reference is also made to knowledge which the students will learn in later courses but no specified additional content is included in the course.

(ii) Skills
Skills of problem solving, communication, independent research, group-work, summarising and essay-writing.

(iii) Attitudes
We do not seek to inculcate specific attitudes in the students beyond what they are keen to develop for themselves. However the learning experiences provided by the course involve students in consideration of various social and environmental issues; they also entail the negotiation of group dynamics, and practice in problem-solving in situations in which no one solution is understood as correct, but various potentially viable solutions are considered and consensus is attempted. We believe that these experiences inevitably confront
students with ethical, social, political and management issues which will lead them to consider responses appropriate to themselves and to their chosen careers.

Assessment

Assessment methods
Students will be expected to keep individual portfolios of their work. Assessment will be incremental and continuous, and tasks will be set which demand a range of skills to be demonstrated within different assessment contexts involving: self-assessment; peer assessment; group assessment; presentations; a researched essay; formal and open-book tests.

Assessment criteria
Students will have to demonstrate an ability to express coherent and well-structured opinions both verbally and in writing showing a knowledge of their mainstream courses and a reasonable understanding of current business and political issues. They will have to demonstrate ability to research a topic using the resources of the library and any other appropriate informal research methods. They will also have to make a formal presentation of their work using overhead projection techniques and computer skills; and to indicate ability to work collaboratively and effectively with peers. Expected learning outcomes will be made clear to students at the beginning of the course, and particular assessment tasks explained and, where possible, negotiated with students.

An examination will be set only for those students who achieve between 40% and 49% in their continuous assessment.

Quality will be assured by a system of on-going internal moderation by lecturers in the faculty, and also by external examination of students' portfolios of work at the end of the module.

Jane Skinner
Janet Hesketh
1997
INTerview Questions - 8 April 1997

Name of interviewer:

Students in the group:

1. With the class boycott etc. at the beginning of the year, we lost time, and didn't fully discuss the nature and purpose of IBS and your expectations. Did this have any positive or negative result? Please explain.

2. To what extent has the IBS methodology/teaching style and the IBS content material influenced your experience at the university so far? (Please explain your answers below)
   - Academically - generally
   - Academically - specifically in other mainstream courses
3. Which IBS sessions worked well for you? Explain why.

4. What do you think of the methods of assessment for IBS, suggested in yesterday's handout?
5. Suggestions for improvement - any aspect of IBS?

6. Any problems / comments about the whole EMEC package ie EMEC courses eg stats, computers; mainstream courses, tuts, extension tuts.

7. Any problems / comments about the whole university experience including social life, being an EMEC student, having mentors etc
SECTION ONE : PROPOSED LEARNING OUTCOMES

The proposed learning outcomes of IBS were as follows:

By the end of the course, the students should:

1. have developed an understanding of the interdisciplinary nature of knowledge in the field of Business Studies.

2. be able to apply this interdisciplinary understanding in realistic business situations through case studies.

3. have developed appropriate academic skills, including research, academic reading and writing skills, critical and analytical thinking, and synthesising information and summarising.

4. have begun to develop skills and attitudes valued in the world of work, including self confidence, problem-solving, working collaboratively and co-operatively, leadership and presentation skills.

1.1 To what extent do you think these outcomes were achieved?

1.2 To what extent do you think the above outcomes are appropriate? Please explain your answer.
SECTION TWO: IBS' s ASSISTANCE WITH FACULTY MAINSTREAM COURSES

Please rate the following questions about the case study approach used in IBS, by ticking the appropriate boxes.

2. To what extent did your work on the cases help:

2.1 you understand the mainstream Economics course?
   1. not at all  2. not much  3. quite a lot  4. very much

2.2 you understand the mainstream Com Law course?
   1. not at all  2. not much  3. quite a lot  4. very much

2.3 you understand the mainstream Accounting course?
   1. not at all  2. not much  3. quite a lot  4. very much

2.4 show how economics, commercial law and accounting relate to one another in practice?
   1. Not at all  2. not much  3. quite a lot  4. very much

2.5 show how theoretical concepts in Economics relate to the real world?
   1. Not at all  2. not much  3. quite a lot  4. very much

2.6 show how theoretical concepts in Com Law relate to the real world?
   1. Not at all  2. not much  3. quite a lot  4. very much

2.7 show how theoretical concepts in Accounting relate to the real world?
   1. not at all  2. not much  3. quite a lot  4. very much

2.8 extend your understanding of concepts introduced in the Economics course?
   1. Not at all  2. not much  3. quite a lot  4. very much

2.9 extend your understanding of concepts introduced in the Com Law course?
   1. Not at all  2. not much  3. quite a lot  4. very much

2.10 extend your understanding of concepts introduced in the Accounting course?
    1. Not at all  2. not much  3. quite a lot  4. very much
SECTION 3: IBS' S ASSISTANCE WITH SKILLS, ATTITUDES AND APPROACHES

3.1 To what extent did IBS help develop:

3.1.1 the confidence to express your ideas within a small group?

<table>
<thead>
<tr>
<th>1. not at all</th>
<th>2. not much</th>
<th>3. quite a lot</th>
<th>4. very much</th>
</tr>
</thead>
</table>

3.1.2 the confidence to express your ideas in discussions involving the whole class?

<table>
<thead>
<tr>
<th>1. not at all</th>
<th>2. not much</th>
<th>3. quite a lot</th>
<th>4. very much</th>
</tr>
</thead>
</table>

3.1.3 the confidence to ask questions?

<table>
<thead>
<tr>
<th>1. not at all</th>
<th>2. not much</th>
<th>3. quite a lot</th>
<th>4. very much</th>
</tr>
</thead>
</table>

3.1.4 your ability to listen to and consider another viewpoint?

<table>
<thead>
<tr>
<th>1. Not at all</th>
<th>2. not much</th>
<th>3. quite a lot</th>
<th>4. very much</th>
</tr>
</thead>
</table>

3.1.5 your ability to work co-operatively and collaboratively with your peers?

<table>
<thead>
<tr>
<th>1. Not at all</th>
<th>2. not much</th>
<th>3. quite a lot</th>
<th>4. very much</th>
</tr>
</thead>
</table>

3.1.6 your ability to represent your group eg present the group's conclusions?

<table>
<thead>
<tr>
<th>1. Not at all</th>
<th>2. not much</th>
<th>3. quite a lot</th>
<th>4. very much</th>
</tr>
</thead>
</table>

3.1.7 your ability to think critically?

<table>
<thead>
<tr>
<th>1. Not at all</th>
<th>2. not much</th>
<th>3. quite a lot</th>
<th>4. very much</th>
</tr>
</thead>
</table>

3.1.8 your ability to synthesise information (ie combine elements to form a whole)

<table>
<thead>
<tr>
<th>1. Not at all</th>
<th>2. not much</th>
<th>3. quite a lot</th>
<th>4. very much</th>
</tr>
</thead>
</table>

3.1.9 your ability to summarise information?

<table>
<thead>
<tr>
<th>1. Not at all</th>
<th>2. not much</th>
<th>3. quite a lot</th>
<th>4. very much</th>
</tr>
</thead>
</table>

3.1.10 appropriate academic reading skills?

<table>
<thead>
<tr>
<th>1. Not at all</th>
<th>2. not much</th>
<th>3. quite a lot</th>
<th>4. very much</th>
</tr>
</thead>
</table>
3.1.11 your ability to structure your essays or reports?

1. Not at all  2. not much  3. quite a lot  4. very much

3.1.12 your ability to research a topic?

1. Not at all  2. not much  3. quite a lot  4. very much

3.1.13 your ability to analyse information?

1. Not at all  2. not much  3. quite a lot  4. very much

3.1.14 confidence in your academic abilities?

1. Not at all  2. not much  3. quite a lot  4. very much

3.2 To what extent did the IBS course help:

3.2.1 you take responsibility for your own learning?

1. not at all  2. not much  3. quite a lot  4. very much

3.2.2 Please explain your answer.

3.2.3 show there are different ways of looking at a problem?

1. not at all  2. not much  3. quite a lot  4. very much

3.2.4 show there are often no obvious 'right' answers to problems in the real world?

1. not at all  2. not much  3. quite a lot  4. very much

3.2.5 show you should defend your views with facts?

1. Not at all  2. not much  3. quite a lot  4. very much
3.3 To what extent were your classmates a resource to you in case studies?

1. not at all  2. not much  3. quite a lot  4. very much

3.3.1 Please explain.

3.4 To what extent do you feel the cases allowed you the freedom to draw your own conclusions?

1. not at all  2. not much  3. quite a lot  4. very much

3.4.1 To what extent was it important to you that you could draw your own conclusions?

1. not at all  2. not much  3. quite a lot  4. very much

3.4.2 Please give reasons for your answer.

3.5 To what extent was it frustrating to find there was no single 'right' solution to the problems?

1. not at all  2. not much  3. quite a lot  4. very much

3.5.1 To what extent did this positively affect your learning / understanding of concepts introduced in the case.

1. Not at all  2. not much  3. quite a lot  4. very much

3.5.2 Please explain your answer.
SECTION 4 : THE IBS TEST

4.1 To what extent was it a new experience to write an open-ended test like the IBS test?

1. Not at all  2. not much  3. quite a lot  4. very much

4.2 To what extent was it different from other tests you have written this year?

1. Not at all  2. not much  3. quite a lot  4. very much

4.3 To what extent did you find you were learning new things through the test?

1. Not at all  2. not much  3. quite a lot  4. very much

4.4 To what extent do you think the test enabled you to demonstrate your understanding, knowledge and academic skills?

1. Not at all  2. not much  3. quite a lot  4. very much

4.5 To what extent do you think the test will be a fair assessment of what you have learned in IBS?

1. Not at all  2. not much  3. quite a lot  4. very much

4.6 Would you recommend we assessed next year’s students with the same sort of test? Please explain your answer.
SECTION 5 : THE BUSINESS PROPOSAL

5.1 To what extent was the independent research which you did for the business proposal a positive learning experience?

1. Not at all  2. not much  3. quite a lot  4. very much

5.2 To what extent do you think that your work on the Business Proposal was a natural development from the case studies?

1. not at all  2. not much  3. quite a lot  4. very much

5.3 To what extent were your class mates a resource to you in research for the Business Proposal?

1. not at all  2. not much  3. quite a lot  4. very much

5.4 To what extent were your class mates a resource to you in preparing the presentation of the Business Proposal?

1. Not at all  2. not much  3. quite a lot  4. very much

5.5 Do you think we should have the Business Proposal exercise in IBS next year? Please explain your answer.

Thank you for your co-operation. If you think of any other issues we should have raised please add them here; or discuss them with us in person or through the e-mail. And good luck in your June exams.

Please keep in touch.

Janet
NAME (optional):

You have just completed the final IBS module “Getting into Gear or Driving with the Break on?” We would like to ask you some questions about this module, but we are also interested to know how you feel about the whole year’s IBS experience.

Please answer the following questions as fully as possible. Your answers will help EMEC staff to critically reflect on IBS and make changes where necessary. Your opinions are therefore very important to us.

1. IBS MODULE 3 – GEAR & S A ECONOMY

1.1. What have been the most valuable aspects of this Economics module of IBS for you? Please explain your answer.

1.2. Which aspects have been of least value to you? Please explain your answer.

1.3. Do you think the module should be offered next year to first years? 
   YES □ NO □

1.4. What improvements would you suggest for next year?
Please consider your whole year's experience in IBS (3 modules) in relation to the intended outcomes of the course, which were:

- To enable students to gain study, research, communication and essay-writing skills which will enable them to cope confidently and productively with university life and also to make links, where appropriate, with a future world of work.

- To enable students to appreciate the relevance of their courses within the current business, South African, and global, context.

- To enable students to excel in their other first-year courses

Assessment of students will therefore seek to establish whether they:

1. have developed an understanding of the interdisciplinary nature of knowledge in the field of Business Studies.

2. are able to apply this interdisciplinary understanding in realistic business situations

3. have developed appropriate academic skills, including research, academic reading and writing skills, critical and analytical thinking, and synthesising information and summarising.

4. have begun to develop skills and attitudes valued in the world of work, including self confidence, problem-solving, working collaboratively and cooperatively, leadership and presentation skills

5. have applied the above understandings and skills to their other courses

3.1 How appropriate do the intended outcomes seem to you? Please explain and offer suggestions for new outcomes.
3.2 Each module had a slightly different focus in terms of these outcomes. Please indicate with a cross, to what extent each module helped you develop the knowledge and skills listed as outcomes and explain your answer.

Module 1: helped
Please explain:

Module 2: helped
Please explain:

Module 1: helped
Please explain:
3.3 Please comment on how you think each module could be improved.

Module 1:

Module 2:

Module 3:

4. After the first semester one student suggested it was not IBS that made EMEC students' achieve excellent June results. He felt it was more the camaraderie and support the students offered one another, and the attention they received from EMEC staff. Please comment on this perception in relation to all 3 modules.

Thank you very much for your help. Good luck in your exams, and please keep in touch with us.
Janet Hesketh
15 October 1997
STUDENT CASE REVIEWS

CASE STUDY: ____________________________________________

Facilitator: ___________________________ Date: ________________

Please mark the appropriate box and then add brief explanatory comments.

1. How useful do you think the case study was in learning about the principles of Accounting, Economics and Business Law in practice?
   Not at all useful  1  2  3  4  6  Very useful

2. How relevant did you find the case study to your studies?
   Not at all relevant  1  2  3  4  6  Most relevant

3. Did the case study relate to a real issue?
   Not at all  1  2  3  4  6  Very realistic

4. How much work did you feel you were asked to do in this case study?
   Far too little  1  2  3  4  6  Far too much

5. How difficult did you find this case study?
   Far too easy  1  2  3  4  6  Far too difficult

6. How much time did you spend:
   Reading the case study __________________________
   Researching possible solutions ______________________
   Analysing ______________________
   Discussing with group mates ______________________
   Writing up ______________________

7. How much material did you feel you were asked to read?
   Far too little  1  2  3  4  6  Far too much

8. Do you think the amount of guidance and instructions provided by the tutor in the case study was:
   Far too little  1  2  3  4  6  Far too much
9. What problems did you experience in undertaking this case study?

________________________________________________________________________

________________________________________________________________________

________________________________________________________________________

(Use a separate page if necessary)

10. How do you feel the case study might be improved?

________________________________________________________________________

________________________________________________________________________

________________________________________________________________________

(Use a separate page if necessary)

11. How biased is the case study? Please explain

________________________________________________________________________

________________________________________________________________________

________________________________________________________________________

(Use a separate page if necessary)

12. Please give your overall assessment of the case study.

________________________________________________________________________

________________________________________________________________________

________________________________________________________________________

(Use a separate page if necessary)
Appendix 9

Methods of assessment to be used in the module (indicate the weighting for each method):

Students will be expected to keep individual portfolios of their work. Assessment will be incremental, continuous, and formative, and tasks will be set which demand a range of skills to be demonstrated within different assessment contexts involving: self-assessment; peer assessment; group assessment; presentations; a researched essay; formal and open-book tests.

<table>
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<th>TASKS AND ASSIGNMENTS</th>
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<tbody>
<tr>
<td>Research project</td>
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<tr>
<td>Business proposal and presentation</td>
<td>20</td>
</tr>
<tr>
<td>Case write-ups</td>
<td>20</td>
</tr>
<tr>
<td>Participation</td>
<td>10</td>
</tr>
<tr>
<td>Test 1</td>
<td>10</td>
</tr>
<tr>
<td>Test 2</td>
<td>20</td>
</tr>
<tr>
<td>If not successful:</td>
<td></td>
</tr>
<tr>
<td>Final examination (three day project)</td>
<td>50</td>
</tr>
</tbody>
</table>

An examination will be set only for those students who achieve between 40% and 49% in their continuous assessment. Marks attained through continuous assessment will form 50% of the final mark, the other 50% being made up by the examination itself. (There will be no further supplementary examination).

Quality will be assured by a system of on-going internal moderation and also by external examination of students' portfolios of work at the end of the module.
Appendix 10

Statement of assessment criteria:

Learners will demonstrate:

- their interdisciplinary understandings if they can effectively draw on disciplinary knowledge from Accounting, Economics and Commercial Law to express coherent, well-structured opinions.
- research skills by producing work containing evidence of independently acquired knowledge, including appropriate sourcing of this knowledge
- writing skills through the construction of clear, well-structured and coherently expressed arguments
- critical / analytical thinking through work revealing enquiry into assumptions underlying the different disciplines and different perspectives within those disciplines, and an ability to draw conclusions, in relation to real-world problems presented through case studies
- summarising skills by expressing in their own words key ideas in business studies.
- synthesising skills by showing they can draw on a number of sources of information to construct their own arguments
- self-confidence by their willingness to offer opinions and ask questions even when this involves risk-taking behaviour, and by being prepared to offer an opinion when called on to do so
- the ability to work collaboratively and co-operatively by showing a willingness to share ideas and workloads, meeting commitments agreed to by the group, the delivery of undertakings, taking turns to listen and speak
- presentation skills by the use of legible, clear visual aids, speaking audibly, making eye contact with the audience, adopting an appropriate pace and presenting a coherent message, while adhering to time limits.
OBJECTIVES OF A CASE STUDY METHOD

You might be asking yourself why we have to do case studies at all. The objectives of using a case study approach are listed below:

1. To add realism to the lectures, enabling students to apply what they have learned
2. To help students to integrate knowledge of the functional areas and to employ principles of each academic subject.
3. To improve students’ decision-making abilities primarily through practice in decision-making.
4. To help students see how actions are related and what they mean in practical as well as theoretical terms.
5. To encourage students to be assertive through participation in class, through defence of their ideas, through the need to ‘seize the floor’ and gain acceptance of their ideas.
6. To practice teamwork within groups, leadership skills and collaboration.
7. To improve students’ communication and listening skills.
8. To develop skills and abilities in critical thinking, analyses and synthesis in the solution of different case studies.
9. To develop reading skills appropriate for academic purposes

APPROACH

Case analyses may be oral, written, debated or a combination of all these. Cases may be structured or unstructured. Students may be asked to take any role, such as that of a principal decision maker, consultant, employee or some other person involved in the case situation. Normally the role of a decision-maker is preferred in that it forces you, as a student, to be responsible for the implementation of the chosen alternative or solution.

Students will be required to engage in pre-class and class analysis of the case in either of two ways - in a group or individually. The group method is used to help you understand and appreciate working in teams and taking decisions jointly. When working in groups it is important to distribute the workload fairly, according to a set criteria (e.g. some to do the research and prepare notes, others to do the comparison and the whole group to do the write up). We are
aware that working in groups can mean that some people will do all the work while other want a “free ride”. You are asked to resist pressure to conform to this habit and be assertive in group meetings. Before the groups meet, each student should go individually through the case study. The steps of analysis are outlined in the following section. When the individual method is used, the student should prepare all the work (her/him)self.

PREPARING A CASE STUDY... A SUGGESTED COURSE OF ACTION

While we all have different styles and approaches, which is really encouraged, we would like to suggest the following format as a way of approaching your case study. This is not prescriptive, but it is the way we shall evaluate your case study analysis. Other approaches are welcome especially if they improve on this and can be well understood.

1. Read the case; become familiar with the situation. After having read it, put the case aside for a while and do something else.

2. Re-read the case, taking the following steps:

   2.1. Summarise important information, using the analysis form provided later in this handout.

   2.2. Identify vision, mission, goals, objectives, process using the SWOT (strengths, weaknesses, opportunities and threats) analysis.

   2.3. Pay special attention to information given especially why it has been given); make notes in a mind map format.

   2.4. Answer the questions asked, and/or develop your own questions and answers.

3. Establish a decision-making framework by asking yourself the following questions:

   - What are the major problems and issues?

   - How do you know about these issues and problems?

   - What are the decision constraints?

   - What are your assumptions?

4. Try to get a comprehensive view of the problem. Do you see the interrelationships of the key variables? If not, go over what you already know until you obtain an overall perspective.
5. Search for alternatives by matching strengths and weaknesses over opportunities and threats. Use the material from text and from your other sources.

6. Choose an appropriate alternative and match this choice against your vision, mission, goals and objectives. Use a SWOT analysis on your alternative. Once you have finished with your analysis, apply your "critical-thinking-sense" to your alternative.

7. Set priorities to your alternative.

8. Be prepared to implement your decisions. You should know how to implement it, gain support for your choice of alternative and if asked to budget for your alternative; you should be able to do so.

9. Review your work.

10. Record the time it has taken you to do your case study.

PARTICIPATION DURING CLASS

The effectiveness of case studies depends on your comments during classes. It requires that you assume responsibility for your own learning, and for the learning of others. Sharing ideas, challenging comments, acknowledging issues, and defending positions are important parts of our learning experience. It would be appreciated if during the class you could do the following:

1. Participate regularly and intelligently. Much of your informal assessment will be based on your participation. We get to know and remember you!

2. Substantiate (defend) your position with facts.

3. Don't participate just to participate. Contribute. You will soon learn that your lecturer and classmates can tell the difference.

4. Recognise that others would have thought and analysed the problem and came to alternatives different from yours. Give due where it is required and criticise when required.

5. Be prepared to “seize the floor”. As part of the case study method, you must be assertive. You must be heard!

6. Recognise that your lecturer/group leader might disagree with you. Defend your position with facts (s/he also depends on those facts!). Your fellow students might also disagree with you... defend your position but accept defeat or compromise graciously. Remember you are what you
know and you have the capacity to learn! And together you can all develop new understandings.

7. Be willing to take risks. If you make a mistake, you make a mistake, but if you don't try, you will never get anywhere. Remember the proverbial saying that we learn by mistakes but it's a fool who learns only by his/her own mistakes...we can also learn from other people's mistakes!

8. Avoid the use of weak words such as "I feel", "It appears", "It tends to be".... be assertive and use such words as "it is a given fact that etc." and give reference.

9. Be prepared to change your mind during discussions of the cases, what good will it do you anyway to have a mind if you can't change it? Others may have presented their cases and highlighted an issue which you have missed or did not pay any special significance to. Changing your mind won't help your written report of the case study or grade, but it will prevent your repeating the same mistake twice. You can add and show your analytical thinking in class which will help your participation informal assessment grade.

10. Try to maintain a general manager's orientation to what you are doing and to what is going on in class. Think of the way you should respond to the others and their positions and points of view, as if you were the project leader of the organisation, and react accordingly. You will be a manager one day!

WRITTEN CASE REPORTS

In this course, you will be expected to follow the traditional problem-solving stages in your report writing.

- Introduce your work as briefly as possible but in a succinct manner. This is an essential part of your work. Remember, you have to use your introduction as a basis for your text from which you will draw your conclusions. Make sure you have thoroughly analysed the situation before you begin writing. Know what you want to say.

- Give an overall perspective of your analysis

- Outline your report, having identified your goal, and fill in your outline.

- Use plenty of appropriate headings and make sure that they follow each other. Cue your paragraphs by asking yourself questions which will introduce your next paragraph. Be methodical and remember, the reader does not think just like you do... prepare her/his state of mind.
• Be specific in the alternatives you recommend and give reasons for your recommendation.

• State your assumptions, those given, implied, and say why you are making them and what an alternative solution would be if those assumptions were not made.

• Indicate how you would implement your decision.

• Use diagrams, graphs, equations and tables where necessary to illustrate your answer.

• Use appropriate report writing formats.

Please note you must try to keep to the number of words required, where the number is stated. A long-winded report does not earn you extra credit. Use your computer programme to count the number of words and try to adhere to the instructions. While on computers, try to use a programme with which you are familiar. Practice can only make perfect!

SOME EXPECTED PROBLEM AREAS

As you work on your case studies, some degree of difficulty may be experienced. Some cases will be easy in that the point or issues on the case will be obvious, while at other times you might need to read and reread the cases before you can identify the major issues. Give yourself time.

YOUR VIEWPOINT...

The other problem which you may encounter is when the case asks you to visualise yourself as a manager and you have never been a manager before nor do you know what managers do! Just imagine yourself being in charge of the situation and follow the instructions given. Remember you have been in charge of your life to some extent, for a number of years now, with your parents, brothers, sisters and friends sometimes acting as part of your team... You have been a Manager!

STRENGTH OF THE ANALYSIS

You will notice that having looked at all the different possible alternatives, you might have missed one or two, which your colleagues haven't missed! Do not despair... this is what happens in the real life situation. Be critical and learn from others.
CASE METHOD AS A DIFFICULT PROCESS

Remember it would be easy for your lecturer to give you a lecture and references. You would only read the relevant chapters and spit the answers back! This is not the idea of the case study method. It is difficult both for your lecturer and yourself to develop and analyse a case. However, the results are very pleasing if you have done your work and applied the relevant text to your cases. The case study method requires that you should think, act and participate and not only be a listener. in order for you to be successful in the outside world, you have to develop these techniques as opposed to merely being receptive and passive. The role of a manager demands that you take an assertive role.

CASE BIAS

You must be aware that the case has been developed by someone else intent on achieving his or her own objectives. As a case writer, s/he has presented certain cases as facts and is of a certain mind and opinion. You will only discover this as you get to do more cases and get to know your case writer better.

It is for this reason that you must always state your assumptions (defining your standpoint) so as to illustrate your own biases to the person who reads your report. This is often difficult if you think that your own standpoint is not important or is inferior to that of your case writer. This is not the point. You must always defend your point of view with facts!

RESULTS AND ANSWERS

There are no right or wrong answers in a case study situation! The test for your results is that they must be implementable and; your answers must be substantiated with facts which are properly referenced and your own opinions must be based on established facts. Always think that if another person were to read your sources, they might consider your answers as some of the alternatives, or they, may accept your answer as a possible alternative. Having said this, some answers or alternatives are better than others because they are based and given with a clear, strong, verifiable analysis, that is, based on proven facts. You can only achieve this if you read your text and search for information from other sources. The wider the sources, the stronger the analysis and the better the answer.

CASE ANALYSIS GUIDELINE

The following format has been prepared only as a guideline. It would be appreciated if by the end of the semester, you are able to design your own guidelines to help you solve your own cases.
CASE ANALYSIS WORKSHEET

Name of the case study:

Tasks:

Your position in the case study:

CASE STUDY DETAILS:

Organisational Mission:

Is there a Mission statement or theme?
What is the overall goal?
What are the related objectives?

Your own assessment:

________________________

________________________

________________________

________________________
PROBLEM IDENTIFICATION

1. What are the major problems?

________________________________________________________________________
________________________________________________________________________
________________________________________________________________________

2. How do you know?

________________________________________________________________________
________________________________________________________________________
________________________________________________________________________

3. What assumptions must be made at this point in order to solve the problem?

________________________________________________________________________
________________________________________________________________________

4. Key issues in the case study:

What are the given assumptions?
Do they have the theoretical base (e.g. economic, accounting and legal principles)
Who are the main role players?
Other implications such as:

   Social factors
   Political/legal factors
   Business competitors
   Substitutions
   Buyers and suppliers
   New market entrants
   Customers

SWOT ANALYSIS

Organisational strengths

General
Marketing
Finance
Operations
Human resources
Information
Management
Environmental
Tip: SWOT = Strengths, weaknesses, opportunities and threats

If you are looking at a case under 'general' this means looking at the general strengths, weaknesses, opportunities and threats. You could then look at the proposed marketing function of the said case study through a SWOT analysis as well. One hopes that you would then look at the financial strengths and weaknesses and go down the list of issues affecting a business. It's possible that some case studies will not have all the different elements (called business environments in business lingo) as listed above.

Organisational weaknesses

General
Marketing
Finance
Human Resources
Operations
Information
Management
Environmental

Opportunities

Economic (general)

Competitive situation
Threats

Economic (general)

Competitive situation

Technological

Social implications

Legal implications
FINANCIAL WORKSHEET (IF ASKED FOR)

1. Total budget of the project
2. Projected cash flow statement
3. Projected Balance sheet
4. Information inferred from the ratio analysis
5. Your comments on the viability of the project

GENERATION OF ALTERNATIVES

List each major alternative course of action and then next to it, list its positive and negative aspects

<table>
<thead>
<tr>
<th>Alternative</th>
<th>Positives</th>
<th>Negatives</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
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<td>4</td>
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</tbody>
</table>

Final alternative

Why this alternative?
Test against SWOT analysis and feasibility
Can it be implemented?
Your recommendations and assumptions for the success of your solution.

IMPLEMENTING YOUR FINAL CHOICE OF ALTERNATIVE

Can you answer the following questions? (Answers should be in your solution.)

- Who will do the implementation?
- Do you have their support?
- How much will it cost? Have the funds been secured?
- Date of implementation (if required).

PARTICIPANT REVIEW OF IBS CASE STUDIES

CASE STUDY: __________________________________________

Facilitator: ___________________________ Date _____________
Key words: Capitalism/free-market system/market economy; communism/command system/command economy; socialism/mixed economy; nationalisation; privatisation; inflation; bureaucracy; entrepreneurs

Learning objectives and background to the case

This case will introduce you to the different economic systems. After reading this case, you should be able to cite the advantages and disadvantages of a free market economy, a mixed economy and a command economy. You should also be able to see the importance of a legal system or judiciary and an accounting system, which form the basic support systems for an economic system.

We need to keep in mind that in any economic system, resources are scarce. Choices have to be made of what to produce, how to produce and for whom to produce. Economic systems often use firms, households and governments to resolve the conflict of choice. It is often said that firms will produce what is needed by the households, while households will offer their labour to the highest possible bidder. All these transactions happen within an economic system chosen by the government and supported by its executive function, which ensures that the laws, regulations and freedom of the people are protected in the course of all business transactions.

In 1991, when the then South African government decided to unban all political parties, there was an outcry that President De Klerk was bringing in the communists who were thereafter going to rule the country. It was reported in the newspapers that the ‘communist government’ which was likely to take over (as represented by some of the political parties) was going to nationalise businesses, instruct producers on what to produce and generally change the economy of the country. Examples of other African countries were given, such as Mozambique, which had decided to adopt the socialist system at its independence in 1975.

In 1983 Gerry Rowland, the President of Ghana (the first independent country in Africa), said that most African countries were disillusioned with communism and would like to move to capitalism. The problem was, however, that ‘Western’ countries (which tended to be capitalist) did not accept African countries as countries in their own right, but saw them merely as markets for their goods. He continued to say that capitalism devalued the traditional way of life. For example, a thatched hut is not considered by ‘Western’ countries to be a proper house, even though brick and mortar houses are not always suitable for the African climate. The capitalist countries were very much aware of this. However, they wanted to sell their bricks and mortar at a price and
then on top of that create a demand for air conditioning! It was all a capitalist ploy! This left the African countries with no choice but to be communist!

Having said this, the Soviets and the Chinese (both considered to be closer to command economic systems than America and England) were as early as 1989 trying to adopt capitalist practices - that is, freer markets, greater reliance on profits, private ownership and so forth - without actually calling this capitalism. On the other hand, we had a number of American citizens at that time who felt that capitalism had gone into excess. There was too much greed, the gap between the rich and poor continued to widen, people were willing to kill their mothers for the sake of making a fast buck, there was too much crime and not enough happiness!

If one is to read the newspapers, one is amazed at the number of companies merging, taking over other companies or forming new companies under a new name. It could be argued that these actions are driven by greed, as well as by lust for power and control - or is it simply economic efficiency? Another popular topic is that of the government trying to off load its State enterprises onto private ownership - privatisation. Reasons given for privatisation are the great inefficiency and bureaucracy of state businesses that costs taxpayers a lot of money. State enterprises represent a form of state intervention in the marketplace that is not very far removed from a command system.

The two systems, capitalism and communism, are different - and the difference is the 'market'.

One system (capitalism) sees economic behaviour in terms of free markets. For this school of thought, economic behaviour centres on producers and consumers and the resulting exchange of goods and services between the two. Producers supply, consumers demand and the process of supply and demand is regulated by the market which fixes value or price for the goods produced and consumed (Adam Smith's invisible hand).

Which comes first? Demand or supply? This is where there is a difference of opinion within the 'free-market' school of thought. The neo-classical school of thought believes that the consumer comes first. They believe that the consumer has preferences, tastes and talents. Talents are used to produce what s/he prefers or can offer to the market in return for a profit. Preferences and tastes lead to consumers making choices for what they prefer and want. Those who ascribe to this school of thought can be called 'subjective preference theorists', since the consumer is the dynamic. They believe that the consumer actually determines the value of the product by paying a price for it. To the subjective preference theorists (SPT), demand determines value and their economic system (policy) will be for the promotion of demand, private ownership, the individual as the most important person in the economic process. Supply only determines quantity.

Staying within the 'free market' thinking, other economic scholars see the cost of producing an article as being the determinant of its price. Cost involves the value paid for the factors used in production - which includes actual labour-
wages paid out, cost of capital in the form of interest paid out to lending institutions, money paid out for machinery (including depreciation) and other capital goods used for production, the money paid for land and the money paid to people who own the original idea and co-ordinate all the business activities - entrepreneurs. These economists put a heavy emphasis on the four factors of production (land, labour, capital and entrepreneurial skills). They believe that the price is determined by the supply. If the cost of producing certain goods and services is low, then more goods will be available in the market at a set price. Producers can never sell at a loss no matter what consumers are demanding. If the consumers are not willing to pay the price, goods are withdrawn from the market. This is known as supply side economics.

**Communism**, or a controlled system, theorises that consumers and producers are interdependent, each affecting the other. Consumers, producers and State officials form the citizens of a country. They have a dialectical relationship. The producer produces for the good of all. The decisions about what to produce, the cost of production and for which target market/s to produce are made centrally (hence ‘command’ state). These scholars see economic transactions affecting both the consumer and the producer within a distinct ideological, moral and political environment. They hold that people are socially interdependent, rather than a consumer or producer being independent and being able to unilaterally make economic decisions. They think that both parties act together and their interaction reflects the power ratio within a society. Economic value or price could then be determined by the powerful members of a society, those who control or have access to scarce resources and use their power to influence economic policy. If one then assumes that the State is elected by the people and is there for the people, with the people, then the State has the power to control and command economic activity.

Between capitalism/market economy and communism/command economy, lies the mixed economy – in some texts referred to as socialism. According to this theory, the chief industries of a country should be owned and controlled by the government. Smaller industries, or those of not such great strategic interest, are left in private control. Economic decisions are therefore made partly by the government and partly by the market (hence mixed economy).

Faced with these issues, we think that if one were to ask a person what system he would prefer, one would then get an answer based on how he describes and defines economics. If he is a subjective preference theorist, he will then have policies that will promote the interests of the individual. He might even have a tax policy that will favour the man on the street and lay a heavy burden on business enterprises that are producing the goods. Within this scenario if some members of the society were poor, they will only have themselves to blame. Poverty could be a result of them not having been endowed with talents as well as their failure to make wise choices. The poverty gap is not a direct result of an economic system but a result of peoples' preferences, tastes and talents.
If he is a cost of production theorist, he can make sure that the cost of producing goods and services is kept to a minimum so as to have the goods available on the market. He would then try to balance peoples' income and the amount of goods produced so that he could avoid cost-pushed inflation. Any labour activity such as a basic minimum wage would be frowned upon since this has a tendency of higher production costs and labour disputes.

If he believes in the dialectical relationship of people within a society, he will go out to find people who have certain talents and try and fit them within an economic system which would produce for all. What he might be missing would be that such people might lack the incentive to be creative and efficient. Their daily needs would be met. He might overcome this by having a strong patriotic campaign and promotion of the people involved into the decision making structure of the economic process.

The sort of company law that would be enacted would depend on the economic system. For example in a capitalistic system, factors of production need to be protected. Since these factors of production can be individually owned, the economic right of the individual needs to be protected. Accounting systems will need to show the amount of capital employed (that is, the value of the factors of production) and the amount of income derived from this employment of capital. The difference will then be generally known as profit, but profit before tax! The State has to be paid for maintaining law and order and protecting individual rights (Please note that individual rights in this sense includes both legal personae, natural and juristic).

No matter how you look at it, all systems have merits and demerits. Economic scholars have to be critical of any system and adopt that system that best serves their interest.

References (in addition to your texts):

Below you will find definitions of some of the key words for this case. Space has been left for you to add your own notes and examples.

<table>
<thead>
<tr>
<th>Term</th>
<th>Definition</th>
</tr>
</thead>
<tbody>
<tr>
<td>BUREAUCRACY</td>
<td>&quot;excessive or complicated official routine, especially because of too many departments and offices&quot; (OALD, 1989:151)</td>
</tr>
<tr>
<td>CAPITALISM</td>
<td>&quot;Economic system in which a country's trade and industry are controlled by private owners for profit, rather than by the state&quot; (OALD, 1989:167). Also known as the market system, free-market system, or free enterprise.</td>
</tr>
<tr>
<td>COMMUNISM</td>
<td>&quot;Social and economic system in which there is no private ownership and the means of production belong to all members of society&quot; (OALD, 1989:233). Also known as the command system.</td>
</tr>
<tr>
<td>ENTREPRENEUR</td>
<td>&quot;Person who starts or organises a commercial enterprise, especially one involving financial risk&quot; (OALD, 1989:403).</td>
</tr>
<tr>
<td>INFLATION</td>
<td>&quot;Rise in the price of goods and services. There are two major types: 'demand-pull' is the classic one, of too much available money chasing too few goods, while 'cost-push' is based on rising costs of production resulting from the upward push of wage rates or profit margins&quot; (Epstein and Liebman, 1987:113)</td>
</tr>
<tr>
<td>NATIONALISATION</td>
<td>Nationalised industries are &quot;Industries owned by the public, i.e. in the direct control of the government&quot; (Greener, 1980:231).</td>
</tr>
<tr>
<td>PRIVATISATION</td>
<td>&quot;Turning an organisation currently being run by a government agency over to a private for-profit organisation. For example, prisons are being privatised to reduce government spending, improve services and enhance cost effectiveness&quot; (Epstein and Liebman, 1987:177).</td>
</tr>
<tr>
<td>SOCIALISM</td>
<td>&quot;Political and economic theory advocating that a country's land, transport, natural resources and chief industries should be owned and controlled by the whole community or by the state, and that wealth should be equally distributed&quot; (OALD, 1989:1213). Also known as a mixed economy.</td>
</tr>
</tbody>
</table>
REFERENCES FOR GLOSSARY


YOUR TASK

You have been approached by Trevor Manuel, the Finance Minister, to offer advice on which economic system you think will best bring about economic growth in SA and will ensure that the population of SA is secure. Your response should cover:

➤ the advantages of your recommended system over other systems

➤ the disadvantages of your recommended system (along with suggestions on how the government should try to deal with these)

➤ an outline of what sort of legal and accounting systems would have to be in place to support the economic system that you recommend.

Criteria are the same as for previous case write-up.
A CASE STUDY: SIZWE INDUSTRIES

Key concepts: loan; business proposal; unsecured loan; financing; business venture; cash flow; equity; manufacturing; development.

In November 1996 Michael Sinclair, a senior loan manager of the Top National Bank (TNB) in Durban, was reviewing a unique business proposal which had been submitted by Sizwe Industries, a community-based business group. Sizwe Industries requested an unsecured loan of R200 000 with which to start a clay-brick manufacturing business. The R200 000 loan was being sought to enable Sizwe to fulfil a business contract with Woza Nawe Construction Company, which had been awarded small-housing building contract by the government. The R200 000 was needed to enable Sizwe to supply the R300 000 required to obtain a Small Business Development Agency (SBDA) guaranteed loan of R1 700 000 from a large insurance company. Sizwe's investment would thus be R100 000 and would support R1 900 000 of loans.

Income had been projected to be R360 000 nett of interest and taxes in the first year and to total R4 780 000 by the end of the fifth year. This proposal appeared sound to Sizwe Industries. Cash flow projections for the five years indicated that further loans to finance operations would not be necessary.

The uniqueness of the loan proposal lay in the fact that the bank had never before extended, or even considered extending, unsecured loans for the formation of 'high risk' community-owned businesses. Mr. Sinclair was considering the proposal on this occasion because of his familiarity with the personalities involved and the history of the project, and because of his realisation that the bank was virtually the last resort for the project. As he had promised to make a decision that afternoon, he decided to review the entire proposal thoroughly once again.

Mr. Sinclair was concerned with six general areas of analysis:

1. First, he wondered about the risk of the loan requested and the soundness of the income and cash flow projections.

2. Second, were there any alternate financing options (e.g. a consortium of lenders) that might take some of the risk burden off TNB? For example, he thought it might be possible to strengthen the capital base with more equity from private sources. He knew that Sizwe Industries had sought equity, but he thought he might be able to attract other private sources if he had more time.

3. Third, he considered what restrictions he should place on the loan if he did grant it. He would have to determine such items as duration of the loan, an appropriate and reasonable interest rate and an authorisation schedule.
4. Fourth, he thought the issue of control would prove the most difficult if the loan were to be granted. He decided that close monitoring of the company’s financial condition would be essential. Cash management, use of funds, use of earnings, budgeting and production costs would be of direct concern to the bank. Yet Mr. Sinclair realised that the threat of ‘outside control’ was a highly sensitive issue in community-owned and driven businesses. He would somehow have to protect the bank’s interest without appearing to run the business.

5. Fifth, he realised that if the loan should default, and should he then have to call it in, much more harm might be done to the bank’s goodwill than if he were to reject the loan now.

6. Finally, more generally, Mr. Sinclair wondered whether he might be setting a precedent that would be difficult to avoid in the future. For the longer term, he thought there might be vehicles for such investments and decided to investigate them when he had more time.

Mr. Sinclair was also troubled that he might be imputing more risk to the business venture than was warranted because of the possible biases he might unknowingly have against community-owned ventures, a charge communities often levied against banks. After all, the product was fairly simple to manufacture. The manager, Mr. Khumalo, had considerable experience in the industry. The letter of intent from Woza Nawe to purchase the clay bricks was encouraging and guaranteed by the RDP contract.

He also remembered that a major life insurance company was willing to commit R1 700 000 of its own money on the basis of financial statements drawn up by a major accounting firm, which had also agreed to devise an accounting system. The business had received extensive support from a national business assistance organisation and from the Economic Development Centre (EDC) which is part of the Masakhane project, which was launched by the (former) President, Madiba himself, a few years ago. For this reason, he wanted to review the business proposal as objectively as possible before taking into account the social and political importance of his decision.

BACKGROUND

Top National Bank is the largest bank in the city, as well as nation-wide. In 1995, the bank’s assets were well over R5 000 million. The bank has experienced phenomenal growth since its founding in 1987 after changing its name from British Colonial Top Bank (BCTB). The bank’s officials attribute this growth to its excellent image of progressive, personal service to the growing metropolitan area. To reinforce its image, the bank has encouraged its officials and personnel to become involved in community issues and in bringing about change in the country. This has led to officials often supporting community
improvement programmes. An analysis of the bank’s commercial and personal accounts revealed that it serviced a broad area, including all parts of Durban.

In September 1996, a preliminary feasibility study conducted by the Economic Development Centre (EDC) for a clay brick producing company in Durban projected a first year after-tax profit of R360 000 from an initial investment of R2 000 000. The intensive study that followed projected detailed income and cash flow statements five years into the future and indicated that the venture could be extremely profitable.

Sales were estimated at R7 000 000 for the first year. Since these sales would be generated from reputable Durban and national businesses, it was thought that accounts receivable would not age very long and would be highly secure. The product line was simple to manufacture and had a fairly stable industrial demand from Woza Nawe and a number of other clay brick users. The low-skill requirements would assist in the training of hard core unemployed workers, which is a primary objective of the Sizwe Industrial company. In addition related product lines, such as low-quality clay bricks for paving and security walls, could ultimately be developed, not only providing more sales volume, but also increasing the employees’ skills and business initiatives.

The proposed company (Sizwe Industries) is sponsored by Sizwe, a community organisation based in Durban and composed primarily of black communities, some of whom have prison records (for failing to produce their reference books as and when demanded and other pre-1994 statutory offences).

The project has encouraged the hopes of Luyt van der Merwe, head of the EDC and also a prime backer of this business proposal. Still, the project faced what Mr Van der Merwe considered to be the major problem of community business development: how people who were prevented, for whatever reason, from accumulating capital could fund new business ventures. The dimensions and reality of this problem of poverty around Durban had been documented by an internal study just completed by the EDC. This study about the urgency of the problem virtually at the bank’s front door had impressed Mr. Sinclair deeply.

THE PROBLEMS OF ECONOMIC DEVELOPMENT

Mr Van de Merwe’s commitment to the potential of urban economic development grew out of his long experience in the Free State’s rural development programmes in the early sixties. He had come to realise the urgency of such concepts and programmes in the poor areas of the country through his employment with the Afrikaans Boers Versogen (ABV), which was the largest Afrikaans community outreach programme in the country. That experience led him to conclude that economic development could never work without an agency or fund that could provide equity capital to disadvantaged
businesses and thus allow them to obtain the funds available from government agencies and from private sources.

The EDC accepted its new role in June 1994, with the objective of developing an integrated programme for community-wide economic development. To accomplish this goal, the EDC used its connection with progressive organisations such as Kagiso Outreach (KO) to establish credibility among community groups in the country, as well as its connections with the established business sector. Links with community organisations were developed by Sipho Zulu, who has extensive knowledge of the Durban area. The EDC then looked at the big businesses in the area to provide various resources. Ultimately, commitments of 100 hours of technical services per year per corporation were obtained from 110 companies and formed a Technical Assistance Pool (TAP), available to community businesses through EDC. This management-community relationship helped EDC to form over 40 community-owned businesses in the three-year period following its changed role. Mr. van der Merwe thought that by encouraging Sizwe Industries to go for a bank loan, he would be releasing Sizwe's potential for business so that the next time the company were to be involved in another kind of business, they would be able to get conventional funding from an established banking institution.

**YOUR TASK**

Mr Sinclair has to make a decision about this loan. In order to spread the risk of making a wrong decision, he has decided to call a meeting of senior bank staff to discuss the issues involved. You have just joined the bank after obtaining your B.Com degree (*cum laude*) from the well-thought-of University of Natal. Besides your academic knowledge, the other staff members are very much interested in you and your ideas because they have been responsible for your fees at the University and, most importantly, they feel that you have come from a previously disadvantaged community and believe that you are still an active member of that community. What would you advise the bank to do?

After having advised the bank, you are on your way home when you meet Mr. Khumalo and he gives you a long story about his business application to the bank you work for. He is full of hope that since you work for that bank you will be able to do what the previous bank's staff were not able to do - that is, grant him his loan because you understand the community situation. You are faced with this problem: you know the bank's lending principles, you can read and understand a business proposal, you also understand Mr Khumalo's position and you would like to advance yourself within the bank's executive ladder. You decide to explain all these issues to Mr. Khumalo. Mr. Khumalo nods and is very happy that you show such deep understanding. He then asks you to be his private consultant on the issue. What advice would you give to Sizwe Industries? What alternatives are available to Sizwe Industries?
Criteria for assessment are the same as for previous write-ups.

**GLOSSARY OF TERMS**

<table>
<thead>
<tr>
<th>ACCOUNTS RECEIVABLE</th>
<th>What the business is owed.</th>
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<tbody>
<tr>
<td>BUSINESS PLAN</td>
<td>“Marketing, personnel, production and financial plan of a proposed new business, generally presented to potential lenders or investors” (Epstein and Liebman, 1987: 29).</td>
</tr>
<tr>
<td>CASH FLOW</td>
<td>“Measure of a company’s ability to meet its expenses. Relates to timing as well as size of income stream” (Epstein and Liebman, 1987:34). “...the cash coming in and the cash going out during the financial year...” (Greener, 1980:289).</td>
</tr>
<tr>
<td>FINANCE</td>
<td>“Money used or needed to support an undertaking” (OALD, 1989: 454).</td>
</tr>
<tr>
<td>GOODWILL</td>
<td>“Intangible assets of a firm, such as reputation or location, which make it worth more to a buyer than its book value” (Epstein and Liebman, 1987:100).</td>
</tr>
<tr>
<td>UNSECURED LOAN</td>
<td>Security is “something given or guaranteed by the borrower (and/or a third party) as a safeguard for a loan” (Greener, 1980:281). An unsecured loan is thus a loan where no security is provided.</td>
</tr>
</tbody>
</table>

**REFERENCES FOR GLOSSARY**

Appendix 14

EXCERPT FROM FACILITATOR'S MANUAL (NGUBANE, 1998)
CASE STUDY TWO : The Irony of Capital

6.1. Introduction for facilitators

The main objective of this case is to introduce the various schools of thought in Economics. By the end of this session, students should have a general understanding of the three main economic systems and how they affect the business environment. Students should also appreciate that the choice of an economic system affects the type of business that can be carried out in a particular country.

This case study tries to introduce the students to the thinking of why markets and economic systems exist. It is the first attempt to try to integrate commercial studies by defining the underlying reasons why certain economic systems are preferred to others.

6.2 Structure of the case

The case is initially set in the history of South Africa and its political choices. It tries to bring home the point that the choice of economic systems is dynamic and depends on the ruling party of the time. The introductory part is meant to bring this realisation closer to home and within the experience of the students. It then gives examples of other countries in Africa that have had to make choices on the economic systems and have chosen systems closer to the command system as compared to South Africa. Ghana is used as a country which has gone out of its way to articulate the difficulties young democracies experience when faced with the decision of which choice to take. The case then moves into the different economic systems and tries to give an overview of the different systems.

After reading this case, students should be able to cite the advantages and disadvantages of a market system and a command system. They should also be able to see the importance of a legal system or judiciary and an accounting system which form the basic support systems for a market system. The case also introduces the concept of scarcity as an overall concept in all economic systems and the concept of choice. It also tries to introduce the economic model emphasising the role of the public sector as the first sector which has to make the choice. The functions of a legal system and an accounting system are also introduced, together with other economic concepts such as privatisation. The perception or conclusion which this case wants to draw is that no country has a pure economic system within the wide continuum spanning from the command to free market system. It tries to argue that each country finds a system closer to its own needs or those needs as argued upon by the people of that country.
The subject content is primarily economics. The following concepts are introduced:

- choice
- command system
- free market system
- capitalism
- price and value
- subjective preference theory as a theory towards price determination
- cost of production theory as a theory towards price determination
- labour theory of value as a critique of the two above theories
- legal institutions which are needed to support an economic system
- accounting systems and procedures as a support tool for common economic systems
- the concept of privatisation

6.3 Role of the facilitator

6.3.1 Choice of the case

This case has been chosen because the students, at this time of the year, have already had at least one week of lectures in all their commercial subjects. They are at a time when they feel that different subjects have different strengths and can be compartmentalised. If they happen to see how the different subjects relate to one another, they lack the necessary confidence to point this out and hold an academic opinion. This case is then meant to show the relationship and confirm that a link between different commercial subjects exists.

Depending on the age of the students, the case might be outdated. For example, if this is 1999, students coming to the university might have been ten years old when De Klerk unbanned the political parties (assuming they are now eighteen) and it is fairly possible that they might have been only eight years old! As a facilitator you may want either to give a really moving account of history, which may capture the students' interest or decide to rewrite and modify the case. This can be done without altering the essence of the case. For example, 1994 or 1999 could be used as a year for significant political change in South Africa. Mandela could be substituted by the new President; the same applies for all the political names used in the case study.

6.3.2 Advisor to the class

The students have been asked to assume a specific role, that is, as advisor to the Minister of Finance. As has been said before, the facilitator's advice to the group may be two-fold. First, the facilitator will be presenting a case. S/he will
give the overview of the case and set it into present context, suitable for the particular group. S/he will give advice which will be based on the content of the case. The group might want to know what the role of a Finance Minister is and how this is connected to the political system. In this particular case, the group might want to know why Economics is no longer called Political Economics as it was originally called. The facilitator will have to field these kinds of questions - bearing in mind, however, the element of research. The latter question might reflect that students have read about the work of writers such as Ricardo and might want to be encouraged to read or that they are making common sense connections which then the facilitator might want to give the theoretical foundations for. Students should be encouraged to do their own research and the facilitator will have to give relevant reference material for the content. The facilitator might want to link this with what the students are doing in their Economics class. If one were to look at 'political economy' terminology, the facilitator might want to bring an overview of economic history, bring in Adam Smith and the concept of specialisation. This will inevitably bring in other concepts such as the invisible hand, demand and supply and markets. The facilitator can give overviews and ask students to look these up. This kind of research would teach students how to use the library and the reference section while imparting some economic information to them since they are economic and management students! Facilitators must be able to provide information which is not included in the case study. This must be asked for and not freely given.

Second, the facilitator will be an advisor on the process itself. In the previous case, the facilitator was looking at certain skills such as reading and summarising. The facilitator may want to confirm or change the initial assumptions made on certain students. Besides the main objectives of this case, as mentioned above, educational development objectives should be included. These will include: analysis, reading for a purpose, synthesis, summarising and mind mapping. It is not the intention of this manual to instruct facilitators how to teach mind mapping, for example, to students. However, it may be said that students, by this time, start regarding the facilitator as a group leader and will try to 'copy' the facilitator. If the facilitator were to use mind maps to explain the different facets of the case, link these up and show how effective mind maps are in linking and organising thoughts, it has been our experience that students 'copy' mind maps and use them effectively without having to go into the whole theory of mind maps.

6.4 Expectations from the students

Students are given a hand-out at the beginning of the course which informs them about the course. It also informs them, generally, of what is expected of them. In this particular case, the facilitator expects students to have read the case before coming to class. This is not like the first case where the case is brought to class cold. The facilitator would like to find out whether students have read the case or not. Not all students might have read the case. The facilitator would have to decide what to do if some students or most of the students have not read the case. This decision is entirely in the hands of the
facilitator. S/he may want to 'tell them off'; give a lecture on how important it is to follow instructions; lecture students on the importance of reading while telling them the university's failure rate; inquire from students as to why they have not read the case and then run a time management session. The list is endless. However, facilitators may want to be reminded as to what they are planning to achieve - their learning outcomes and short term goals. Any behaviour, in a situation like above, should be used to achieve the defined learning outcomes (we suggest) and not an emotional or 'personal principle' trip.

The facilitator will also expect students to have made a summary of the main issues of the case, according to the handed-out format of case analysis. Our experience shows that students are very much attached to their main issues and it may be prudent to ask the students to present their individual main issue summaries.

Facilitator will also expect students to discuss the case, making links with other subjects. If students have read the case, this is usually not a problem.

Facilitators will also expect students to behave in a particular manner as displayed in the last case study. This, we hold, is very important. Facilitators must have these expectations. These expectations form a basis for subjective assessment of how students participate in class. Some students may not have participated in the previous session and may have been 'branded' shy or non-participative. They may now 'seize the floor' and be very vocal. This may mean that another assessment needs to be done which is a continuous process in students' assessment.

6.5 Possible outcomes

This case has no right and wrong answers. A number of possible suggestions may be offered to the Finance Minister. These will need to be evaluated. Evaluating them, in our experience, has led the group to take three distinct positions. Some members of the group will feel that the command system is the best system since the whole profit motive drive does not exist. Other students would take the free market system since they believe this holds the best route while some prefer a mixed system.

These outcomes often lead to a very meaningful debate as to which system is best. The facilitator's role is to give credence to any system without showing his/her bias. This is often difficult and the time is limited. The role of the facilitator may be to shift such discussions towards the different theories which determine value, that is, price. This will be discussed further in the case presentation example below.
6.7. Case presentation: an example.

The following information is based on the experience we have had over the last two years. It should not be taken as gospel but serves to illustrate the points we have been trying to make. Each and every case will need a different introduction. This will depend on the level of rapport the facilitator has developed with the group during the previous sessions. With this in mind, may we suggest the following process:

- We would recommend that you give a summary of the last case, its learning objectives and how this present case fits in the whole big picture. Establish clear educational objectives for this session and show how these are derived from the previous case and stand on their own right. You may not want to continue if you feel that you still need to go back to the previous case, for example, if you find that it had genuinely taken 3 days for students to read this case. There are a number of options which you may want to take (as said previously). However, educational objectives need to be stressed from the outset.

- Explain the process you would like to follow and look out for body language of the students, confirming or rejecting an initial opinion formed during the last group session.

- Provide an overview of the case study. This will cover the objectives of the case, the methods involved and what you expect from the students.

- Explain the tasks (students' tasks) in a clear non-ambiguous way. Establish the fact that you might change these tasks as you see fit during the course of the session. From our experience, students expect you to be the leader, if not an autocratic leader, and they are not very sure of the teaching method used.

- Set a realistic time for the students to read the case, giving the source of the material. While on this, you may want to throw in a word or two about the importance of referencing.

- Students are supposed to have read the case. Give students time to present what they consider as the main issues in this case study. Try to group these issues according to the different schools of thought as presented in the case. Mentally group the students as well. You may test your 'mental' grouping when students are asked to form groups according to their main issue identification. You may ask the students to give you a sentence which summarises the case. This will create a lot of laughs and noise which you will have to contain.
• Proceed with the identification of the main issues of the case studies. The case can really be divided into three sections. The first section is the historical part of a country's development, giving the setting for choices to be made; the second part is that of economic systems; the third one being the reasons why economic systems exist, that is, the process of according value to goods and services produced in a country for market or exchange purposes. The last section tries to link the legal and the accounting framework to an economic system and holds that an economic system determines the legal/accounting system in a country.

• The first section, in our experience, does not generate that much discussion. Students may want to find out who Gerry Rowland is or where Ghana is. They may make jokes about the different people and allocate themselves certain name tags, for example, Mrs Emmanuel or Madiba's son!

• The second section generates some heated arguments. We have noticed that students try to show how much they know about particular economic systems. This may take the whole session and you may want to break the class. We would suggest that you try and steer the discussion to the reasons why such systems exist, and away from the political posturing to economic ones. You may want to define humankind as an economic being and contrast this to a social being, drawing on the differences between the two. We have found that giving the students the task to write up their views (limited to one page) has worked very well as homework.

• The third section (cost of production theory, subjective preference theory and the labour theory of value) often comes automatically when students have chosen their economic system. We have not ever experienced an instance where a student had chosen a free market economy and then held that the labour theory of value could be used to determine the price in such a system. It might happen and when it does, we may have a new school of thought in Economics!

• We would think that as a facilitator during the above discussion, you would be trying to link the discussion with what is happening in the other courses. Works done by Paul Samuelson, Galbraith, Cole, John Stuart Mills, Keynes, Pigou, Marx and Engels in economics may come handy.

• The fourth section is where students apply their different positions in the identification of a suitable legal system and accounting system which will optimise their economic system. This is where integration comes into play. Students should understand why Roman Dutch Law is different and yet similar to English law and why accounting systems are similar to most capitalistic countries.
• Group formation, in this case, may be according to interest groups and then to different interest groups as the case progresses. Our experience shows that students may change sides during the discussions and be very vocal about one system to the others. Try to form students into groups of not more than 6 to discuss the various issues. (You may find it useful to use the guidelines suggested in Appendix 2 (appendix 11 in this study). You may want to break up the case analysis suggestions and only do a certain part, e.g. doing only the problem identification part and then doing SWOT analysis at a later stage.) If you have students remaining after group formation, task these students as observers to the process of the groups and have them report back on the groups’ process at a later stage.

• Allow the groups to report back and encourage debate.

• Do not summarise the case; give a summary of what has been done for the session and ask the students to write down what they think are the main issues of the case or a summary of the case. This they have to do strictly on one page (hand-written) and have to submit the following day. Where relevant, give further reading references on the topic.

• Issue a case evaluation form (Appendix 1) and ask the students to fill this in and return it to you before the end of the period or day. While the case may not be relevant to IBS per se, evaluating the case will introduce students to case evaluation.

• At the end of the session, record your second impressions of the class and try to reconcile these with your first stated objectives and learning outcomes. This will act as your first assessment of how the students participate in class.

• When marking the students’ work: students may tend to use economic concept words in a non economic usage of the terms. These may include inflation, environment, political power, choice and scarcity. In your notes, refer them to the relevant pages in their books where they can find the correct usage of the term.

It is advisable to give a report-back during the next session. What you would have achieved is getting to know your class better. This case may be used to identify any information gap. You may want to write another short case study to ‘fix’ those gaps or may decide to move to the next case.
References


Parkin and King Chapter 1 pages 7-25 for general economic concepts
Chapter 39 pages 1006-1027 for different economic systems


7. CASE THREE: Sizwe Industries

7.1. Introduction for facilitators.

This case represents a follow up on the last case, that is, an introduction to economic systems and choices as to which system is suitable for the country. This is a post-1994 South African case study, largely driven by the government’s policy on the Reconstruction and Development Programme, (RDP). The main objective of this case study is to help students integrate the knowledge gained from other courses and to see how these relate to each other. Secondary objectives have been mentioned in the previous cases. These include synthesis, reading, articulation, critical and logical thinking.

The setting is within a financial institution grappling with transformation and the maintenance of well established banking principles. It also features the black student or newly qualified technocrat who has to live in two worlds, the business world and the social world, both worlds exerting their own demands. It is hard to define whether this is an economic case, money and banking, legal rights or a securities case. All these concepts have been brought together in a hypothetical real-life situation.

The case may be outdated. For example, the RDP programme might have been replaced by the GEAR programme which also might have been replaced by a ‘South Africa in Africa’ renaissance programme. As a facilitator, you may be required to make certain changes.

This case has been chosen in that it represents a variety of concepts which might capture the students’ interest at this time of the year. It represents how government’s decisions are made to bear on an ordinary banking decision. It also introduces different environments surrounding a business enterprise. This case may be done in sections and may extend over a longer period than envisaged. If this happens to be the case, facilitators are advised to try to build in other objectives per session which would lead them towards the satisfaction of more than one learning outcome.

7.2. Structure of the case.

The case starts by giving technical information regarding the financial needs and gearing of capital for a business enterprise. It illustrates a very good example of financial planning and business presentation, emphasising the need for projected income before an establishment is undertaken.

The next section deals with capital acquisition - in this instance, in the form of a loan. It then informs the students about the principles of decision making in the granting of loans and brings in the concept of security. This section also
offers the bank's own integrity and values when it comes to dealing with clients. This has been done deliberately to show that while banks are *juristic personae*, they also have a track record to defend like everybody else. This section represents the external/internal environment of a business enterprise. While the entrepreneur cannot grant himself a loan, capitalisation is an internal problem to a new business. The business must look for sources of funds which it can afford. This brings in the discussion of different forms of capital (a business management issue), the expense of capital (an accounting issue) and pricing (a marketing issue).

The second section gives the background as to the different role-players' viewpoints. This section illustrates how the external environment (the political system in this case) can directly affect business decisions. The bank is aware that the possibility of having future black clients, like Mr. Khumalo, is very high. This is the bank's first encounter and it would like to handle it well. Mr. Khumalo, on the other hand, feels that a government contract should secure a loan even if he does not have any business management training. Sales are secured, therefore the bank should not quibble. Both these are external factors and students should be encouraged to view them as such and try to internalise the debate.

This section also brings in the other role-players in the financing market and displays the universality of credit assessment. The fact that other institutional houses are prepared to underwrite the loan brings the element of risk down.

The fourth part of the case has an economic nature: the problems of economic development and job creation. This is a macroeconomic question which has been brought to bear on microeconomic decision-making. The linkages are clearly illustrated in this case study.

The legal aspect is brought in by the claim that the proposed entrepreneurs have criminal records. This brings in the case of ethics in law and questions such as the classification of criminal activities. It also gives general views of how other people view crime (pass laws) while other people consider such crime as a political oppression.

This case may be done in different sections. The main aim of the case is to bring about all these concepts into a meaningful decision-making model.

7.3. Role of the facilitator.

The role of a facilitator still remains, more or less, the same as in the other case studies.
7.3.1. Choice of case study.

This case has been chosen because the students, at this time of the year, have already had a number of weeks to settle down to University learning. Tests might have been scheduled and the reality of learning has settled in.

7.3.2. Advisor to the class

The students have been asked to assume a specific role, that of a business technocrat, new and wanting to climb up the ladder; also they have been made part of the community, trapped in the poverty cycle. As been said before, the facilitator's advice to the group may be two-fold. First, the facilitator will be presenting a case. S/he will give the overview of the case and set it into present context, suitable for the particular group. S/he will give advice which will be based on the content of the case. The group might want to know what is the role of a loan manager. In this particular case, the group might want to know why the bank does not want to give a blanket loan, knowing that the government has basically guaranteed the market. The facilitator will have to field these questions. Students should be encouraged to do their own research and the facilitator will have to give relevant reference material for the content. It is advised that the facilitator link this with what the students are doing in their Commercial Law, Accounting and Economics classes. During the second semester, Commercial Law students will be doing securities as a topic. These links will inevitably bring in other concepts such as sources of law, law enforcement, markets, interest and the calculation thereof, security or collateral, supply and demand, management and a whole lot more that we can enumerate. Facilitators must be able to provide information which is not included in the case study. This must be asked for and not freely given.

Second, the facilitator will be an advisor on the process itself. In the previous case, the facilitator was looking at certain skills such as reading and summarising. The facilitator may want to confirm or change the initial assumptions made on certain students. Besides the main objectives of this case, as mentioned above, educational development objectives should be included. These will include: analysis, reading for a purpose, synthesis, summarising and mind mapping. Mind mapping will still need to be reinforced by example as mentioned previously.

7.4. Expectations from the students.

Students are expected to read the case study. This is one case study that students cannot bluff their way through without understanding the first part of the case. Facilitators will be able to assess skills such as reading with understanding and the clear identification of main issues when working with this case study. The facilitator will also expect students to have made a summary of the main issues of the case, according to the handed-out format of case analysis. Since these may be diverse, facilitators are encouraged to group the students according to the structure of the case and to come out with issues affecting particular sections of the case.
Facilitators will also expect students to behave in a particular manner as displayed in the last case study. This, we hold, is very important. Facilitators must have these expectations. These expectations form a basis for subjective assessment of how students participate in class. Some students may not have participated in the previous session and may have been 'branded' shy or non-participative. They may now 'seize the floor' and be very vocal. This may mean that another assessment needs to be done which is a continuous process in students' assessment.

7.5. Possible outcomes.

This case represents an example of where there are no outcomes. When this case was prepared, one section of the case was left out. This is an accounting section which should show a Projected Income Statement for the number of years the loan has been asked for, with supporting balance sheets. The students could be asked to prepare these and they can be used in the implementation of the suggested outcome.

7.7. Case presentation: an example.

In our experience, this has been a lovely case to present. We think it is because the students can identify with all parties involved in the decision-making. By this time, students will be aware of what the facilitator is trying to do. Second, they will be aware of the difference between IBS and other courses offered at the University. They will also be aware of what is required from them, in terms of, case preparation, summarising the main issues and holding the floor. A new stress will be all the tests which they are supposed to write in other subjects. This brings an element of life skills education, the ability to be honest with oneself. The case presentation will not be very different from the other cases.

- We would recommend that you give a summary of the last case, its learning objectives and how this present case fits in the whole big picture. Establish clear educational objectives for this session and show how these are derived from the previous case and stand on their own right.
- Try to introduce the business proposals which the students will have to do in the near future. Also introduce the essay projects which the students will be doing (or are doing) and try to link these with the present case study.
- Explain the process you would like to follow and look out for body language of the students, confirming or rejecting an initial opinion formed during the last group session.
- Provide an overview of the case study. This will cover the objectives of the case, the methods involved and what you expect from the
students. Some questions may be expected regarding the first part of the case. In our experience, we have found that the students manage quite well to understand this.

- Explain the students' tasks in a clear non-ambiguous way. Establish the fact that you might change these tasks as you see fit during the course of the session. From our experience, students expect you to be the leader, if not an autocratic leader, and they are not very sure of the teaching method used.

- Students are supposed to have read the case. Give students time to present what they consider to be the main issues in this case study. Try to group these issues according to the different opinions or positions expressed by the students and also according to certain sections of the case.

- Proceed with the identification of the main issues of the case in its sections. You may want to break up the different sections and handle them as a project on their own. If you decide to break the group, as homework, we have found that giving the students the task to write up their views (one page) has worked very well.

- Group formation, in this case, may be according to interest groups and then according to different interest groups as the case progresses. Our experience shows that students may change sides during the discussions and be very vocal about one line of thought and then another. Try to form students into groups of not more than 6 and discuss the various issues. (You may find it useful to use the guidelines as suggested in Appendix 2 (Appendix 11 in this study). You may want to break up the case analysis suggestions and only do a certain part, e.g. doing only the problem identification part initially and then doing the SWOT analysis at a later stage.)

- Allow the groups to report back and encourage debate.

- Do not summarise the case; give a summary of what has been done for the session and ask the students to write down what they think are the main issues of the case or a summary of the case. This they have to do strictly on one page (hand-written) and have to submit the following day. Where relevant, give further reading references on the topic.

- Issue a case evaluation form (Appendix 1) (Appendix 8 in this study) and ask the students to fill this in and return it to you before the end of the period or day. While the case may not be relevant to IBS per se, evaluating the case will introduce students to case evaluation.
At the end of the session, record your second impressions of the class and try to reconcile these with your first stated objectives and learning outcomes. This will act as your first assessment of how the students participate in class.

It is advisable to give a report back during the next session. What you would have achieved is getting to know your class better. This case may be used to identify any information gap. You may want to write another short case study to ‘fix’ those gaps or may decide to move to the next case.
Comparative distribution of matriculation points for 'our' and 'other' students.

Appendix 16
Comparative distribution 'our' and 'other' students' grades in Commercial Law 1A 1997 by matriculation points

<table>
<thead>
<tr>
<th>Matriculation Points</th>
<th>'our'</th>
<th>'other'</th>
</tr>
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<tbody>
<tr>
<td>&lt; 32</td>
<td>10</td>
<td>146</td>
</tr>
<tr>
<td>33 - 35</td>
<td>12</td>
<td>144</td>
</tr>
<tr>
<td>36 - 39</td>
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<td>157</td>
</tr>
<tr>
<td>40 - 43</td>
<td>6</td>
<td>92</td>
</tr>
<tr>
<td>&gt; 44</td>
<td>2</td>
<td>44</td>
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FIRST SECOND THIRD FAIL

Appendix 17
Appendix 18

Aradhna Arbee
EMS Programme
Faculty of Management Studies
University of Natal
Durban

Dear Aradhna

External Examiner’s report for Integrated Business Studies

Thank you very much for affording me the opportunity to be the external examiner for Integrated Business Studies once again. I am extremely impressed with the careful way in which you have set out the relevant information for the external examiner. It indicates a high degree of care taken over all aspects of the course, and on this you should be complimented.

As I noted last year, my impression is that the learning outcomes and types of assessment used seem entirely appropriate for a module of this nature. I am impressed (especially on viewing the video) with how far students have come in one semester, especially as this is now work in addition to their normal load, and with reduced contact hours.

I thought the development of students from the first assignment to the project was quite evident. While I initially thought that the marks awarded for the first assignment (on the new Act) appeared to be quite high, on reflection, given the weighting of that mark, students’ unfamiliarity with what’s required at that stage, and the need to encourage students early on, I think this is quite wise.

I am pleased that you have concentrated on the Mabusela case study. It is well written, interesting, and offers up a wealth of possibilities for comment. I noted in the student evaluation (which was itself very thorough and useful), that they found they had learned a lot from this particular case study.

I am also pleased to note that despite your current time limitations, you have managed to retain both the project and the group business proposals. As before, I found your assessments to be thorough, accurate and helpful, with very well organised assessment rubrics. In my opinion, none of the marks I have seen need to be changed. One concern, though, is that despite the information you have provided your students on properly integrating sources into their writing, few seem to manage that adequately. Your own comments allude to this quite often. I’m not sure how this can be overcome. Perhaps
some practice exercises in class? It's a tough problem, but the sooner students learn to master this skill, the better for them.

I enjoyed seeing students (in the video) integrating their skills and applying them to their (quite ambitious) business proposal. Best of all, they seemed to be enjoying themselves. Most came across as confident and articulate, and that must be seen as a tribute to a course co-ordinator who clearly has given them the space and the tools to develop appropriately. Some were indeed really impressive. This made me wonder if you keep track of the careers of your past students? It would be really interesting to know how they have fared in the wider world.

In conclusion, well done for keeping up the standard even with reduced contact time. Your new curriculum seems more compact and perhaps more punchy than before, and the students are clearly deriving great benefit from this course.

Keep up the good work.

Yours sincerely

DENYSE WEBBSTOCK

Director, QPU
3.2 TEMPLATE FOR THE INTERNAL APPROVAL OF MODULES AT THE UNIVERSITY OF NATAL (Draft)

A. ACADEMIC QUALITY OF THE MODULE

1. Title of module: Integrated Business Studies
2. Module code: DEX1 IB1
3. NQF level: Level 6
4. Credit value of the module: 16 points
5. Field / sub-field: Commerce, Finance, Economics, and Management Discipline: Inter-disciplinary within above.
6. School offering the module: Enriched Management Studies (EMS) Programme (Programme, not school)
7. Programme(s) on which the module will be offered: All B Bus Sci programmes (excluding B Bus Sci Actuarial Science); All B Com programmes (from 2004)
8. 8.1 Date of submission (to Faculty Board): June 2002
    8.2 Date of 1st offering: February 2003
    8.3 Date of evaluation and review: August 2003
9. Purpose of the module:

This course provides a first semester core course in business knowledge that integrates knowledge of the subjects students study in a B Com/ B Sci degree with wider competencies in written and spoken communication.

To introduce students, from the beginning of their university careers, to the real-life implications and complexities of the subjects they are learning theoretically.

To provide a vehicle for students to be involved in intensive group-work, in which they will gain skills of negotiation, presentation, communication and problem-solving.
It therefore specifically addresses the need expressed by employers in industry for graduates who are able to ground theory in current practice, who communicate well, who have competence in problem solving, and who are alert to current issues.

This course thus deals with the basic as well as complex challenges required to be a self-motivated student, a concerned citizen, and an effective businessman/ woman. It provides first-year students with the basic competencies required to successfully navigate life in the university, workplace and in public life.

**Statement of specific learning outcomes for the module:**

The outcomes are considered in relation to knowledge, skills and attitudes as set out below:

**Knowledge:** Learners will:

1. develop an understanding of the inter-disciplinary nature of knowledge particularly in the field of Business Studies;
2. acquire learning and discourse skills, a functional academic vocabulary, and knowledge of key concepts allowing them to engage effectively with disciplines within the Management Studies field;
3. establish the ground rules for good written and spoken English, and for well-argued written responses to questions;
4. become familiar with established conventions for academic writing, including writing assignments, proper referencing techniques, analysing question requirements, proof-reading and editing.

**Skills:** Learners will

5. be challenged to think critically about current issues (business, the environment, macroeconomics, globalisation, etc.) and will consider how and why rules, ideas or practices arise and come to be accepted;
6. develop their ability to think, write and make presentations in ways which are coherent, balanced and non-emotive;
7. develop their ability to write clearly and persuasively; and to organise and present ideas effectively in written form;
8. understand and identify texts written in different contexts and for different audiences; develop the skill of distinguishing between different registers and the ability to adapt their own styles of writing to the requirements of different situations and audiences; be led to appreciate the complex multifaceted nature of language and its potential to influence, manipulate, empower and disempower;
9. develop the ability to speak with confidence, logically and with precision in presenting ideas;
10. learn basic competencies: how to read a graph/table, find learning resources, and speak in public;
11. develop appropriate academic skills, including research, academic reading and writing skills, critical / analytical thinking, summarising and synthesising information;
12. develop basic research skills: the ability to collect, organise, evaluate and represent information in ways which are efficient as well as effective, given stated goals.

**Attitudes**: Learners will
13. be encouraged to develop skills and attitudes valued in the community and in the world of work, including self confidence, willingness to take initiative and assume leadership roles when required, and also to work collaboratively and co-operatively with others;
14. become aware of issues of social justice and the role professionals can play in promoting these, and of ways of optimising individual potential in the world of business and finance, without sacrificing social justice.

11. **List of content topics:**

The content involves the integration of business disciplines. It therefore draws on the following:
- principles and concepts within Economics;
- principles and concepts within Accounting and Finance;
- the nature and importance of technology in a business setting
- business ethics;
- topical issues as they impinge upon business.

In conformity with current education policy, the course favours competency-based, experiential learning. It concentrates upon establishing a basic understanding of business issues, together with critical skills and linguistic competence that will be further developed within Economics 1B; Economics 2A and Economics 2B.

12. **Types of delivery and estimated notional study hours per type:**

<table>
<thead>
<tr>
<th>Student activity</th>
<th>Number of notional study hours (for the whole module)</th>
</tr>
</thead>
</table>
| Lectures (interactive)| 19.5  
(2 x .75 x 13)       |
| Practicals:           |                                                        |
| Tutorials:            | 19.5  
(2 x .75 x 13)       |
| Field-trips:          | -                                                      |
| Placements:           | -                                                      |
Tests/exams:
Continuous assessment (2 hr exam for students attaining 40%-49%). Tutorial tests of 15 mins per week are included within tutorial times.

Other (specify):
Sub-total : No. of contact hours 39

Resource-based learning (project):
Self-directed study: 65 (5 x 13)
Study on assignments: Included within self-directed, guided, study above
Exam / tests preparation: included within self-directed, guided, study above

Other (specify):
Course evaluation - interviews: .75
- questionnaires .75

Sub-total : No. of notional self-study hours: 66.5

Total : No. of notional study hours required to complete the module: 39 + 65 + 1.5 = 105.5

13. Teaching-learning methods used on the module:
- interactive lectures;
- tutorials in which students 'brainstorm' and work in small groups so as to develop their ability to work in teams, to think creatively and critically, to defend their views, to appreciate, question and challenge other points of view thereby broadening their own understandings;
- Encouragement of enterprise and entrepreneurship skills through engaging with real-life problems and seeing the whole picture in its complexity;
- independent study through project work and journal writing for development of research and written communication skills;
- Oral presentation of research projects (particularly the business proposal) for the development of oral communication skills, including technology aided visual presentation.
14. **Statement of assessment criteria:**

Learners will demonstrate:

- their interdisciplinary understandings by effectively drawing on disciplinary knowledge from Accounting, Economics and Information Systems Technology and relevant articles in the financial press to express coherent, well-structured opinions (tutorial tests, journals);
- research skills by producing work containing evidence of independently acquired knowledge, including appropriate sourcing of this knowledge (projects);
- writing skills through the construction of clear, well-structured and coherently expressed arguments, (research project and 'e-journals'). ['E-journals' will involve continuous weekly contact between individual students and their tutors through e-mail. Students will comment on current business and other issues gleaned from their reading of the financial press; on their prescribed readings and recommended books; and on the progress of their studies and their feelings about the course];
- critical / analytical thinking through work revealing the students' ability to enquire into the assumptions that underlie the different disciplines and different perspectives within those disciplines, and an ability to draw conclusions, in relation to real-world problems (tutorial tests, e-journals);
- summarising skills by expressing in their own words key ideas in business studies, (tutorial tests, e-journals);
- synthesising skills by showing they can draw on a number of sources of information to construct their own arguments, (tutorial tests, e-journals and research project);
- self-confidence by their willingness to offer opinions and ask questions even when this involves risk-taking behaviour, and by being prepared to offer an opinion when called on to do so, (tutorials, e-journals);
- the ability to work collaboratively and co-operatively by showing a willingness to share ideas and workloads, meeting commitments agreed to by the group, the delivery of undertakings, taking turns to listen and speak, (business proposal);
- presentation skills by the use of legible, clear visual aids, speaking audibly, making eye contact with the audience, adopting an appropriate pace and presenting a coherent message, while adhering to time limits. (business proposal);
- evidence of the ability to understand and use technical and sub-technical vocabulary in context (glossary);
- the ability to organise information and notes in such a way as to form a useful working resource (portfolio).
15. Methods of assessment to be used in the module (indicate the weighting for each method):

The course will be based on continuous assessment i.e., individual students will be assessed on an ongoing basis throughout the course using multiple assessment instruments to gauge student competence in different performance contexts: tutorial tests, e-journal, the assignment, the Business Proposal and their portfolio of accumulated work. Students will be given the opportunity, where appropriate, to improve on an initial mark.

The proposed assessment tasks and weighting for the 13 week module is as follows:

<table>
<thead>
<tr>
<th>NUMBER</th>
<th>WEIGHTING</th>
</tr>
</thead>
<tbody>
<tr>
<td>TESTS</td>
<td>8</td>
</tr>
<tr>
<td>ASSIGNMENTS (researched)</td>
<td>1</td>
</tr>
<tr>
<td>CLASSWORK (E-journals)</td>
<td>10</td>
</tr>
<tr>
<td>Portfolios</td>
<td>1</td>
</tr>
<tr>
<td>RESEARCH PROJECT (Business Proposal)</td>
<td>1</td>
</tr>
</tbody>
</table>

PARTICIPATION (included in class work and research project above)

It should be emphasised that the above assessment format requires that students attend all classes; students will have to be present to benefit from the activities and the teaching-learning process as it unfolds in the course of a particular lecture. Guest lecturers provide important input.

Students will be expected to keep individual portfolios of their work. Assessment will be incremental, continuous, and formative, and tasks will be set which demand a range of skills to be demonstrated within different assessment contexts involving: self-assessment; peer assessment; group assessment; presentations; a researched essay; formal and open-book tests.

Quality will be assured by a system of on-going internal moderation and also by external examination of students' portfolios of work at the end of the module.
16. What educational provision is made in the module to support students from diverse/disadvantaged backgrounds?

The course is based on an understanding that all students entering a B Com degree need to master the skills and understandings involved in the diverse, multilingual and multicultural current South African business and community environment. The individualised nature of the teaching and learning situation will allow for appropriate support in response to diversity and language skills.

B FEASIBILITY OF THE MODULE
(Until the new subsidy formula is established, this section will be based on the SAPSE subsidy formula)

1. What is the average number of students registered for this module over the past 3 years?
   35

Since 1997, the module in a limited form has been offered to Enriched Management Studies (EMS) students only. In its updated form it will accommodate all first-year B Bus Sci and all EMS B Com students in 2003. It will accommodate all first-year B Com and Bus Sci (except Actuarial Science) students in 2004 – that is, over 600 students and, following the merger with UDW, 1000-1500 students.

2. What is the average student through-put rate for this module over the past 2 years?
   100%

   What is the current subsidy granted per FTE on this module?
   ?

4. What is the current UN fee charged per student on this module (excluding registration fees)?
   R990

5. What is the projected annual income from offering this module?
   (The module may be offered more than once per annum)
   R600,000
6. What are the teaching staff requirements to run this module? To help estimate staffing costs, please indicate the number of notional teaching hours required at each rank.

(Indicate numbers of staff members by rank and notional teaching hours (n.t. hrs.) at each rank for the whole module) [NB this will apply to the year 2003 only]

<table>
<thead>
<tr>
<th>Rank</th>
<th>N.t.hrs on this module</th>
</tr>
</thead>
<tbody>
<tr>
<td>Professor</td>
<td>0</td>
</tr>
<tr>
<td>Associate Professor</td>
<td>0</td>
</tr>
<tr>
<td>Senior Lecturer (and guest lecturers)</td>
<td>39 (4 x .75 x 13)</td>
</tr>
<tr>
<td>Lecturer</td>
<td></td>
</tr>
<tr>
<td>Tutors</td>
<td>292.5 (3.75 x 6 x 13)</td>
</tr>
<tr>
<td>Laboratory Technician</td>
<td></td>
</tr>
<tr>
<td>Other (specify)</td>
<td></td>
</tr>
<tr>
<td>Total no. of notional teaching hrs.</td>
<td>331.5</td>
</tr>
</tbody>
</table>

7. What non-academic staffing requirements are there - technical staff, administrative staff, etc. (Estimate number of notional hours spent on this module)

<table>
<thead>
<tr>
<th>Type of Support Staff</th>
<th>N. hrs. on this module</th>
</tr>
</thead>
<tbody>
<tr>
<td>Total number of support hours required:</td>
<td>260</td>
</tr>
<tr>
<td></td>
<td>(Average 10 hrs x 13 x2)</td>
</tr>
</tbody>
</table>

8.1 Is the module offered on a self-funded basis?

No

8.2 If yes, what number of the total number of notional teaching hours (estimated in No. 6 above) are paid for from self-funding sources?

8.3 If yes, what number of the total number of notional support staff hours (estimated in No. 7 above) are paid for from self-funding sources?

9. If the module is not (yet) financially viable, what particular academic/contextual merit does it offer which might justify its cross-subsidisation by the University?

It should enhance the Faculty's ability to attract excellent students. It should meet the demands of academic staff for students who are capable learners and thinkers, and of business for graduates who are good communicators and strategic thinkers, aware of the wider business context. It should also help
meet government aims to "redress past inequalities, to serve a new social order, to meet pressing national needs and to respond to new realities and opportunities" (White Paper 3 - a Programme for the Transformation of Higher Education, July 1997).

10. Venues and time-tableing:
What venues will be required to run the module? [NB This is only applicable to 2003]

<table>
<thead>
<tr>
<th>Venues</th>
<th>Number required</th>
<th>No. of periods per week (Actually)</th>
</tr>
</thead>
<tbody>
<tr>
<td>(Ideally)</td>
<td></td>
<td></td>
</tr>
<tr>
<td>school seminar/tutorial room</td>
<td>6</td>
<td>2</td>
</tr>
<tr>
<td>school laboratory</td>
<td></td>
<td></td>
</tr>
<tr>
<td>university lecture theatre</td>
<td>1</td>
<td>2</td>
</tr>
<tr>
<td>university laboratory</td>
<td></td>
<td></td>
</tr>
<tr>
<td>university computer work stations</td>
<td>?</td>
<td>?</td>
</tr>
<tr>
<td>school office accommodation</td>
<td></td>
<td></td>
</tr>
<tr>
<td>other (specify)</td>
<td></td>
<td></td>
</tr>
<tr>
<td>access to a meeting venue</td>
<td></td>
<td></td>
</tr>
<tr>
<td>(EMS seminar room)</td>
<td>1</td>
<td></td>
</tr>
</tbody>
</table>

For new modules only:

11. What are the additional resource costs of mounting this module?

[????]

11.1 library
11.2 materials development and reproduction
11.3 laboratory
11.4 computers
11.5 travel
11.6 other (specify)

Total

12. Is additional funding (seed money) required over the next three years to make the module financially viable? (If yes, state the amount of additional funding required)

[????]
Academic staff member responsible for this module:

Senior Lecturer

Name: Caroline Goodier

Signed:

Date:

Programme Director:    Head of School: (see below)

Name: Janet Hesketh    Name:

Signed:    Signed:

Date:    Date:
Bridging Unit
c/o Janet Hesketh

Dear Madam

EVALUATION OF BRIDGING UNIT

Firstly, I would like to thank you for being part of this and gave me so much empowerment. I got into Bridging by luck and thank God for that.

When I got here in 1990, I was a shy person with abilities, leadership, skills etc, but who could not prove and show them. Since 1990 you made me proud of myself. You made me realize my potentials, made me to be bold in facing situations and improved my intelligence.

I am now in a position to face the challenges of the World. Today I am one of the important figures in the leadership environment of this campus. I can now stand for myself or other people before others, both Black and White. I've shown the improvement in communication skills in various vacation employments and interviews. I really bridged the gap and you, especially, Janet, really influenced my career positively and gave me a gift for life.

What you gave me empowered me with both Academic and Non-Academic support. I also believe that I'm not the only one. Around the campus, Ex-Bridging students are one of the few Blacks that are doing the best Academically and also in most leadership positions. Obviously, you could not give all, but You gave your Best.

For your future students, I would suggest that, other than the Academic support you should also highly aim at making feel Bold/Confident, Proud of themselves and give them Career Guidance. I believe that would make them search themselves and determine their potentials and weaknesses. As a result, they could be Goal-oriented and Self-motivated.

With all appreciation, Thank You and Good Luck.

Yours sincerely
Appendix 21

Improved Performance of 'our' Students Relative to 'others'

Comparative Distribution of Examination Grades in Accounting 3, Auditing 3 and Managerial Accounting & Finance 3 in 1999/2000 and 2002

Categories of Results

- 1st Class
- 2nd Class
- 3rd Class
- Fail

% Distribution
- 60%
- 50%
- 40%
- 30%
- 20%
- 10%
- 0%

'our' students (1999-2000)
'other' students (1999-2000)
'our' students (2002)
'other' students (2002)
Appendix 22

Demographic Changes of Students and Staff across our Campus and in our Faculty: 1989 – 2002

Between 1989, when the programme central to this study was launched, and 2002, the University saw rapid growth in student numbers and a changing demographic profile. In a context of diminishing state funding it was faced with increasing numbers of students and of a new cultural mix. This brought some challenges in terms of teaching larger classes of students of different backgrounds, university-preparedness and facility with the English language.

The following table depicts the total number of full-time students and academic staff on the Durban campus in 1989, when the programme started, to 1997, the year of focus in the case study, to 2002 when this work was being completed. It includes figures for the Faculty of Management Studies but excludes the exponential growth of part-time and distance-learning students, which brought the faculty’s total number of students in 2002 to 7200. These figures demonstrate the increasing pressure under which academics worked, particularly after 1997, as a background to the discussion in Chapter Ten about academics’ reluctance to engage in curriculum reform projects.

Table 9: Full-time Student and Staff Numbers for the Durban Campus and Faculty of Management Studies: 1989-2002

<table>
<thead>
<tr>
<th></th>
<th>1989 students</th>
<th>1989 staff</th>
<th>1997 students</th>
<th>1997 staff</th>
<th>2002 students</th>
<th>2002 staff</th>
</tr>
</thead>
<tbody>
<tr>
<td>Durban Campus</td>
<td>7706</td>
<td>356</td>
<td>10215</td>
<td>411</td>
<td>17350</td>
<td>392</td>
</tr>
<tr>
<td>Management</td>
<td>1510</td>
<td>38</td>
<td>1970</td>
<td>54</td>
<td>3571</td>
<td>57</td>
</tr>
</tbody>
</table>

This period of transformation thus saw steep increases in student numbers, without a corresponding increase in staff. It represents a declining academic staff to student ratio from 1:39.7 in 1989 to 1:36.5 in 1997 to 1:62.7 in 2002. Impacting on their teaching experience were the changing percentages of Black African students from 1989 relative to first language English speakers represented by ‘Indians’, ‘Whites’ and to a lesser degree, ‘Coloureds’ in the table below. (The information for both tables was provided by the University’s Statistics office and Human Resources Department)

Table 10: Comparative percentages of African, Indian ‘Coloured’ and White full-time Management Studies students: 1989-2002

<table>
<thead>
<tr>
<th></th>
<th>1989</th>
<th>1997</th>
<th>2002</th>
</tr>
</thead>
<tbody>
<tr>
<td>Black African</td>
<td>5,4%</td>
<td>29,6%</td>
<td>24,0%</td>
</tr>
<tr>
<td>Indian</td>
<td>15,1%</td>
<td>50,3%</td>
<td>56,8%</td>
</tr>
<tr>
<td>‘Coloured’</td>
<td>1,5%</td>
<td>2,4%</td>
<td>2,3%</td>
</tr>
<tr>
<td>White</td>
<td>78%</td>
<td>16,7%</td>
<td>16,9%</td>
</tr>
</tbody>
</table>
Level 1 Combined Examination Marks Compared: 1997

<table>
<thead>
<tr>
<th></th>
<th>&quot;Our&quot; Students</th>
<th>&quot;Other&quot; Students</th>
</tr>
</thead>
<tbody>
<tr>
<td>1st Class Pass</td>
<td>64</td>
<td>797</td>
</tr>
<tr>
<td>2nd Class Pass</td>
<td>74</td>
<td>446</td>
</tr>
<tr>
<td>3rd Class Pass</td>
<td>53</td>
<td>2935</td>
</tr>
<tr>
<td>Fail</td>
<td>10</td>
<td>1183</td>
</tr>
</tbody>
</table>

As Percentages

<table>
<thead>
<tr>
<th></th>
<th>&quot;Our&quot; Students</th>
<th>&quot;Other&quot; Students</th>
</tr>
</thead>
<tbody>
<tr>
<td>1st Class Pass</td>
<td>32%</td>
<td>15%</td>
</tr>
<tr>
<td>2nd Class Pass</td>
<td>37%</td>
<td>8%</td>
</tr>
<tr>
<td>3rd Class Pass</td>
<td>26%</td>
<td>55%</td>
</tr>
<tr>
<td>Fail</td>
<td>5%</td>
<td>22%</td>
</tr>
</tbody>
</table>

Expected Values (Under Null Hypothesis)

<table>
<thead>
<tr>
<th></th>
<th>&quot;Our&quot; Students</th>
<th>&quot;Other&quot; Students</th>
</tr>
</thead>
<tbody>
<tr>
<td>1st Class Pass</td>
<td>31</td>
<td>830</td>
</tr>
<tr>
<td>2nd Class Pass</td>
<td>19</td>
<td>501</td>
</tr>
<tr>
<td>3rd Class Pass</td>
<td>108</td>
<td>2880</td>
</tr>
<tr>
<td>Fail</td>
<td>43</td>
<td>1150</td>
</tr>
</tbody>
</table>

\[
\sum_{i} \frac{(O_{ij} - E_{ij})^2}{E_{ij}} = 34.756 + 162.195 = 259.766 \ (p<0.0001)
\]
# Level 1 Combined Examination Marks Compared: 1998

<table>
<thead>
<tr>
<th></th>
<th>&quot;Our&quot; Students</th>
<th>&quot;Other&quot; Students</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>1st Class Pass</strong></td>
<td>67</td>
<td>487</td>
</tr>
<tr>
<td><strong>2nd Class Pass</strong></td>
<td>157</td>
<td>1244</td>
</tr>
<tr>
<td><strong>3rd Class Pass</strong></td>
<td>77</td>
<td>1677</td>
</tr>
<tr>
<td><strong>Fail</strong></td>
<td>19</td>
<td>2001</td>
</tr>
</tbody>
</table>

## As Percentages

<table>
<thead>
<tr>
<th></th>
<th>&quot;Our&quot; Students</th>
<th>&quot;Other&quot; Students</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>1st Class Pass</strong></td>
<td>21%</td>
<td>9%</td>
</tr>
<tr>
<td><strong>2nd Class Pass</strong></td>
<td>49%</td>
<td>23%</td>
</tr>
<tr>
<td><strong>3rd Class Pass</strong></td>
<td>24%</td>
<td>31%</td>
</tr>
<tr>
<td><strong>Fail</strong></td>
<td>6%</td>
<td>37%</td>
</tr>
</tbody>
</table>

## Expected Values (Under Null Hypothesis)

<table>
<thead>
<tr>
<th></th>
<th>&quot;Our&quot; Students</th>
<th>&quot;Other&quot; Students</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>1st Class Pass</strong></td>
<td>31</td>
<td>523</td>
</tr>
<tr>
<td><strong>2nd Class Pass</strong></td>
<td>78</td>
<td>1323</td>
</tr>
<tr>
<td><strong>3rd Class Pass</strong></td>
<td>98</td>
<td>1656</td>
</tr>
<tr>
<td><strong>Fail</strong></td>
<td>113</td>
<td>1907</td>
</tr>
</tbody>
</table>

\[
\Sigma (O_i - E_i)^2 = \begin{array}{l}
42.050 \\
4.485 \\
2.488 \\
0.265 \\
\end{array} + \begin{array}{l}
79.228 \\
78.047 \\
4.687 \\
4.617 \\
\end{array} = 215.867 \quad (p<0.0001)
\]
### Level 1 Combined Examination Marks Compared: 1999

#### Observed Values

<table>
<thead>
<tr>
<th></th>
<th>&quot;Our&quot; Students</th>
<th>&quot;Other&quot; Students</th>
</tr>
</thead>
<tbody>
<tr>
<td>1st Class Pass</td>
<td>23</td>
<td>718</td>
</tr>
<tr>
<td>2nd Class Pass</td>
<td>41</td>
<td>1762</td>
</tr>
<tr>
<td>3rd Class Pass</td>
<td>27</td>
<td>2480</td>
</tr>
<tr>
<td>Fail</td>
<td>9</td>
<td>1566</td>
</tr>
</tbody>
</table>

#### As Percentages

<table>
<thead>
<tr>
<th></th>
<th>&quot;Our&quot; Students</th>
<th>&quot;Other&quot; Students</th>
</tr>
</thead>
<tbody>
<tr>
<td>1st Class Pass</td>
<td>23%</td>
<td>11%</td>
</tr>
<tr>
<td>2nd Class Pass</td>
<td>41%</td>
<td>27%</td>
</tr>
<tr>
<td>3rd Class Pass</td>
<td>27%</td>
<td>38%</td>
</tr>
<tr>
<td>Fail</td>
<td>9%</td>
<td>24%</td>
</tr>
</tbody>
</table>

#### Expected Values (Under Null Hypothesis)

<table>
<thead>
<tr>
<th></th>
<th>&quot;Our&quot; Students</th>
<th>&quot;Other&quot; Students</th>
</tr>
</thead>
<tbody>
<tr>
<td>1st Class Pass</td>
<td>11</td>
<td>730</td>
</tr>
<tr>
<td>2nd Class Pass</td>
<td>27</td>
<td>1776</td>
</tr>
<tr>
<td>3rd Class Pass</td>
<td>38</td>
<td>2469</td>
</tr>
<tr>
<td>Fail</td>
<td>24</td>
<td>1551</td>
</tr>
</tbody>
</table>

\[
\sum (O_{ij} - E_{ij})^2 = 12.493 + 6.987 = 32.250 \quad (p<0.001)
\]
### Level 1 Combined Examination Marks Compared: 2000

#### Observed Values

<table>
<thead>
<tr>
<th></th>
<th>&quot;Our&quot; Students</th>
<th>&quot;Other&quot; Students</th>
</tr>
</thead>
<tbody>
<tr>
<td>1st Class Pass</td>
<td>88</td>
<td>827</td>
</tr>
<tr>
<td>2nd Class Pass</td>
<td>149</td>
<td>1654</td>
</tr>
<tr>
<td>3rd Class Pass</td>
<td>81</td>
<td>2482</td>
</tr>
<tr>
<td>Fail</td>
<td>29</td>
<td>1400</td>
</tr>
</tbody>
</table>

#### As Percentages

<table>
<thead>
<tr>
<th></th>
<th>&quot;Our&quot; Students</th>
<th>&quot;Other&quot; Students</th>
</tr>
</thead>
<tbody>
<tr>
<td>1st Class Pass</td>
<td>25%</td>
<td>13%</td>
</tr>
<tr>
<td>2nd Class Pass</td>
<td>43%</td>
<td>26%</td>
</tr>
<tr>
<td>3rd Class Pass</td>
<td>23%</td>
<td>39%</td>
</tr>
<tr>
<td>Fail</td>
<td>8%</td>
<td>22%</td>
</tr>
</tbody>
</table>

#### Expected Values (Under Null Hypothesis)

<table>
<thead>
<tr>
<th></th>
<th>&quot;Our&quot; Students</th>
<th>&quot;Other&quot; Students</th>
</tr>
</thead>
<tbody>
<tr>
<td>1st Class Pass</td>
<td>47</td>
<td>868</td>
</tr>
<tr>
<td>2nd Class Pass</td>
<td>93</td>
<td>1710</td>
</tr>
<tr>
<td>3rd Class Pass</td>
<td>133</td>
<td>2430</td>
</tr>
<tr>
<td>Fail</td>
<td>74</td>
<td>1355</td>
</tr>
</tbody>
</table>

\[
\sum (O_{ij} - E_{ij})^2 = 34.952 + 33.315 = 121.873 \quad (p<0.0001)
\]
# Level 1 Combined Examination Marks Compared: 2001

## Observed Values

<table>
<thead>
<tr>
<th></th>
<th>&quot;Our&quot; Students</th>
<th>&quot;Other&quot; Students</th>
</tr>
</thead>
<tbody>
<tr>
<td>1st Class Pass</td>
<td>53</td>
<td>889</td>
</tr>
<tr>
<td>2nd Class Pass</td>
<td>141</td>
<td>2234</td>
</tr>
<tr>
<td>3rd Class Pass</td>
<td>88</td>
<td>2670</td>
</tr>
<tr>
<td>Fail</td>
<td>13</td>
<td>970</td>
</tr>
</tbody>
</table>

## As Percentages

<table>
<thead>
<tr>
<th></th>
<th>&quot;Our&quot; Students</th>
<th>&quot;Other&quot; Students</th>
</tr>
</thead>
<tbody>
<tr>
<td>1st Class Pass</td>
<td>18%</td>
<td>13%</td>
</tr>
<tr>
<td>2nd Class Pass</td>
<td>48%</td>
<td>33%</td>
</tr>
<tr>
<td>3rd Class Pass</td>
<td>30%</td>
<td>39%</td>
</tr>
<tr>
<td>Fail</td>
<td>4%</td>
<td>14%</td>
</tr>
</tbody>
</table>

## Expected Values (Under Null Hypothesis)

<table>
<thead>
<tr>
<th></th>
<th>&quot;Our&quot; Students</th>
<th>&quot;Other&quot; Students</th>
</tr>
</thead>
<tbody>
<tr>
<td>1st Class Pass</td>
<td>39</td>
<td>902</td>
</tr>
<tr>
<td>2nd Class Pass</td>
<td>99</td>
<td>2276</td>
</tr>
<tr>
<td>3rd Class Pass</td>
<td>115</td>
<td>2642</td>
</tr>
<tr>
<td>Fail</td>
<td>41</td>
<td>942</td>
</tr>
</tbody>
</table>

\[
\sum \frac{(O_{ij} - E_{ij})^2}{E_{ij}} = 4.728 + 17.528 + 6.453 + 19.198 + 0.206 + 0.765 + 0.282 + 0.838 = 49.998 \quad (p<0.001)
\]
### Level 1 Combined Examination Marks Compared: 2002

#### Observed Values

<table>
<thead>
<tr>
<th></th>
<th>&quot;Our&quot; Students</th>
<th>&quot;Other&quot; Students</th>
</tr>
</thead>
<tbody>
<tr>
<td>1st Class Pass</td>
<td>191</td>
<td>917</td>
</tr>
<tr>
<td>2nd Class Pass</td>
<td>225</td>
<td>1705</td>
</tr>
<tr>
<td>3rd Class Pass</td>
<td>163</td>
<td>2349</td>
</tr>
<tr>
<td>Fail</td>
<td>54</td>
<td>2238</td>
</tr>
</tbody>
</table>

#### As Percentages

<table>
<thead>
<tr>
<th></th>
<th>&quot;Our&quot; Students</th>
<th>&quot;Other&quot; Students</th>
</tr>
</thead>
<tbody>
<tr>
<td>1st Class Pass</td>
<td>30%</td>
<td>13%</td>
</tr>
<tr>
<td>2nd Class Pass</td>
<td>36%</td>
<td>24%</td>
</tr>
<tr>
<td>3rd Class Pass</td>
<td>26%</td>
<td>33%</td>
</tr>
<tr>
<td>Fail</td>
<td>9%</td>
<td>31%</td>
</tr>
</tbody>
</table>

#### Expected Values (Under Null Hypothesis)

<table>
<thead>
<tr>
<th></th>
<th>&quot;Our&quot; Students</th>
<th>&quot;Other&quot; Students</th>
</tr>
</thead>
<tbody>
<tr>
<td>1st Class Pass</td>
<td>89</td>
<td>1019</td>
</tr>
<tr>
<td>2nd Class Pass</td>
<td>156</td>
<td>1774</td>
</tr>
<tr>
<td>3rd Class Pass</td>
<td>203</td>
<td>2309</td>
</tr>
<tr>
<td>Fail</td>
<td>185</td>
<td>2107</td>
</tr>
</tbody>
</table>

\[
\sum (O_{ij} - E_{ij})^2 = 115.333 + 30.749 + 7.799 + 92.770 + 10.127 + 2.700 + 0.685 + 8.146 = 268.309 \quad (p<0.0001)
\]
Level 1 Combined Examination Marks for 'our' 'disadvantaged' group and 'other' Students Compared: 2002

<table>
<thead>
<tr>
<th></th>
<th>&quot;Our&quot; Disadvantaged Students</th>
<th>&quot;Other&quot; Students</th>
</tr>
</thead>
<tbody>
<tr>
<td>1st Class Pass</td>
<td>34</td>
<td>797</td>
</tr>
<tr>
<td>2nd Class Pass</td>
<td>46</td>
<td>446</td>
</tr>
<tr>
<td>3rd Class Pass</td>
<td>37</td>
<td>2935</td>
</tr>
<tr>
<td>Fail</td>
<td>10</td>
<td>1183</td>
</tr>
</tbody>
</table>

As Percentages

<table>
<thead>
<tr>
<th></th>
<th>&quot;Our&quot; Disadvantaged Students</th>
<th>&quot;Other&quot; Students</th>
</tr>
</thead>
<tbody>
<tr>
<td>1st Class Pass</td>
<td>27%</td>
<td>15%</td>
</tr>
<tr>
<td>2nd Class Pass</td>
<td>36%</td>
<td>8%</td>
</tr>
<tr>
<td>3rd Class Pass</td>
<td>29%</td>
<td>55%</td>
</tr>
<tr>
<td>Fail</td>
<td>8%</td>
<td>22%</td>
</tr>
</tbody>
</table>

Expected Values (Under Null Hypothesis)

<table>
<thead>
<tr>
<th></th>
<th>&quot;Our&quot; Students</th>
<th>&quot;Other&quot; Students</th>
</tr>
</thead>
<tbody>
<tr>
<td>1st Class Pass</td>
<td>19</td>
<td>812</td>
</tr>
<tr>
<td>2nd Class Pass</td>
<td>11</td>
<td>481</td>
</tr>
<tr>
<td>3rd Class Pass</td>
<td>69</td>
<td>2903</td>
</tr>
<tr>
<td>Fail</td>
<td>28</td>
<td>1165</td>
</tr>
</tbody>
</table>

\[
\sum (O_{ij} - E_{ij})^2 = 11.343 + 105.235
\]

\[
E_{ij} = 14.681 + 11.230
\]

\[
0.269 + 2.493
\]

\[
0.348 + 0.266
\]

\[
= 145.865 \quad (p<0.0001)
\]
## Dean's Commendations for 'our' and 'other' First-year Students Compared: 1997

### Observed Values

<table>
<thead>
<tr>
<th></th>
<th>&quot;Our&quot; Students</th>
<th>&quot;Other&quot; Students</th>
</tr>
</thead>
<tbody>
<tr>
<td>Dean's Recommendation</td>
<td>17</td>
<td>37</td>
</tr>
<tr>
<td>No Recommendation</td>
<td>32</td>
<td>513</td>
</tr>
</tbody>
</table>

### As Percentages

<table>
<thead>
<tr>
<th></th>
<th>&quot;Our&quot; Students</th>
<th>&quot;Other&quot; Students</th>
</tr>
</thead>
<tbody>
<tr>
<td>Dean's Recommendation</td>
<td>35%</td>
<td>7%</td>
</tr>
<tr>
<td>No Recommendation</td>
<td>65%</td>
<td>93%</td>
</tr>
</tbody>
</table>

### Expected Values (Under Null Hypothesis)

<table>
<thead>
<tr>
<th></th>
<th>&quot;Our&quot; Students</th>
<th>&quot;Other&quot; Students</th>
</tr>
</thead>
<tbody>
<tr>
<td>Dean's Recommendation</td>
<td>4</td>
<td>50</td>
</tr>
<tr>
<td>No Recommendation</td>
<td>45</td>
<td>500</td>
</tr>
</tbody>
</table>

\[
\sum (O_{ij} - E_{ij})^2 = 35.841 + 3.551
\]

\[
E_{ij} = 3.193 + 0.316
\]

\[
= 42.902 \quad (p<0.001)
\]
### Dean's Commendations for 'our' and 'other' First-year Students Compared: 2002

#### Observed Values

<table>
<thead>
<tr>
<th></th>
<th>&quot;Our&quot; Students</th>
<th>&quot;Other&quot; Students</th>
</tr>
</thead>
<tbody>
<tr>
<td>Dean's Recommendation</td>
<td>11</td>
<td>61</td>
</tr>
<tr>
<td>No Recommendation</td>
<td>23</td>
<td>779</td>
</tr>
</tbody>
</table>

#### As Percentages

<table>
<thead>
<tr>
<th></th>
<th>&quot;Our&quot; Students</th>
<th>&quot;Other&quot; Students</th>
</tr>
</thead>
<tbody>
<tr>
<td>Dean's Recommendation</td>
<td>32%</td>
<td>7%</td>
</tr>
<tr>
<td>No Recommendation</td>
<td>68%</td>
<td>93%</td>
</tr>
</tbody>
</table>

#### Expected Values (Under Null Hypothesis)

<table>
<thead>
<tr>
<th></th>
<th>&quot;Our&quot; Students</th>
<th>&quot;Other&quot; Students</th>
</tr>
</thead>
<tbody>
<tr>
<td>Dean's Recommendation</td>
<td>3</td>
<td>69</td>
</tr>
<tr>
<td>No Recommendation</td>
<td>31</td>
<td>771</td>
</tr>
</tbody>
</table>

\[
\sum (O_{ij} - E_{ij})^2 = 24.001 + 2.155
\]

\[
E_{ij} = 0.971 + 0.087
\]

\[
= 27.214 \quad (p<0.001)
\]
## Dean's Commendation for 'our' 'disadvantaged' group and 'other' First-year Students Compared: 2002

<table>
<thead>
<tr>
<th></th>
<th>&quot;Our&quot; Disadvantaged Students</th>
<th>&quot;Other&quot; Students</th>
</tr>
</thead>
<tbody>
<tr>
<td>Dean's Recommendation</td>
<td>4</td>
<td>61</td>
</tr>
<tr>
<td>No Recommendation</td>
<td>17</td>
<td>779</td>
</tr>
</tbody>
</table>

### As Percentages

<table>
<thead>
<tr>
<th></th>
<th>&quot;Our&quot; Disadvantaged Students</th>
<th>&quot;Other&quot; Students</th>
</tr>
</thead>
<tbody>
<tr>
<td>Dean's Recommendation</td>
<td>19%</td>
<td>7%</td>
</tr>
<tr>
<td>No Recommendation</td>
<td>81%</td>
<td>93%</td>
</tr>
</tbody>
</table>

### Expected Values (Under Null Hypothesis)

<table>
<thead>
<tr>
<th></th>
<th>&quot;Our&quot; Students</th>
<th>&quot;Other&quot; Students</th>
</tr>
</thead>
<tbody>
<tr>
<td>Dean's Recommendation</td>
<td>2</td>
<td>63</td>
</tr>
<tr>
<td>No Recommendation</td>
<td>19</td>
<td>777</td>
</tr>
</tbody>
</table>

\[ \sum (O_{ij} - E_{ij})^2 = 3.678 + 0.300 \]

\[ E_{ij} = 0.092 + 0.008 \]

\[ = 4.077 \quad (p<0.05) \]
### Level 2 Combined Examination Marks Compared: 1997 Cohort

#### Observed Values

<table>
<thead>
<tr>
<th></th>
<th>&quot;Our&quot; Students</th>
<th>&quot;Other&quot; Students</th>
</tr>
</thead>
<tbody>
<tr>
<td>1st Class Pass</td>
<td>14</td>
<td>84</td>
</tr>
<tr>
<td>2nd Class Pass</td>
<td>108</td>
<td>589</td>
</tr>
<tr>
<td>3rd Class Pass</td>
<td>153</td>
<td>1178</td>
</tr>
<tr>
<td>Fail</td>
<td>50</td>
<td>775</td>
</tr>
</tbody>
</table>

#### As Percentages

<table>
<thead>
<tr>
<th></th>
<th>&quot;Our&quot; Students</th>
<th>&quot;Other&quot; Students</th>
</tr>
</thead>
<tbody>
<tr>
<td>1st Class Pass</td>
<td>4%</td>
<td>3%</td>
</tr>
<tr>
<td>2nd Class Pass</td>
<td>33%</td>
<td>22%</td>
</tr>
<tr>
<td>3rd Class Pass</td>
<td>47%</td>
<td>45%</td>
</tr>
<tr>
<td>Fail</td>
<td>15%</td>
<td>30%</td>
</tr>
</tbody>
</table>

#### Expected Values (Under Null Hypothesis)

<table>
<thead>
<tr>
<th></th>
<th>&quot;Our&quot; Students</th>
<th>&quot;Other&quot; Students</th>
</tr>
</thead>
<tbody>
<tr>
<td>1st Class Pass</td>
<td>11</td>
<td>87</td>
</tr>
<tr>
<td>2nd Class Pass</td>
<td>77</td>
<td>620</td>
</tr>
<tr>
<td>3rd Class Pass</td>
<td>147</td>
<td>1184</td>
</tr>
<tr>
<td>Fail</td>
<td>91</td>
<td>734</td>
</tr>
</tbody>
</table>

\[ \Sigma \left( O_{ij} - E_{ij} \right)^2 = \frac{0.953}{E_{ij}} + 12.712 \]

\[ \Sigma \left( O_{ij} - E_{ij} \right)^2 = \frac{0.281}{E_{ij}} + 18.374 \]

\[ \Sigma \left( O_{ij} - E_{ij} \right)^2 = \frac{0.118}{E_{ij}} + 1.573 \]

\[ \Sigma \left( O_{ij} - E_{ij} \right)^2 = \frac{0.035}{E_{ij}} + 2.274 \]

\[ \Sigma \left( O_{ij} - E_{ij} \right)^2 = 36.320 \quad (p<0.001) \]
## Level 3 Combined Examination Marks Compared: 1997 Cohort

### Observed Values

<table>
<thead>
<tr>
<th></th>
<th>&quot;Our&quot; Students</th>
<th>&quot;Other&quot; Students</th>
</tr>
</thead>
<tbody>
<tr>
<td>1st Class Pass</td>
<td>4</td>
<td>127</td>
</tr>
<tr>
<td>2nd Class Pass</td>
<td>62</td>
<td>549</td>
</tr>
<tr>
<td>3rd Class Pass</td>
<td>144</td>
<td>1173</td>
</tr>
<tr>
<td>Fail</td>
<td>155</td>
<td>906</td>
</tr>
</tbody>
</table>

### As Percentages

<table>
<thead>
<tr>
<th></th>
<th>&quot;Our&quot; Students</th>
<th>&quot;Other&quot; Students</th>
</tr>
</thead>
<tbody>
<tr>
<td>1st Class Pass</td>
<td>1%</td>
<td>5%</td>
</tr>
<tr>
<td>2nd Class Pass</td>
<td>17%</td>
<td>20%</td>
</tr>
<tr>
<td>3rd Class Pass</td>
<td>39%</td>
<td>43%</td>
</tr>
<tr>
<td>Fail</td>
<td>42%</td>
<td>33%</td>
</tr>
</tbody>
</table>

### Expected Values (Under Null Hypothesis)

<table>
<thead>
<tr>
<th></th>
<th>&quot;Our&quot; Students</th>
<th>&quot;Other&quot; Students</th>
</tr>
</thead>
<tbody>
<tr>
<td>1st Class Pass</td>
<td>15</td>
<td>116</td>
</tr>
<tr>
<td>2nd Class Pass</td>
<td>71</td>
<td>540</td>
</tr>
<tr>
<td>3rd Class Pass</td>
<td>154</td>
<td>1163</td>
</tr>
<tr>
<td>Fail</td>
<td>124</td>
<td>937</td>
</tr>
</tbody>
</table>

\[
\sum (O_{ij} - E_{ij})^2 = 8.369 + 1.257 \\
E_{ij}
\]

- \(0.658 + 7.681\)
- \(1.109 + 0.167\)
- \(0.087 + 1.018\)

\[
= 20.346 \quad (p<0.005)
\]
## Accounting 2 Marks Compared: 2001

### Observed Values

<table>
<thead>
<tr>
<th></th>
<th>&quot;Our&quot; Students</th>
<th>&quot;Other&quot; Students</th>
</tr>
</thead>
<tbody>
<tr>
<td>1st Class Pass</td>
<td>6</td>
<td>56</td>
</tr>
<tr>
<td>2nd Class Pass</td>
<td>15</td>
<td>136</td>
</tr>
<tr>
<td>3rd Class Pass</td>
<td>6</td>
<td>145</td>
</tr>
<tr>
<td>Fail</td>
<td>1</td>
<td>70</td>
</tr>
</tbody>
</table>

### As Percentages

<table>
<thead>
<tr>
<th></th>
<th>&quot;Our&quot; Students</th>
<th>&quot;Other&quot; Students</th>
</tr>
</thead>
<tbody>
<tr>
<td>1st Class Pass</td>
<td>21%</td>
<td>14%</td>
</tr>
<tr>
<td>2nd Class Pass</td>
<td>54%</td>
<td>33%</td>
</tr>
<tr>
<td>3rd Class Pass</td>
<td>21%</td>
<td>36%</td>
</tr>
<tr>
<td>Fail</td>
<td>4%</td>
<td>17%</td>
</tr>
</tbody>
</table>

### Expected Values (Under Null Hypothesis)

<table>
<thead>
<tr>
<th></th>
<th>&quot;Our&quot; Students</th>
<th>&quot;Other&quot; Students</th>
</tr>
</thead>
<tbody>
<tr>
<td>1st Class Pass</td>
<td>4</td>
<td>58</td>
</tr>
<tr>
<td>2nd Class Pass</td>
<td>10</td>
<td>141</td>
</tr>
<tr>
<td>3rd Class Pass</td>
<td>10</td>
<td>141</td>
</tr>
<tr>
<td>Fall</td>
<td>5</td>
<td>66</td>
</tr>
</tbody>
</table>

\[
\sum (O_{ij} - E_{ij})^2 = 1.012 + 2.869 = 8.649
\]

\[
E_{ij} = 1.423 + 2.789 + 0.070 + 0.197 + 0.098 + 0.192
\]

\[
(p < 0.05)
\]
## Level 3 Accounting Courses' Marks Comnbined: 2002 (Accounting 3, Managerial Accounting & Finance 3, Auditing 3, Taxation 3)

<table>
<thead>
<tr>
<th>Observed Values</th>
<th>&quot;Our&quot; Students</th>
<th>&quot;Other&quot; Students</th>
</tr>
</thead>
<tbody>
<tr>
<td>Over 60%</td>
<td>26</td>
<td>207</td>
</tr>
<tr>
<td>Less 60%</td>
<td>71</td>
<td>943</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>As Percentages</th>
<th>&quot;Our&quot; Students</th>
<th>&quot;Other&quot; Students</th>
</tr>
</thead>
<tbody>
<tr>
<td>Over 60%</td>
<td>27%</td>
<td>18%</td>
</tr>
<tr>
<td>Less 60%</td>
<td>73%</td>
<td>82%</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Expected Values (Under Null Hypothesis)</th>
<th>&quot;Our&quot; Students</th>
<th>&quot;Other&quot; Students</th>
</tr>
</thead>
<tbody>
<tr>
<td>Over 60%</td>
<td>18</td>
<td>215</td>
</tr>
<tr>
<td>Less 60%</td>
<td>79</td>
<td>935</td>
</tr>
</tbody>
</table>

\[
\sum (O_{ij} - E_{ij})^2 = 3.422 + 0.786
\]

\[
E_{ij} = 0.289 + 0.066
\]

\[
\sum (O_{ij} - E_{ij})^2 = 4.564 \quad (p<0.1)
\]
Managerial Accounting & Finance 3, Auditing 3 & Accounting 3 Marks Compared: 2002

<table>
<thead>
<tr>
<th>Observed Values</th>
<th>&quot;Our&quot; Students</th>
<th>&quot;Other&quot; Students</th>
</tr>
</thead>
<tbody>
<tr>
<td>Over 60%</td>
<td>26</td>
<td>207</td>
</tr>
<tr>
<td>Less 60%</td>
<td>71</td>
<td>843</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>As Percentages</th>
<th>&quot;Our&quot; Students</th>
<th>&quot;Other&quot; Students</th>
</tr>
</thead>
<tbody>
<tr>
<td>Over 60%</td>
<td>27%</td>
<td>20%</td>
</tr>
<tr>
<td>Less 60%</td>
<td>73%</td>
<td>80%</td>
</tr>
</tbody>
</table>

Expected Values (Under Null Hypothesis)

<table>
<thead>
<tr>
<th>Expected Values (Under Null Hypothesis)</th>
<th>&quot;Our&quot; Students</th>
<th>&quot;Other&quot; Students</th>
</tr>
</thead>
<tbody>
<tr>
<td>Over 60%</td>
<td>20</td>
<td>213</td>
</tr>
<tr>
<td>Less 60%</td>
<td>77</td>
<td>837</td>
</tr>
</tbody>
</table>

\[
\sum (O_{ij} - E_{ij})^2 = 2.011 + 0.513 \\
E_{ij} = 0.186 + 0.047 \\
= 2.757 (p<0.1)
\]
# Appendix 38

## Accounting 3 Marks Compared: 2002

### Observed Values

<table>
<thead>
<tr>
<th></th>
<th>&quot;Our&quot; Students</th>
<th>&quot;Other&quot; Students</th>
</tr>
</thead>
<tbody>
<tr>
<td>1st Class Pass</td>
<td>3</td>
<td>13</td>
</tr>
<tr>
<td>2nd Class Pass</td>
<td>7</td>
<td>44</td>
</tr>
<tr>
<td>3rd Class Pass</td>
<td>16</td>
<td>195</td>
</tr>
<tr>
<td>Fail</td>
<td>10</td>
<td>139</td>
</tr>
</tbody>
</table>

### As Percentages

<table>
<thead>
<tr>
<th></th>
<th>&quot;Our&quot; Students</th>
<th>&quot;Other&quot; Students</th>
</tr>
</thead>
<tbody>
<tr>
<td>1st Class Pass</td>
<td>8%</td>
<td>3%</td>
</tr>
<tr>
<td>2nd Class Pass</td>
<td>19%</td>
<td>11%</td>
</tr>
<tr>
<td>3rd Class Pass</td>
<td>44%</td>
<td>50%</td>
</tr>
<tr>
<td>Fail</td>
<td>28%</td>
<td>36%</td>
</tr>
</tbody>
</table>

### Expected Values (Under Null Hypothesis)

<table>
<thead>
<tr>
<th></th>
<th>&quot;Our&quot; Students</th>
<th>&quot;Other&quot; Students</th>
</tr>
</thead>
<tbody>
<tr>
<td>1st Class Pass</td>
<td>1</td>
<td>15</td>
</tr>
<tr>
<td>2nd Class Pass</td>
<td>4</td>
<td>47</td>
</tr>
<tr>
<td>3rd Class Pass</td>
<td>18</td>
<td>193</td>
</tr>
<tr>
<td>Fail</td>
<td>13</td>
<td>136</td>
</tr>
</tbody>
</table>

\[
\Sigma (O_{ij} - E_{ij})^2 = 2.021 + 1.696 = 4.826 \quad (p<0.1)
\]
## Auditing 3 Marks Compared: 2002

### Observed Values

<table>
<thead>
<tr>
<th></th>
<th>&quot;Our&quot; Students</th>
<th>&quot;Other&quot; Students</th>
</tr>
</thead>
<tbody>
<tr>
<td>Over 60%</td>
<td>6</td>
<td>40</td>
</tr>
<tr>
<td>Less 60%</td>
<td>19</td>
<td>186</td>
</tr>
</tbody>
</table>

### As Percentages

<table>
<thead>
<tr>
<th></th>
<th>&quot;Our&quot; Students</th>
<th>&quot;Other&quot; Students</th>
</tr>
</thead>
<tbody>
<tr>
<td>Over 60%</td>
<td>24%</td>
<td>18%</td>
</tr>
<tr>
<td>Less 60%</td>
<td>76%</td>
<td>82%</td>
</tr>
</tbody>
</table>

### Expected Values (Under Null Hypothesis)

<table>
<thead>
<tr>
<th></th>
<th>&quot;Our&quot; Students</th>
<th>&quot;Other&quot; Students</th>
</tr>
</thead>
<tbody>
<tr>
<td>Over 60%</td>
<td>5</td>
<td>41</td>
</tr>
<tr>
<td>Less 60%</td>
<td>20</td>
<td>185</td>
</tr>
</tbody>
</table>

\[
\sum (O_i - E_i)^2 = 0.439 + 0.099
\]

\[
E_{ij} = 0.049 + 0.011
\]

\[
= 0.597 \quad \text{(p<0.9)}
\]
## Managerial Accounting & Finance 3 Marks Compared: 2002

<table>
<thead>
<tr>
<th></th>
<th>&quot;Our&quot; Students</th>
<th>&quot;Other&quot; Students</th>
</tr>
</thead>
<tbody>
<tr>
<td>Over 60%</td>
<td>10</td>
<td>110</td>
</tr>
<tr>
<td>Less 60%</td>
<td>26</td>
<td>323</td>
</tr>
</tbody>
</table>

### As Percentages

<table>
<thead>
<tr>
<th></th>
<th>&quot;Our&quot; Students</th>
<th>&quot;Other&quot; Students</th>
</tr>
</thead>
<tbody>
<tr>
<td>Over 60%</td>
<td>28%</td>
<td>25%</td>
</tr>
<tr>
<td>Less 60%</td>
<td>72%</td>
<td>75%</td>
</tr>
</tbody>
</table>

### Expected Values (Under Null Hypothesis)

<table>
<thead>
<tr>
<th></th>
<th>&quot;Our&quot; Students</th>
<th>&quot;Other&quot; Students</th>
</tr>
</thead>
<tbody>
<tr>
<td>Over 60%</td>
<td>9</td>
<td>111</td>
</tr>
<tr>
<td>Less 60%</td>
<td>27</td>
<td>322</td>
</tr>
</tbody>
</table>

\[
\sum (O_{ij} - E_{ij})^2 = \sum E_{ij} = 0.068 + 0.023 = 0.098 \\
(p < 0.9)
\]
## Taxation 3 Marks Compared: 2002

### Observed Values

<table>
<thead>
<tr>
<th></th>
<th>&quot;Our&quot; Students</th>
<th>&quot;Other&quot; Students</th>
</tr>
</thead>
<tbody>
<tr>
<td>Over 60%</td>
<td>19</td>
<td>125</td>
</tr>
<tr>
<td>Less 60%</td>
<td>12</td>
<td>224</td>
</tr>
</tbody>
</table>

### As Percentages

<table>
<thead>
<tr>
<th></th>
<th>&quot;Our&quot; Students</th>
<th>&quot;Other&quot; Students</th>
</tr>
</thead>
<tbody>
<tr>
<td>Over 60%</td>
<td>61%</td>
<td>36%</td>
</tr>
<tr>
<td>Less 60%</td>
<td>39%</td>
<td>64%</td>
</tr>
</tbody>
</table>

### Expected Values (Under Null Hypothesis)

<table>
<thead>
<tr>
<th></th>
<th>&quot;Our&quot; Students</th>
<th>&quot;Other&quot; Students</th>
</tr>
</thead>
<tbody>
<tr>
<td>Over 60%</td>
<td>12</td>
<td>132</td>
</tr>
<tr>
<td>Less 60%</td>
<td>19</td>
<td>217</td>
</tr>
</tbody>
</table>

$$\sum (O_{ij} - E_{ij})^2 = 4.478 + 2.732$$

$$E_{ij} = 0.398 + 0.243$$

$$\sum = 7.850 \quad (p<0.025)$$
Comparison of 1997 Commercial Law 1A Marks of 'our' and 'other' Students by Matriculation Points: < 32 points

<table>
<thead>
<tr>
<th></th>
<th>&quot;Our&quot; Students</th>
<th>&quot;Other&quot; Students</th>
</tr>
</thead>
<tbody>
<tr>
<td>1st Class Pass</td>
<td>2</td>
<td>1</td>
</tr>
<tr>
<td>2nd Class Pass</td>
<td>3</td>
<td>22</td>
</tr>
<tr>
<td>3rd Class Pass</td>
<td>3</td>
<td>47</td>
</tr>
<tr>
<td>Fail</td>
<td>2</td>
<td>76</td>
</tr>
</tbody>
</table>

As Percentages

<table>
<thead>
<tr>
<th></th>
<th>&quot;Our&quot; Students</th>
<th>&quot;Other&quot; Students</th>
</tr>
</thead>
<tbody>
<tr>
<td>1st Class Pass</td>
<td>20%</td>
<td>1%</td>
</tr>
<tr>
<td>2nd Class Pass</td>
<td>30%</td>
<td>15%</td>
</tr>
<tr>
<td>3rd Class Pass</td>
<td>30%</td>
<td>32%</td>
</tr>
<tr>
<td>Fail</td>
<td>20%</td>
<td>52%</td>
</tr>
</tbody>
</table>

Expected Values (Under Null Hypothesis)

<table>
<thead>
<tr>
<th></th>
<th>&quot;Our&quot; Students</th>
<th>&quot;Other&quot; Students</th>
</tr>
</thead>
<tbody>
<tr>
<td>1st Class Pass</td>
<td>0</td>
<td>3</td>
</tr>
<tr>
<td>2nd Class Pass</td>
<td>2</td>
<td>23</td>
</tr>
<tr>
<td>3rd Class Pass</td>
<td>3</td>
<td>47</td>
</tr>
<tr>
<td>Fail</td>
<td>5</td>
<td>73</td>
</tr>
</tbody>
</table>

\[
\Sigma (O_{ij} - E_{ij})^2 = 16.992 + 1.219 = 21.396 \quad (p<0.005)
\]
Comparison of 1997 Commercial Law 1A Marks of 'our' and 'other' Students by Matriculation Points: 33 - 35 points

<table>
<thead>
<tr>
<th></th>
<th>&quot;Our&quot; Students</th>
<th>&quot;Other&quot; Students</th>
</tr>
</thead>
<tbody>
<tr>
<td>1st Class Pass</td>
<td>1</td>
<td>2</td>
</tr>
<tr>
<td>2nd Class Pass</td>
<td>5</td>
<td>32</td>
</tr>
<tr>
<td>3rd Class Pass</td>
<td>4</td>
<td>23</td>
</tr>
<tr>
<td>Fail</td>
<td>3</td>
<td>55</td>
</tr>
</tbody>
</table>

As Percentages

<table>
<thead>
<tr>
<th></th>
<th>&quot;Our&quot; Students</th>
<th>&quot;Other&quot; Students</th>
</tr>
</thead>
<tbody>
<tr>
<td>1st Class Pass</td>
<td>8%</td>
<td>2%</td>
</tr>
<tr>
<td>2nd Class Pass</td>
<td>38%</td>
<td>29%</td>
</tr>
<tr>
<td>3rd Class Pass</td>
<td>31%</td>
<td>21%</td>
</tr>
<tr>
<td>Fail</td>
<td>23%</td>
<td>49%</td>
</tr>
</tbody>
</table>

Expected Values (Under Null Hypothesis)

<table>
<thead>
<tr>
<th></th>
<th>&quot;Our&quot; Students</th>
<th>&quot;Other&quot; Students</th>
</tr>
</thead>
<tbody>
<tr>
<td>1st Class Pass</td>
<td>0</td>
<td>3</td>
</tr>
<tr>
<td>2nd Class Pass</td>
<td>4</td>
<td>33</td>
</tr>
<tr>
<td>3rd Class Pass</td>
<td>3</td>
<td>24</td>
</tr>
<tr>
<td>Fail</td>
<td>6</td>
<td>52</td>
</tr>
</tbody>
</table>

$$\sum (O_{ij} - E_{ij})^2 = \begin{array}{c} \begin{array}{c} 1.517 \ \ + \ \ 0.345 \\ 0.506 \ \ + \ \ 1.524 \\ 0.176 \ \ + \ \ 0.040 \\ 0.059 \ \ + \ \ 0.177 \end{array} \end{array} = 4.344$$

(p<0.15) no significant relationship
Comparison of 1997 Commercial Law 1A Marks of 'our' and 'other' Students by Matriculation Points: 36 - 39 points

<table>
<thead>
<tr>
<th></th>
<th>&quot;Our&quot; Students</th>
<th>&quot;Other&quot; Students</th>
</tr>
</thead>
<tbody>
<tr>
<td>1st Class Pass</td>
<td>2</td>
<td>5</td>
</tr>
<tr>
<td>2nd Class Pass</td>
<td>12</td>
<td>42</td>
</tr>
<tr>
<td>3rd Class Pass</td>
<td>3</td>
<td>66</td>
</tr>
<tr>
<td>Fail</td>
<td>2</td>
<td>44</td>
</tr>
</tbody>
</table>

As Percentages

<table>
<thead>
<tr>
<th></th>
<th>&quot;Our&quot; Students</th>
<th>&quot;Other&quot; Students</th>
</tr>
</thead>
<tbody>
<tr>
<td>1st Class Pass</td>
<td>11%</td>
<td>3%</td>
</tr>
<tr>
<td>2nd Class Pass</td>
<td>63%</td>
<td>27%</td>
</tr>
<tr>
<td>3rd Class Pass</td>
<td>16%</td>
<td>42%</td>
</tr>
<tr>
<td>Fail</td>
<td>11%</td>
<td>28%</td>
</tr>
</tbody>
</table>

Expected Values (Under Null Hypothesis)

<table>
<thead>
<tr>
<th></th>
<th>&quot;Our&quot; Students</th>
<th>&quot;Other&quot; Students</th>
</tr>
</thead>
<tbody>
<tr>
<td>1st Class Pass</td>
<td>1</td>
<td>6</td>
</tr>
<tr>
<td>2nd Class Pass</td>
<td>6</td>
<td>48</td>
</tr>
<tr>
<td>3rd Class Pass</td>
<td>7</td>
<td>62</td>
</tr>
<tr>
<td>Fail</td>
<td>5</td>
<td>41</td>
</tr>
</tbody>
</table>

\[ \Sigma (O_{ij} - E_{ij})^2 = 2.049 + 6.531 \]

\[ E_{ij} \]

\[ 2.657 + 1.771 \]

\[ 0.248 + 0.790 \]

\[ 0.322 + 0.214 \]

\[ = 14.583 \quad (p<0.005) \]
Comparison of 1997 Commercial Law 1A Marks of 'our' and 'other' Students by Matriculation Points: 40 - 43 points

<table>
<thead>
<tr>
<th>Observed Values</th>
<th>&quot;Our&quot; Students</th>
<th>&quot;Other&quot; Students</th>
</tr>
</thead>
<tbody>
<tr>
<td>Dean's Recommendation</td>
<td>6</td>
<td>51</td>
</tr>
<tr>
<td>No Recommendation</td>
<td>1</td>
<td>45</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>As Percentages</th>
<th>&quot;Our&quot; Students</th>
<th>&quot;Other&quot; Students</th>
</tr>
</thead>
<tbody>
<tr>
<td>Dean's Recommendation</td>
<td>86%</td>
<td>53%</td>
</tr>
<tr>
<td>No Recommendation</td>
<td>14%</td>
<td>47%</td>
</tr>
</tbody>
</table>

Expected Values (Under Null Hypothesis)

<table>
<thead>
<tr>
<th>Expected Values (Under Null Hypothesis)</th>
<th>&quot;Our&quot; Students</th>
<th>&quot;Other&quot; Students</th>
</tr>
</thead>
<tbody>
<tr>
<td>Dean's Recommendation</td>
<td>4</td>
<td>53</td>
</tr>
<tr>
<td>No Recommendation</td>
<td>3</td>
<td>43</td>
</tr>
</tbody>
</table>

\[
\sum (O_{ij} - E_{ij})^2 = 1.167 + 1.446 = 2.613
\]

\[
E_{ij} = \frac{0.085}{0.105} = \frac{0.085}{0.105} \approx 0.808 (p<0.1)
\]
Comparison of 1997 Commercial Law 1A Marks of 'our' and 'other' Students by Matriculation Points: > 44 points

<table>
<thead>
<tr>
<th></th>
<th>&quot;Our&quot; Students</th>
<th>&quot;Other&quot; Students</th>
</tr>
</thead>
<tbody>
<tr>
<td>1st Class Pass</td>
<td>1</td>
<td>2</td>
</tr>
<tr>
<td>2nd Class Pass</td>
<td>1</td>
<td>2</td>
</tr>
<tr>
<td>3rd Class Pass</td>
<td>0</td>
<td>17</td>
</tr>
<tr>
<td>Fail</td>
<td>0</td>
<td>51</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th></th>
<th>&quot;Our&quot; Students</th>
<th>&quot;Other&quot; Students</th>
</tr>
</thead>
<tbody>
<tr>
<td>1st Class Pass</td>
<td>50%</td>
<td>3%</td>
</tr>
<tr>
<td>2nd Class Pass</td>
<td>50%</td>
<td>3%</td>
</tr>
<tr>
<td>3rd Class Pass</td>
<td>0%</td>
<td>24%</td>
</tr>
<tr>
<td>Fail</td>
<td>0%</td>
<td>71%</td>
</tr>
</tbody>
</table>

Expected Values (Under Null Hypothesis)

<table>
<thead>
<tr>
<th></th>
<th>&quot;Our&quot; Students</th>
<th>&quot;Other&quot; Students</th>
</tr>
</thead>
<tbody>
<tr>
<td>1st Class Pass</td>
<td>0</td>
<td>3</td>
</tr>
<tr>
<td>2nd Class Pass</td>
<td>0</td>
<td>3</td>
</tr>
<tr>
<td>3rd Class Pass</td>
<td>0</td>
<td>17</td>
</tr>
<tr>
<td>Fail</td>
<td>1</td>
<td>50</td>
</tr>
</tbody>
</table>

$$
\Sigma (O_{ij} - E_{ij})^2 = 10.414 + 10.414
\frac{E_{ij}}{0.459 + 1.378}
0.289 + 0.289
0.013 + 0.038
$$

$$
= 23.296 \quad (p<0.005)
$$