Sent: Tue 2016/12/27 09:42 PM

Dear Honourable Davis

Your wish to have all your questions answered in writing is duly noted. However, we are not able to attend to your request at this stage because of the following reasons:

       Umalusi is currently operating with a limited staff complement because of the holidays. The staff that remain at the office have specific and laborious tasks that they need to fulfil for the Council. Any attempt to dedicate staff to give insights into the intricate standardisation decisions could compromise the huge assignment at hand and the stringent deadlines ahead of us.

       I want to reiterate the point I made earlier that we are more likely to do justice to the discussion on standardisation in a workshop environment where all your concerns can be answered *tête-à-tête*. This will also be for the benefit of other members of the Portfolio Committee on Basic Education.

       Your request to have all your questions answered promptly seems to hinge on the assumption that you may need to deal with media queries in the aftermath of our media briefing on Thursday. My humble view is that this should not be the compelling reason for us to rush what seems to be a very important stakeholder engagement. The media has never expected any observer of the standardisation processes to give a comment on the standardisation decision making processes and outcomes. The observer status that Umalusi gives to different stakeholders is a privileged position that is given to key education stakeholders with strict confidentiality expectations.

       To this end,  it would be desirable for the Chairperson of the Portfolio Committee to prioritise the proposed workshop in the new year.

In the meantime, kindly receive the attached document that explains some of the underlying principles and processes of standardisation.

Regards,

**Dr Mafu S Rakometsi**

*CEO: Umalusi*

**From:** Gavin Davis []   
**Sent:** 27 December 2016 05:01 PM  
**To:** Dr Mafu Rakometsi < >  
**Cc:** Prof John Volmink < >  
**Subject:** Re: FW: Issues arising from the standardization meeting held in Pretoria 23 December 2016

Dear Dr Rakometsi

Thank you very much for your reply to my email addressed to Professor Volmink.

Firstly, the reason I sent my questions in writing is because I would like a response in writing. This will give me the opportunity to study the response and to send follow-ups if the answers are not clear to me.

Secondly, Umalusi will be briefing the media on Thursday on the standardisation process. There is a possibility that I will be asked to comment on the process, and it would be very useful for me to have clear answers to the questions I have raised before I do so.

I therefore reiterate my request for a response, in writing, to the questions contained in the email addressed to Professor Volmink.

I look forward to hearing from you.

Kind regards

Gavin

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Gavin Davis MP

**On Tue, Dec 27, 2016 at 3:40 PM, Dr Mafu Rakometsi < > wrote:**

**PRIVATE AND CONFIDENTIAL**

Dear Honourable Davis

The email enquiry you sent to Professor John Volmink, Chairperson of Umalusi Council, on 27 December 2016 refers.

I would like to advise that it would be imprudent to attempt to explain the complex standardisation process through the exchange of emails. Arriving at decisions in a standardisation meeting involves a complex set of variables that may not be easy to cogently explain in email conversations. It is for this reason that I wish to propose that you ask the Chairperson of the Portfolio Committee on Basic Education to invite Umalusi to a workshop where the standardisation exercise could be explained and all your questions could be answered. It is my considered view that this will help answer all the important questions you raise.

Sincerely,

**Dr Mafu S Rakometsi**

*CEO: Umalusi*

**From:** Gavin Davis < >  
**Date:** 27 December 2016 at 9:07:11 AM SAST  
**To:** John Volmink < >  
**Subject:** **Issues arising from the standardization meeting held in Pretoria 23 December 2016**

Dear Professor Volmink

It was great to chat briefly after the standardisation meeting on Friday.

I am still gathering my thoughts and attempting to make sense of the data presented and the process followed.

The analysis below is based only on what I observed at the meeting and the incomplete information I have at this point on the adjustment process and outcome. My intention is only to satisfy myself that the process followed will achieve a fair and equitable outcome that is in the best interests of current and future learners.

I am going to group my observations into sections to make this correspondence easier to read and respond to. Some specific questions follow at the end.

**1. Using the raw marks as a proxy for cognitive demand**

As I understand it, Umalusi can only adjust the mark *if there is evidence that the exam paper was more or less cognitively demanding* than previous years. Indeed, the DBE in its submissions on Friday was at pains to identify particularly difficult questions in some of the papers to justify adjusting the marks upwards.

I noticed at Friday's meeting, however, that the starting point for adjusting the marks was not the papers themselves, but the results. In cases when the raw mark was worse than last year’s, the DBE went back to the paper and found difficult questions to explain the drop in the raw mark. The DBE then motivated for the raw mark to be adjusted upwards accordingly.

This methodology seems incorrect. It would seem that – as a general principle – the cognitive demand of the papers should be assessed *independently* of the marks. This should preferably happen before the papers are even written so that there is no need for an adjustment process afterwards.

The obvious problem of using the raw marks as proxy for cognitive demand is that there may be cases in which the paper was of the appropriate standard, but the learners (for whatever reason) were below the standard of previous years. Adjusting the marks upwards in such a case *would therefore mask systemic problems that need to be addressed*.

**2. The tendency to adjust upwards, but not downwards**

From my observations today it seemed that, in most cases when the raw mark was lower than last year, Umalusi and/or DBE pushed for the final mark to be increased using the computer adjustment. However, when the raw mark was higher than last year, the raw mark was in most cases accepted without any downward adjustment. The net effect was an overall increase in the marks.

I mentioned earlier how, when the raw mark for a subject was low, DBE identified tough questions in the paper to justify an upward adjustment. However I did not observe the same methodology being employed when the raw mark was better than last year’s. In other words, in these cases, there was little interrogation of why the raw mark was better than last year’s, and whether this could have been because the paper was ‘too easy’. Instead, *the increased raw mark tended to be accepted as a welcome sign that the system is improving*.

If we are adjusting upwards when the raw mark is low, and keeping the raw mark when the raw mark is high, then I fear *we may end up artificially inflating the marks*. This could result in a situation in which a number of matriculants have passes and bachelor passes on paper but lack the actual cognitive skills to compete in the real world of tertiary study and work.

**3. The tendency to adjust marks regardless of whether the circumstances are exceptional**

You made the important point at the end of the meeting that the raw mark should be the default, and that adjustments should be made only in exceptional circumstances. You added that, out of 58 subjects, 32 were adjusted and only 26 retained the raw mark. It would be interesting to hear, in the case of each adjustment, what made that case exceptional. Because it seemed to me, as an observer, that some adjustments were made as a matter of routine rather than exception.

**4. The impact of progressed learners**

According to a reply to a parliamentary question received on 29 November, as many as 109 391 progressed learners wrote the National Senior Certificate this year – up from 65 673 last year.

It follows, therefore, that that there was a significant increase in the number of weaker students who wrote the NSC. This raises the question of whether the inclusion of progressed learners in the standardisation process leads to certain anomalies.

If the raw scores are used as a proxy to determine whether papers were too difficult or too easy (as described in section 1 above), then it is likely that the inclusion of progressed learners will skew the data. This is because, if the raw marks are lower than previous years (when there were no progressed learners), then these low scores could be as a result of the inclusion of weaker students (i.e. progressed learners) and not because the papers were more difficult.

But, as set out earlier, the only legitimate justification for adjusting the raw scores is if the paper was more or less cognitively demanding than previous years. Could it be that the inclusion of progressed learners in the standardisation process creates additional impetus to adjust the marks upwards, *for reasons not related to the cognitive demand of the papers?*

\*          \*          \*

In conclusion, I have a number of questions relating to my observations today that I would like to put to you and your team:

1.    Am I correct that Umalusi can only adjust the raw mark if there is evidence that the exam paper was more or less cognitively demanding than previous years? Is this protocol formalised in any documents?

2.    Is it fair to say that the starting point for the adjustments was not the exam papers themselves but the raw marks?

3.    Is any attempt made to assess the cognitive demand of each paper *before* it is written? If not, why not?

4.    How does Umalusi determine the cognitive demand of each paper independently of the raw marks, if at all?

5.    How can we satisfy ourselves that the upward adjustment of marks does not mask systemic problems that need to be addressed?

6.    What criteria and/or set of variables does the computer use to determine whether or not there should be an adjustment? On what grounds is the recommendation of the computer either accepted or rejected by Umalusi?

7.    Is it fair to say that, in most cases, when the raw mark was lower than last year the mark was adjusted upwards but, when the raw mark was higher than last year, the raw mark was in most cases accepted without any downward adjustment?

8.    You mentioned that 32 of the 58 subjects were adjusted. Please can Umalusi provide a list of the subjects adjusted and whether each was adjusted upwards or downwards from last year.

9.    Given that adjustments can only be effected in exceptional circumstances, please can Umalusi indicate the exceptional circumstance in the case of each adjustment, including the justification for the adjustment in each case.

10. Were progressed learners included in the standardisation process? If so, how many progressed learners were included?

11. Is it fair to say that the inclusion of progressed learners in the standardisation process creates additional impetus to adjust the marks upwards, for reasons not related to the cognitive demand of the papers?

I look forward to Umalusi’s response to these questions, which are posed in the spirit of constructive engagement. Thanks again for your unwavering commitment to improving education in our country.

Kind regards

Gavin

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Gavin Davis MP

Parliament of South Africa