Does subject matter? A comparative study of framing and classification in the online and contact versions of two postgraduate management courses and the implications for student learning.

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COMPULSORY DECLARATION

This work has not been previously submitted in whole, or in part, for the award of any degree. It is my own work. Each significant contribution to, and quotation in, this dissertation from the work, or works, of other people has been attributed, and has been cited and referenced.

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Abstract
This study is positioned in the context of the South African higher education landscape, which is currently grappling with issues of access and inequality. Online education is one of the potential approaches to expand access to South African students, but has often been met with skepticism as to its pedagogical quality, and has been perceived as an inferior alternative to traditional contact education. A comparative research design is followed in which two courses within a postgraduate marketing management qualification at a South African public university are compared. This qualification is offered in both contact and online format. The same courses within different modes of education are compared, as well as different courses within the same mode of education. A coding system was created based on Basil Bernstein's concepts of framing and classification, and the courses were compared based on various dimensions of framing and classification. The study aimed to explore the affordances and limitations of both contact and online education. It was found that the 'sequence' and 'pace' aspects of framing are impacted by mode of education, with the online learning environment allowing students more agency in determining the pace and sequence of their learning. The 'hierarchical rules' aspect of framing is also impacted by mode, with the online courses offering an inherently non-hierarchical learning environment. It was found that weaker framing over these elements can present either an affordance or limitation, depending on the subject matter, with some types of subject matter being well suited to weaker framing over sequence, pace, and hierarchical rules, and others being constrained by it.

Keywords: pedagogy, online education, Basil Bernstein, classification and framing, subject matter, South African higher education.

Introduction

The South African higher education space is one steeped in historic inequality. As public universities and government seek to address this inequality, as well as the issues of access for the majority of young South Africans, there is a need to explore innovative ways of delivering high quality, accessible, and affordable higher education to large groups of students. Online education has been presented as a possible strategy to address this need, but has often been perceived as the inferior substitute to traditional, contact education, regarded with scepticism as to its completion and pass rates, and its ability to support interactive and engaging education. This comparative study addresses some of those assumptions and explores the affordances and limitations of both the online and contact learning environments.

In this study I explore two learning environments, and compare the pedagogic practice present in each, as it relates to two different forms of subject matter. The Postgraduate Diploma in Management (specialising in Marketing) is a postgraduate commerce qualification offered at a South African public university. The programme is offered both on campus, as a full-time one year programme, and, in online mode, as a part-time two year programme, targeted at working students across the country and continent. In the latter, all learning material is presented online, but final exams are written in physical venues under invigilation. In this analysis I will look at two of the thirteen courses within the programme – Introduction to Marketing and Managerial Finance. I will choose one section from each course – the 'segmentation, targeting and positioning (STP)' topic from the former, and the 'adjustments and annual financial statements' topic from the latter – and compare the classification and framing of each in both the online and physical learning environments. While the scope of the study is limited, it nonetheless reveals important principles underpinning the different modes of education.

Basil Bernstein presents two fundamental concepts for analysing the underlying structures and embedded characteristics of pedagogic practice – namely classification and framing (Bernstein, 2000). Classification is concerned with the relations between categories, and specifically the relative strength or weakness of the boundaries between categories, while framing is concerned with the relations within categories, and how power and control are distributed within categories.

These concepts are useful in analysing pedagogic practice to determine where possible weaknesses and opportunities lie in course design or facilitation. The classification and framing in evidence in the pedagogic environment shape the student's experience, as well as their ability to achieve the expected outcomes. Are students able to acquire the necessary recognition and realisation rules to achieve success in this learning environment? In other words, can students recognise what constitutes legitimate discourse in a learning environment and, then, can students reproduce the legitimate discourse in order to succeed in this learning environment?

Context and rationale

South Africa is not the only country facing ongoing debates related to higher education. The value of higher education to society, and whether it truly serves as a public good, is a global issue. Hazelkorn & Gibson (2017) point out that higher education, in many parts of the world, is often perceived as too self-serving, reserved only for the affluent, and many argue that there are more pressing demands on state funding, such as early schooling, and healthcare. Public universities are confronted with the need for public accountability and transparency, while still trying to maintain their autonomy. Many people feel that these universities need to demonstrate the value they provide in terms of growing the economy, producing research and new knowledge that is accessible to all, and positively impacting the communities around them (Hazelkorn & Gibson, 2017).

We are also witnessing a continued marketisation of higher education, with education increasingly being perceived as a commodity, purchased by a student consumer. The risk is that when students view education as a purchasable product, and hold the assumption that a certain level of work and a fee should automatically result in a qualification, the student then becomes a passive consumer who surrenders personal responsibility for their own learning (Naidoo & Williams, 2015). There is also the risk that education will be valued solely for its exchange value, rather than its intrinsic use value, and the status of a particular university's qualification in the labour market will become more important than the actual teaching quality received by the student (Naidoo & Williams, 2015). These trends related to the marketisation and commodification are evident not only in the public university, but also in many private institutions positioning themselves as alternatives to the public university, offering competitive, market-related skills. Now that the broader issues relating to higher education on a global level have been discussed, it is important to explore the African, and South African, context specifically.

The demand for access to higher education in Africa is increasing, and it is often positioned as the key to modernisation and development on the continent, especially in the context of the knowledge economy of the 21st century (Teferra & Altbach, 2004). While its importance is emphasized, African higher education is confronted with a number of challenges. The key issue is lack of funding, along with lack of resources and teaching materials, and the inability of the majority of African people to afford high tuition fees (Teferra & Altbach, 2004).

The colonial legacy of African higher education is still evident today. Teferra & Altbach (2004) discuss the various ways in which this legacy is apparent. Firstly, only a limited number of 'Western' universities were established to train a select group of African people, who would go on to work in the colonial administration. This has resulted in severely limited capacity in African universities that could not accommodate the majority of the population. In addition, curricula were often limited to law and other related fields that would be useful to the colonial administration. These institutions are now also faced with bureaucracy, inefficiency, 'brain drain' of skilled graduates, and limits on academic freedom and autonomy due to the political climate.

The above factors have resulted in the growth of private institutions of higher education in Africa, attempting to address increased demand for access, the declining capacity of public universities, and the demand for labour market skills (Teferra & Altbach, 2004). According to Teferra & Altbach (2004), these private institutions are generally smaller, mainly based in large cities, offering niche qualifications, and often faced with scepticism regarding the quality of their educational offerings. Interestingly, the online

version of the programme under study was marketed to students across the African continent as a means to address some of the issues discussed above.

While the South African higher education landscape shares some characteristics with the broader African landscape, it also has its own unique features and challenges. Higher education is also seen as a driver of economic development in South Africa, in the context of globalisation and the knowledge economy (Scott, Yeld, & Hendry, 2007). The legacy of colonialism and apartheid are evident in the South African higher education system. At many universities there is high attrition, particularly among black students, at the end of the first year of study (Scott, Yeld, & Hendry, 2007). This high level of attrition is caused by a number of factors, including funding challenges, difficulty adjusting to the educational requirements of university given the subpar education received in public schools, and the resulting demoralisation (Scott, Yeld, & Hendry, 2007).

Scott, Yeld, & Hendry (2007) explain that much of the structure and curricula of South African university programmes were established early in the last century, and were designed for a relatively homogenous student body, especially with regard to educational capital. Now that the student body is much more diverse, students from previously disadvantaged backgrounds are often finding it difficult to adapt to these already established structures. Where there is diversity and inequality, a unitary approach which favours some students over others is not sustainable (Scott, Yeld, & Hendry, 2007). The authors argue that there are two pertinent elements of equity in South African higher education – equity of access and equity of outcomes. While we have witnessed many efforts to increase access in the last few years, it is also important to ensure that once a student has access, they also have an equal chance to achieve the desired learning outcomes that will equip them for the future. Scott, Yeld, & Hendry (2007) argue for a widening of the range of educational structures and approaches used in higher education, and specifically for a curriculum structure that is flexible enough to accommodate differentials in the pace of progression. These authors suggest foundational courses, extended degree programmes, and additional programme time (including both contact and independent study time), as possible interventions to address the need for more diversity in education provision (Scott, Yeld, & Hendry, 2007). While online education is not discussed at length, its potential for flexibility, specifically in terms of pace of learning, makes it an important avenue to consider when addressing the need for diversity in education provision in our current context. The authors argue that the seemingly intractable tensions between widening participation, increasing success rates, and enhancing quality, as well as the desire to not compromise exit standards, calls for alternative paths to the same learning outcomes. Online education could be one of the feasible ways to address these challenges.

Badat (2005) asserts that the increasing diversity of formats of higher education provision in South Africa has major implications for access, equity, and opportunity for historically disadvantaged groups, specifically black South Africans who have experienced inequitable access to, and low participation in, higher education. According to him, distance higher education is one of the strategies for addressing this issue, and contributing to access and equity. Distance education takes many forms; one of the most relevant in the current context being online education. The prevalence of personal computers and increased access to the internet has allowed a sophisticated level of interactivity, which has presented new opportunities for distance education (Mitra & Hall, 2002). Badat (2005) argues that education provision exists on a continuum with provision purely at a distance on one end of the continuum, and provision that is solely face to face on the other. With the infiltration of the internet and information technology into so many aspects of our daily lives, its impact in education is already clear. Indeed many

contact university courses have various online elements, such as online discussion forums, learner management systems, online tasks, recorded lectures, etc. By the same token, many online courses have occasional contact sessions. As this study explores the affordances and limitations of both contact and online education, the research could support an informed approach for using an appropriate blend of the two modes.

While increasing advances in information technology, and online education specifically, contribute to the viability of online education as a needed innovation in higher learning, the South African context still presents some barriers to online education, such as cost, accessibility, and infrastructure, as it relates to technological equipment and internet connectivity for the majority of South Africans.

Online education remains, however, a viable innovation for expanding accessibility of higher education in South Africa. In addition to the many young, black South Africans struggling to access higher education, Badat (2005) describes the various other groups for which traditional, full-time, contact education opportunities are either inaccessible or inappropriate. These include mature students, those in employment, those limited by personal circumstance, geographic location, or inadequate prior learning experiences. He argues that high quality, distance higher education can act as an immensely valuable public and social good, contributing to economic development, social equity, and justice. There is also the opportunity to make this provision of education affordable, by taking advantage of the economies of scale arising from large student numbers.

While there is clearly a need for online education in the South African higher education space, as well as various benefits that could arise from its implementation, it is also confronted with many challenges. Distance education in South Africa is widely perceived as offering poor quality programmes, subpar learning materials, very little student support or formative assessment, and achieving low throughput and success rates in comparison to contact alternatives (Badat, 2005). In addition, online education on a global scale is often considered with scepticism due to the association with massive open online courses (or MOOCs) which feature very little, if any, student support, as well as startlingly low completion and pass rates. There has been significant global interest in MOOCs in recent years, resulting in many reputable universities, such as Harvard, offering short courses in this format (Coffrin et al., 2014). These courses are generally characterised by a high level of initial student interest, followed by high levels of attrition. With MOOC completion rates between 3-5%, it is clear that there are challenges associated with providing high quality education at a huge scale in this format (Coffrin et al., 2014).

Given the above, one must remember that online education cannot be assumed to be a panacea for all of South Africa's higher education challenges, and that it will not produce high quality education per se, especially if little thought is given to teaching and learning (Badat, 2005). In order for online higher education to become a viable alternative to the traditional contact model that dominates the South African higher education space, attention needs to be paid to the pedagogical quality of these programmes.

The teaching and learning approach used in face-to-face classrooms cannot simply be duplicated online. The affordances and limitations of the online learning context need to be considered, and teaching and learning interventions need to be suited to the platform. Similarly, traditional contact education has its own limitations, and may benefit from the inclusion of online learning interventions. This study aims to

explore some of these pedagogical considerations through a comparative study of an online and contact postgraduate programme at a South African public university.

Literature review

The literature review will unpack theory on three broad topics. Firstly, I will examine other studies that have used Bernstein's concepts of classification and framing, and discuss their findings. Then I will consider the views of various authors on the characteristics and potential of online learning. Lastly, I will reference authors who have argued for a renewed focus on subject matter and the significance of this.

Studies using classification and framing

Acquisition of appropriate recognition and realisation rules is key for student success in the higher education environment, and this is often impacted by the level of framing present in a particular learning environment. Recognition rules refer to the ability of the student to recognise or identify what counts as valid knowledge in this context (Bernstein, 2000). While a student may be able to recognise what success or achievement looks like in a certain pedagogic context, it does not mean they are able to realise this. Realisation rules refer to the student's ability to speak or perform the appropriate discourse, allowing them to demonstrate valid acquisition of knowledge (Bernstein, 2000).

Below I present a number of different studies of classification and framing. Gamble & Hoadley (2011), Morais (2010), Bolton (2006), Muller & Hoadley (2010), Aploon-Zokufa (2013), and Morais & Neves (2017) use framing in a school context, while Ellery (2017) and Scott, Yeld, & Hendry (2007) use the concept in the context of higher education. Arasaratnam-Smith & Northcote (2017) use framing in their study of online learning. The following paragraphs also include Ensor (2004), Hoadley & Muller (2010), and Hoadley (2006)'s findings on framing. Each study is discussed in turn and an overview of the findings is provided at the end of the section.

Gamble & Hoadley (2011) use framing in the school context specifically, but their insights on framing can be applied to the university context under study. Framing is concerned with the control on communication in interactional pedagogic relations (Bernstein, 2000). Framing explores which agent – the transmitter or the acquirer – holds the decision-making power over five elements, namely selection, sequencing, pacing, evaluative criteria, and hierarchical rules. The stronger the framing, the more explicit control the transmitter has over these five elements (Bernstein, 2000; Bernstein, 1990). The weaker the framing, the more apparent control the acquirer has over these five elements (Bernstein, 2000; Bernstein, 1990). Selection refers to the kinds of content and knowledge chosen as part of the course. Sequencing is the order in which elements are accessed and knowledge is built. Pacing refers to time allocated to tasks and how strictly this is enforced. Evaluative criteria refer to the evaluation methods used to assess student learning. Lastly, hierarchical rules refer to the degree of openness and the aspects of hierarchy present in relationships between teacher and student.

Gamble & Hoadley (2011) argue that an instructor who displays very weak framing in their teaching does not make the criteria for evaluation explicit, therefore not giving the student the possibility of learning the legitimate discourse and potentially doing better in future. The pedagogic practice is left

implicit. On the other hand, an instructor who demonstrates strong framing in their teaching explicates the legitimate discourse, making the pedagogic practice explicit. This allows the student the opportunity for self-evaluation, and the ability to provide a more accomplished and valid discourse in future. Gamble & Hoadley (2011) argue that weak framing is only appropriate in contexts where learners can deal with ambiguity and where meanings are negotiated rather than given. They found that many working class students struggled to gain access to these recognition and realisation rules, not knowing what was required of them to produce legitimate discourse. They also found that strong framing, especially over hierarchical rules, allowed working class students a possible entry point into the elaborated code of the school, making that transition from home to school easier.

Ellery (2017) shares the view that framing has a significant impact on student success, and argues that a combination of strong and weak framing in courses – rather than simply strong framing across the board – is imperative for student access and success in the higher education space. By analysing and comparing the framing of university-level foundational and first year science courses, this author concludes that stronger framing over selection, sequencing, and evaluative criteria, as well as relatively weaker framing over pacing of knowledge, and hierarchical rules, is helpful in equipping working class students for the transition to university. She argues, for example, that students find a more casual, and weakly framed relationship with their instructors quite valuable, especially when there are few constraints for students in asking for additional help during or after class. While Ellery (2017) does not use the terms recognition and realisation rules explicitly, she does refer to the student's ability to perform as an accomplished science learner, and eventually an accomplished science knower, able to perform the expected tasks associated with this role.

Morais & Neves (2017) concur with Ellery (2017) regarding the optimal approach to framing, in their study of school science using Bernstein's theoretical concepts. They find that much of the literature in this area presents the concepts of classification and framing in their extreme values, according to two ideal types of pedagogic codes, which are collection/integration curricula, and visible/invisible pedagogies. They argue for a mixed pedagogy approach in which classification and framing may be stronger or weaker in different instances (Morais & Neves, 2017). In their study of school science, the authors state that strong framing over evaluative criteria is ideal, ensuring that the required scientific knowledge is made explicit, while weak framing over pacing and hierarchical rules is optimal. They also touch on classification, stating that weak classification over intradisciplinary relations between distinct scientific knowledge, as well as weak classification over the relations between teachers' space and students' space in the classroom is helpful for student success (Morais & Neves, 2017). These pedagogic practices are centred on narrowing social gaps, particularly for socially disadvantaged students, by increasing access to valued knowledge, rather than limiting these students to knowledge at a lower conceptual level (Morais & Neves, 2017). While the focus of the current study is in the higher education space, rather than the school space, these discussions on pedagogic codes are still relevant. They also point to the tendency of the current literature to neglect the issue of subject matter in pedagogy. This will be explored in more depth from an online education perspective later in this section.

Morais (2010), also exploring school science, adopts the same mixed pedagogy approach to framing. While it takes time for learners to develop the appropriate recognition and realisation rules, pointing to the importance of weakened framing over pacing, this kind of pacing has always been perceived as too expensive to implement (Morais, 2010). This means that only children with a second site of acquisition, such as the family, have been likely to succeed (Morais, 2010). This author argues that with the correct

teacher training, creative applications of weaker pacing can be implemented in the classroom, and this control over their own time of acquisition is important for students. Morais (2010) argues that framing over selection and evaluative criteria, on the other hand, should be strong, and one way of making evaluative criteria explicit is through feedback on student assignments. Ensor (2004) concurs with this view, arguing that weak framing over selection and evaluative criteria is likely to lead to partial and fragmented realisation on the part of the students. She also adds the view that sequencing should also be strongly framed so as to support students in achieving recognition and realisation rules.

Most authors can agree on the importance of strong framing over evaluative criteria, and making those evaluative criteria explicit. Hoadley & Muller (2010) call this the most crucial aspect of pedagogic practice. The authors also argue for a mixed pedagogy approach, and discuss the importance of weak framing over pacing for access to valuable knowledge (Hoadley & Muller, 2010). Hoadley (2006) reiterates this emphasis on explicit evaluative criteria, and weak framing over pacing.

Bolton (2006) also argues for the importance of explicit evaluative criteria, but this time in the context of high school art in South Africa, which is considered a weakly structured field of knowledge. The author explains that students' work in this subject is often judged on implicit criteria, which are not clearly defined. It is important to establish explicit, specific, and shared criteria for this subject so as to pave the way for equal access for all students (Bolton, 2006).

Muller & Hoadley (2010) also emphasize the importance of strong framing over evaluative criteria, and the creation of explicit criteria, in leading to low differential achievement among children. The hybrid these authors suggest for effective learning also includes weak framing over hierarchical rules, and variable/responsive framing over sequence and pace (Muller & Hoadley, 2010).

Aploon-Zokufa (2013) conducted a study of numeracy classes in South African schools and also found evidence to support strong framing over evaluative criteria, as well as a mixed pedagogic approach. The research concluded that strong framing over evaluative criteria was particularly important for lower-income learners, and for difficult concepts. The study also found that a clear and coherent sequence was important in this context, as a subject like mathematics is not simply a collection of unrelated topics, but rather requires a progression in which new knowledge is built upon the foundation of previous knowledge. The significance of pacing was also discussed in this study. Aploon-Zokufa (2013) uses the concept of opportunity to learn (OTL), which measures what content students are exposed to in the learning environment, to explain that when pacing is slow, OTL is decreased for students who grasp content faster. Overall, the study found that a mixed pedagogic approach, with an emphasis on strong framing over evaluative criteria, resulted in strong performance within schools in low income areas, despite the traditionally poor learner performance in these areas (Aploon-Zokufa, 2013).

Scott, Yeld, & Hendry (2007) also discuss the importance of pacing, but this time in the context of higher education in South Africa. They argue that the diversity found in the South African student body (especially as it relates to inequalities in schooling) calls for differentials in the pace of progression through higher education programmes. These instances of differentials in pacing could take the form of additional programme time for some students, or independent study time, for example (Scott, Yeld, & Hendry, 2007). Shay, Wolff, & Clarence-Fincham (2016) discuss the Council on Higher Education's (CHE) August 2013 proposal for undergraduate curriculum reform in South Africa, which proposes that all

undergraduate degrees and diplomas are extended by one year. They argue that this additional time is essential for foundational learning, particularly for educationally disadvantaged students.

Arasaratnam-Smith & Northcote (2017) make an interesting observation about pace in online learning. These authors argue that instead of trying to replicate aspects of the contact learning environment online, educators should acknowledge the unique affordances and opportunities offered by an online learning environment. One of these unique features of online learning is a concept they call 'time for reasoned response'. Using the example of asynchronous online discussion forums, they argue that students have the opportunity to carefully form their thoughts before sharing them with the group, and that real-time conversation turn-taking skills are obsolete (Arasaratnam-Smith & Northcote, 2017). This is advantageous for students who are either not confident speaking in public for whatever reason, or who are reluctant to interject into fast-paced discussions that are often dominated by a handful of confident and vocal students in a traditional contact class (Arasaratnam-Smith & Northcote, 2017). The authors also argue that because students have time for reflection and can present thoughtful and considered responses to one another, the asynchronous online discussion forum can in fact allow for more in-depth discussions, without the time constraints of a traditional contact class. Lecturers too have time to provide reasoned responses to student questions rather than 'thinking on their feet', and could also provide responses to all student posts - affordances that are also generally not feasible in a contact class (Arasaratnam-Smith & Northcote, 2017).

As is evident from the discussion above, there is no consensus on the 'ideal' when it comes to pedagogical approaches. Most authors do agree, however, on the use of a mixed pedagogic approach, and all agree on the importance of explicit evaluative criteria. Interestingly, the authors whose studies looked at science (Ellery (2017), Morais & Neves (2017), and Morais (2010)) all argued for weaker framing over pacing, and Ellery (2017), Morais (2010), and Aploon-Zokufa (2013), in the context of numeracy classes, argued for strong framing over sequence. These findings could indicate that subjects like science or numerary are better suited to a teaching and learning environment featuring weak framing over pacing, and strong framing over sequence. Hoadley & Muller (2010), Hoadley (2006), Scott, Yeld, & Hendry (2007), and Arasaratnam-Smith & Northcote (2017) also argue for weaker framing over pacing. When it comes to hierarchical rules, Morais & Neves (2017) argued for weaker framing over hierarchical rules, whereas Gamble & Hoadley (2011) found strong framing over hierarchical rules to be optimal. It is important to note that many of these pedagogical decisions are context-specific. There is not necessarily a 'right' or 'wrong' when it comes to framing over certain elements, and what works in one context may not work in another (Hugo, 2013). Some aspects of pedagogy, such as sequence or pacing, are also more significant in certain contexts than others, such as the emphasis on sequence in a mathematics curriculum (Hugo, 2013).

Online learning

When it comes to the study of pedagogy, a contact learning environment is often regarded as the 'norm', and online learning is often positioned as a separate field of study. It is important to acknowledge that in this study, too, the pedagogical concepts discussed in the literature review and conceptual/theoretical framework section describe these concepts primarily within the context of a

‘traditional’ contact learning environment. This section seeks to explore literature pertaining to online learning specifically.

An important aspect of this study involves exploring the affordances and limitations that both contact and online learning environments offer when it comes to these pedagogical approaches. Online learning is often perceived as more independent, more autonomous, and less interactive than face-to-face learning. It is important to remember, however, that the medium or platform itself cannot completely determine the nature of teaching and learning that takes place within it. The agents of the learning environment (teachers, students, policy makers, learning designers, and so on) can manipulate it in ways which best support learning. Not all online courses are necessarily flexible and loosely structured. Many also feature significant engagement, and interaction, among students and instructors. Many traditional, face-to-face courses, on the other hand, feature very little engagement or interaction.

While online education may have been met with a great deal of scepticism in the past, and perceived as an inferior alternative to traditional contact learning, Mitra & Hall (2002) argue that the prevalence of personal computers and access to the internet has facilitated a sophisticated level of interactivity that has changed the landscape of distance education - and they made this argument over 15 years ago. Pedagogy is dependant on interaction between teacher and student and learning technology has allowed this, through the use of online discussion forums, live sessions, webinars, and other synchronous and asynchronous online learning tools (Mitra & Hall, 2002). The online learning environment also gives both teachers and students the opportunity to occupy roles different from those of the traditional classroom. Quiet students may be able to overcome communication anxieties and engage actively in group learning, for example, or teachers may take on the role of a moderator of online discussions, rather than the active transmitter of information to a mainly passive audience (Mitra & Hall, 2002). In fact, the power attached to the teacher has often been the result of the physical structure of the classroom and the hierarchy it imbues, and the online learning environment removes those advantages associated with spatial arrangement, as well as giving students equal speaking capital (Mitra & Hall, 2002). While these authors posit their conceptualisation of the online learning environment as a nonhierarchical context, this study will explore the potential for inclusion of hierarchical elements into this inherently non-hierarchical space.

In his study of ICT-mediated learning in schools, Ingram (2016) presents ICT as a recontextualising field that weakens classification and framing of the discourse, and shifts the teacher away from the centre of learning (as the source of all knowledge and authority), and also disrupts the hierarchical one-to-many relations of the traditional classroom. He argues that ICT-mediated learning can give the student more control over the content, sequence, and pace of their learning.

Badat (2005) discusses distance higher education in general, not online learning specifically, but argues that distance education emphasizes flexible learning, convenience in terms of time and place, and a focus on self-study. He also argues that to facilitate high quality distance education, resources for independent study should be provided, as well as academic support, and formative assessment (Badat, 2005).

Swan (2002) acknowledges that online discussions may not be inherently interactive as a format, but that does not mean that interactivity and engagement cannot be fostered through careful pedagogic decisions. In her research, she found that the frequency, timeliness, and nature of discussion posts, as

well as the social environment created in the online classroom, and the level of instructor engagement and support had a significant impact on interactivity. Swan (2002) explored interaction in online classrooms on three levels – interaction with content, interaction with instructors, and interaction with classmates. It was found that the higher the level of interaction with instructors and classmates, the higher students rated their satisfaction with the course, as well as their perceived learning. Swan (2002) found that, rather than the allowing the online platform to become a barrier to interaction, students in online discussions made up for the lack of affective communication by employing immediacy behaviours in the channels available to them. These behaviours included expressions of emotion, attempts to develop community online, social sharing, and so on. While it is important to explore the potential allowances and limitations of each pedagogic context, the medium itself cannot wholly determine the nature of the interaction. The agents in the pedagogic exchange have the ability to mould the learning environment in ways that suit their needs. This has clear implications for framing. Instructors, for example, need to think about how they can develop and facilitate online courses that foster this type of engagement and interaction.

Chen (2001) argues that transactional distance relates to a pedagogical rather than geographic phenomenon. Transactional distance is defined as a distance of understandings and perceptions that might lead to a communication gap or misunderstanding between student and instructor (Chen, 2001). After recognising a paucity of empirical research addressing factors determining transactional distance, the author conducted a study that found that those students who engaged more in online course discussions reported less transactional distance than those who did not engage as actively. This points to the key role of instructors in creating and facilitating engaging online discussions. Transactional distance is a useful concept in this study, as it suggests that the method of delivery does not determine the level of engagement or interaction on a course. In theory, a contact course could present greater transactional distance than an online course, regardless of the physical distance between students and instructor.

Garrison & Baynton (1987) propose important considerations when designing, developing, and facilitating online courses. They explore the controversial concept of 'independence' in online learning. While independence, in this context, is generally understood to mean the degree of control learners exert over the context and method of their learning, Garrison & Baynton (1987) argue for the more holistic concept of 'control', which is composed of three key elements. Firstly, independence is important in online learning and is the freedom to make choices without influence or restriction of others. Secondly, power is the ability to assume responsibility for one's own learning process with the requisite intellectual ability and skills. Thirdly, support is another key component in 'control', and refers to being equipped with the resources needed to carry out the learning process. This includes access to instructors for guidance. This study touches on the finding that, in each of these three aspects, the learning platform itself cannot determine the amount of student control. The simple fact that a course occurs online does not guarantee independence, for example, as the student may not have the necessary power and support to carry out their learning independently. By the same token, a traditional face-to-face course may not support the student in achieving control over their learning journey either. Again, this has important implications for framing, as these considerations need to be made in the design, development, and facilitation of online courses.

Subject matter

While much of the literature on online education makes quite broad generalisations about its characteristics, affordances, and limitations, little attention is paid to the impact of subject matter. In reviewing the research on interactions among teachers and students in the online learning and higher education environment, Wallace (2010) identifies an important area for future research – exploring the impact of subject matter in online higher education. Wallace (2010) argues that subject matter is an important variable in online courses, affecting how students learn, and how teachers teach, and informing course structure. As Ball (2000) and Shulman (1986) argue, there is a continuous tension or dichotomy in educational research, between pedagogical method, and knowledge of subject matter. Throughout the history of higher education, one approach has been privileged at the expense of the other at any given time, and the two have rarely been meaningfully integrated.

Similarly, Gamble (2014) argues for a renewed focus on knowledge and knowledge structure, especially in the context of a global demand for relevant workplace skills. Using the example of school mathematics, a strongly classified subject that is not common-sense, the author argues that the nature of the discipline should guide how it is assessed, rather than drawing on some general theory of pedagogy that makes no reference to the actual subject matter to be taught. The knowledge structure should thus inform the pedagogical decisions, such as selection, sequence, pace, and so on (Gamble, 2014).

These points are very relevant to the South African school education sphere. Reeves & Muller (2005) explain that the new school curriculum introduced in 2005 integrated formerly separate subjects into eight broad learning areas, such as natural and physical sciences, human and social sciences, and so on. They go on to explain that this new curriculum was based on the concept of outcomes-based education, outlining a number of higher order skills (such as critical thinking and problem solving) that students were expected to acquire, rather than specifying what subject content was to be covered. The curriculum framework also provided little detail on content emphasis, pace, and other aspects of each subject (Reeves & Muller, 2005). Like Gamble (2014), Reeves & Muller (2005) argue for an increased focus on knowledge and knowledge structure. They argue that if the purpose of the curriculum was simply to increase mastery of one or other higher order skills, then it would not matter which topics were covered. They also argue that this lack of focus on actual subject matter can exacerbate learning inequalities.

Also arguing for the importance of subject matter, Barnett, Parry, & Coate (2001) present their theory of the three domains of curriculum. They explain that the knowledge domain refers to discipline-specific competencies, the action domain refers to competencies acquired through doing, and, lastly, the self domain refers to the development of an educational identity. The authors argue that the weighting of each domain varies across different curricula, with science and technology heavily weighted towards the knowledge domain, for example, the arts and humanities weighted towards the knowledge domain, but also integrated with the self domain, and the professional subjects displaying a high degree of integration across the three domains, but often emphasizing the action domain, such as in the development of business strategies based on real world case studies (Barnett, Parry, & Coate, 2001). This theory further supports the continued focus on subject matter, and the rejection of a one-size-fits-all approach to pedagogy.

Stodolsky & Grossman (1995) present a useful framework of five features for characterising different subjects. The first feature is degree of definition. It is important to ask whether there is agreement regarding what does and does not constitute the subject matter, and what the boundaries are. This clearly has implications for classification, as strongly defined subjects will display strong classification, while weakly defined subjects will display weak classification. The next factor is scope – is the subject homogenous or composed of a variety of fields of study? The third factor is the degree of sequence. Some disciplines feature sequential dependencies in which prior learning is perceived as a prerequisite to later learning. In courses with this type of subject matter, stronger framing over sequence would be required in order to enforce a defined sequence. The next feature to consider is whether the subject is characterised as static, or dynamic. Does the subject matter remain relatively constant, or are there continuous developments in the field, of which teachers need to stay abreast? Lastly, it is useful to consider whether the subject has a required or elective status. Exploring teacher conceptions of their subject matter in a high school environment, Stodolsky & Grossman (1995) found that math teachers perceived their subject to be clearly defined, with limited scope, clear sequentiality, and relatively static. English and social studies teachers, on the other hand, generally reported the opposite about their subjects. These concepts are clearly very relevant to considerations of framing.

Conceptual/ theoretical framework

Pedagogy is often mistakenly understood as the unproblematic transmission of knowledge from teacher to taught. This understanding conceptualises knowledge as an independent entity which can simply be passed down from one person to another, in its original form. This conceptualisation ignores the complex process in which knowledge is transformed from its place in the empirical world into a research output, then into a curriculum, and finally into a pedagogic practice. At each step, this knowledge is being shaped by agents in this process, who alter and adapt it for their own purposes.

Bernstein (2000) provides a useful model, referred to as the pedagogic device, which explores the relationships between three levels or fields of knowledge, and how they are interrelated. The pedagogic device comprises the rules and procedures for transforming knowledge into 'classroom talk' (Singh, 2002).

At the field of production, disciplinary discourse is created. An agent transforms aspects of the empirical world into discipline-specific knowledge, primarily through research. The outputs of this research need to meet certain criteria (e.g. those involved in peer review and publishing in a journal, etc.) to become legitimate texts and legitimate disciplinary knowledge within this particular discipline. At this stage, the concern is to enrich the discipline; the focus is not yet on pedagogy.

At the field of recontextualisation, an agent adapts this disciplinary knowledge and moulds it into a pedagogic discourse, such as a curriculum or lesson plan, intended for use in the 'classroom'. This curriculum knowledge is therefore a different entity to the disciplinary knowledge of the previous level. It has been converted into knowledge that is transferable and accessible to students who are not necessarily specialists of the discourse. Generally not everything from the disciplinary discourse is included in the pedagogic discourse. The agent has power in deciding what to include or exclude from

the disciplinary discourse, and how to position this knowledge for the purpose of transmission to students.

At the third level, the field of reproduction, the curriculum knowledge has been enacted as pedagogic practice, which takes place between a transmitter and acquirer. This is the level at which the planned curriculum is taken into the classroom. Again, the agent at this level has some control over how they will enact this curriculum, and how it will change in the actual interaction with acquirers. Certain learning outcomes may be planned for in the field of recontextualisation, but this does not necessarily mean these outcomes will be realised in the field of reproduction.

When transitioning from one level to the next, a discursive gap presents itself. As mentioned above, the agent at each level has some degree of control over how knowledge is transformed and repackaged. This means that the knowledge present in the field of production will not be the same as at the field of recontextualisation, and so on. The pedagogic device can be described as a translation device, translating knowledge from one field to the next, for different purposes. Singh (2002) refers to recontextualising rules – the rules for delocating a discourse, relocating it, and then refocusing it.

Gamble (2014) describes the three knowledge systems that Bernstein presents, through which formal educational knowledge is realised. The curriculum defines what counts as valid knowledge, pedagogy defines what counts as valid transmission of knowledge, and, lastly, evaluation defines what counts as valid realisation of this knowledge.

While the pedagogic device presents a useful framework for describing the recontextualisation of knowledge from one level to another, these structures and characteristics vary based on the unique context. Bernstein proposed two fundamental concepts, intended to analyse the underlying structure, and embedded characteristics of the pedagogic device – namely classification and framing. Classification refers to the degree of boundary maintenance between entities, and the strength of insulation of boundaries (Sadovnik, 2001). Framing is concerned with the control on communication in interactional pedagogic relations (Bernstein, 2000). Both concepts can illuminate potentially unspoken or unrecognised forms of power and control in the pedagogic device.

Hoadley & Muller (2010) explain how the concepts of ‘power’ and ‘control’ are relevant to discussions on classification and framing. These authors refer to classification as the organisational aspects of pedagogy and how power is activated, and framing as the interactional aspects of pedagogy, concerned with who has control over various elements within the pedagogical context (Hoadley & Muller, 2010). This distinction between power and control describes the making (power) and potential unmaking (control) of the social reproduction of inequality (Hoadley & Muller, 2010).

Classification examines the relations between categories (Bernstein, 2000). The stronger the classification, the more clearly defined are the boundaries between categories, and the more things are kept separate and distinct. The weaker the classification, the more fluid and fragile those boundaries are, allowing categories to interact to some extent. While one category can be relatively stronger or weaker than another, Bernstein proposed that, in principle, a category would tend to either separation or integration.

Strong classification is generally associated with specialisation, as a category is distinct and separate from others. This specialisation is created through the relation to something else. X is specialised

because it is understood as distinct and separate, in relation to Y (Bernstein, 2000). In the case of strong classification, each category has its own unique identity, voice, and internal relations (Bernstein, 2000). In the case of weak classification, categories possess less specialised discourses, identities and voices (Bernstein, 2000).

When analysing the curriculum at the field of recontextualisation, classification gives rise to two types of pedagogic code. When categories are strongly classified, the curriculum is understood as a collection code, in which it is separated into highly differentiated, distinct subject areas or topics (Sadovnik, 2001). When categories are weakly classified, the curriculum is understood as an integrated code, where the boundaries between subject areas or topics are fragile, and there is integration between the different categories.

Drawing on Bernstein's work, Hoadley (2006) discusses three levels of classification, namely, relations between discourse, relations between spaces, and relations between agents. Relations between discourse could refer to the inter-discursive - the strength of boundary between the subject area under study and other subject areas - or intra-discursive - the strength of the boundary between the subject under study and everyday knowledge. Referring to relations between spaces, Hoadley (2006) discusses the strength of demarcation between spaces used by teachers and spaces used by learners. These spaces can be quite evident in traditional classroom settings which contribute to a hierarchical relationship between teacher and students. Relations between agents refer to the strength of demarcation of pedagogic identities (Hoadley, 2006). Is the teacher the sole transmitter of knowledge, or can students take a more active role in their learning?

While classification is concerned with the relations *between* categories, framing is concerned with the relations *within* categories. As discussed previously, framing explores which agent – the transmitter or the acquirer – holds the decision-making power over five elements, namely selection, sequencing, pacing, evaluative criteria, and hierarchical rules. The stronger the framing, the more explicit control the transmitter has over these five elements (Bernstein, 2000; Bernstein, 1990). The weaker the framing, the more apparent control the acquirer has over these five elements (Bernstein, 2000; Bernstein, 1990).

Selection refers to the kinds of content and knowledge chosen as part of the course. Sequencing is the order in which elements are accessed and knowledge is built. Pacing refers to time allocated to tasks and how strictly this is enforced. Evaluative criteria refer to the evaluation methods used to assess student learning. Lastly, hierarchical rules refer to the degree of openness and the aspects of hierarchy present in relationships between teacher and student.

These five elements can be further classified as either regulative discourse (RD) or instructional discourse (ID). ID refers to the selection, sequencing, pacing and evaluative criteria of the knowledge (Bernstein, 2000). RD refers to the hierarchical rules at work in the pedagogic setting, specifically the hierarchical relationships between transmitter and acquirer (Bernstein, 2000). RD refers to the expectations regarding conduct, character, and manner in the pedagogic setting (Bernstein, 2000). Bernstein asserts that ID is always embedded in RD, and therefore RD always dominates ID (Morais, 2010; Muller & Hoadley, 2010). This study will explore both ID and RD and the relationship between the two.

Framing has a very real effect on the experience of the student. Where framing is strong, the pedagogic practice is likely to be visible and explicit (Bernstein, 2000). In other words, students are likely to have a

clearer and more explicit understanding of what counts as a valid realisation of knowledge in this context, and how this can be achieved. Where framing is weak, the pedagogic practice is likely to be invisible or masked to some extent, making the rules of RD and ID implicit and largely unknown to the student (Bernstein, 2000). It is therefore unclear to some students what counts as a valid realisation of knowledge, making it difficult for a student to achieve this if they do not know or cannot read the tacit cues or implicit requirements of the pedagogic practice. Much of a student's success in a university environment rests on their ability to adopt an elaborated code.

Sadovnik (2001) describes the distinction between restricted and elaborated code and its implications for social reproduction. Restricted code, often associated more strongly with the working class, is context-dependent and particularistic. Restricted code deals with implicit and contextual meanings, and is associated with students' recognition and realisation of context-dependent meanings (Hoadley & Muller, 2010). Elaborated code, on the other hand, generally associated with the middle class, is explicit, context-independent, and universalistic. It is associated with students' recognition and realisation of these context-independent meanings (Hoadley & Muller, 2010). For success in most university-level courses, including the courses under discussion here, access to an elaborated code is required.

Bernstein acknowledged that different disciplines structured knowledge in different ways, having important implications for pedagogy, which is relevant to this study, given its focus on subject matter. Bernstein (2000) conceptualises two forms of discourse – horizontal and vertical. Horizontal discourse refers to everyday, common sense, local knowledge that is generally shared by a community, and is therefore location and context specific. This type of discourse is typically informal, and often oral rather than written in nature. Vertical discourse, on the other hand, refers to official, formal knowledge of an institution, usually in a formal educational context.

Bernstein (2000) then further unpacks the concept of vertical discourse by arguing that vertical discourse can be structured in two contrasting ways – hierarchically and horizontally. Hierarchical knowledge structures refer to coherent, systematically principled knowledge structures. This type of structure is built on general propositions and theories as its foundation. Students need to master these foundational concepts at lower levels, before they can progress, integrating more complex and abstract forms of knowledge as they explore the field. Mathematics is a good example of a hierarchical knowledge structure in which it is imperative that students grasp foundational concepts before they can understand more complex concepts. The accounting section of the Managerial Finance course under study can also be characterised as a hierarchical knowledge structure, as each new section builds on previous concepts and foundational accounting theory. Hoadley & Muller (2010) argue that subjects that fall within this type of knowledge structure are likely to place a great deal of emphasis on sequence, as students need to learn long sequences of hierarchically related concepts. This also ties in with Stodolsky & Grossman's (1995) identification of 'degree of sequence' as one of the important features used in characterising different subjects. We can therefore argue that hierarchical knowledge structures, like the accounting section of the Managerial Finance course under study, feature sequential dependencies that are best realised in learning environments featuring strong framing over sequence.

Horizontal knowledge structures, on the other hand, are made up of a number of discrete languages, developed independently rather than in a hierarchy. It is a series of specialised languages with specialised modes of interrogation and criteria. Bolton (2006) gives the examples in art of classicism,

romanticism, and realism, for example. While these languages fall within the same broad disciplinary field, they are not necessarily interrelated and do not necessarily refer to one another.

Description of programme and courses under study

For this study, two courses within a postgraduate qualification were analysed. The Postgraduate Diploma in Management (specialising in Marketing) is a NQF level 8 programme offered through the Commerce faculty at one of South Africa's public universities. The one-year qualification is comprised of twelve courses. While students do have the option of choosing two of their electives, the two courses under study are compulsory for this programme. The programme aims to equip students with the necessary skills and competencies for a career in marketing management. The programme is applied in nature, and many of the courses require students to present practical solutions to case study problems within the field of practice.

In 2015, the Postgraduate Diploma in Management (specialising in Marketing) was offered in online mode for the first time, through a private online education service provider. The online programme offers the same qualification with the same courses, but this version is a two-year, part-time programme, as opposed to the full-time, one-year programme offered on campus. Other than optional orientation sessions at the beginning of the programme, this programme is offered completely online. Exams are written at approved exam centres across South Africa, and Africa, so students are not required to be physically present at the university.

Both versions of the programme have the same entrance requirement of an undergraduate degree in any field, but the online programme makes provisions for a larger constituent of Recognition of Prior Learning (RPL) students. Because the online programme is targeted at working professionals who wish to formalise their professional experience, there are a number of students on this programme who have many years of experience in the field, but may not have a formal university qualification. The RPL applicants are required to complete a short course which equips them with necessary skills, such as academic writing and referencing, and then to complete a quiz and short essay. If their performance on these assessments is deemed satisfactory, they are admitted to the programme.

The contact courses are taught by one or more lecturers. These lecturers are responsible for creating the course content and assessments, teaching the lectures , and marking and moderating the assessments. In some cases, such as the Managerial Finance course under study, the course also features tutorial sessions which are run by tutors. These smaller classes offer students the opportunity to consolidate work from the lectures and receive further guidance. The tutors also assist in marking assessments.

The online courses are taught by facilitators. These facilitators liaise with the on-campus/residential lecturers regarding the learning outcomes, content, and assessments of the courses, and then work with a team of learning designers and learning technologists to adapt the current course content for an online learning environment. Once the course content has been prepared and the course goes 'live' to students, the facilitators engage with students on the discussion forums and in live sessions (such as webinars or live tutorials), and mark and moderate student assessments. The facilitators are often

supported by tutors or assistant markers. The tutors assist on the discussion forums in addressing student posts, as well as marking, while the assistant markers do not engage with students, but only work on marking.

The Introduction to Marketing course is a prerequisite for the other marketing courses on the programme (such as Consumer Behaviour, Integrated Marketing Communication, Retail & Services Marketing, etc.), and serves as a foundation in the marketing discipline, introducing students to concepts such as buyer behaviour, the marketing mix, marketing strategy, and so on.

The Managerial Finance course is designed to provide students with little or no commercial or financial background with a general introduction to the study of the financial function in business, especially as it relates to the South African context. The key areas of study in the course are finance, management accounting, and accounting.

These two courses were selected as they make for a strong comparison. The Introduction to Marketing course is a qualitative course, whereas the Managerial Finance course is primarily quantitative. The assessments reflect these differences, with students being assessed on their ability to present holistic, and well-integrated essays for the Introduction to Marketing course, with no single 'model answer', based on often quite open-ended marking rubrics. The Managerial Finance course, on the other hand, requires students to record accounting entries and calculations, with a clear and single 'model answer' in a detailed marking rubric.

To restrict the scope of this study, only one topic/section from each course was studied. The 'segmentation, targeting, and positioning (STP)' section of the Introduction to Marketing course was selected. This section of the course provides a framework for students to segment the broader consumer market, select one or more appropriate target markets at which their marketing efforts are directed, and create a strong position for their brand, product, or service within this market. This is a key section of the course and informs other sections, as well as other marketing courses offered later in the programme. The 'adjustments and annual financial statements' section of the Managerial Finance course was selected. This section of the course equips students with the skills needed to record accounting entries, specifically related to accruals, adjustments, and depreciation. This is also a major section of the course, and features much of the quantitative content that was the focus of this study.

Research questions

While a few authors, including Ball (2000), Shulman (1986), Gamble (2014), and Barnett, Parry, & Coate (2001), have pointed to the importance of subject matter as a variable in the pedagogic environment, few have explored the implications for online learning specifically. Are certain subjects better suited to a particular type of learning environment? How can one adjust the level of framing in either an online, or contact classroom to better support students?

While various authors, including Aploon-Zokufa (2013), Ellery (2017), Gamble & Hoadley (2011), Hoadley (2006), Hoadley & Muller (2010), Morais (2010), and Morais & Neves (2017), point to the importance of mixed framing in supporting students in their learning environments, this study will explore whether these findings are as pertinent in one type of subject matter setting as in another, and what role the

actual learning environment plays. This study looks at the five dimensions of framing in each context – sequencing, pacing, hierarchical rules, selection, and evaluative criteria. It also explores two dimensions of classification in each context - classification between theoretical knowledge and examples, and classification between different sections of the course.

The key research question of this study is:

> *What are the affordances and limitations of both the online and contact learning environments in relation to different types of subject matter in the courses under study?*

To address this question, four sub-questions were addressed first:

- What is the relationship between mode of education, subject matter, and framing?
- What is the relationship between mode of education, subject matter, and classification?
- Are there any differences in the framing and classification present between different modes of education (online and contact)?
- Are there any inconsistencies in the framing and classification present in the course content vs. the assessments?

Based on these findings, we can address the key research question of this study, and establish the affordances and limitations of both the online and contact learning environments.

As this is a comparative study, I aim to establish how framing and classification differ between different types of subject matter, as well as different teaching modes. Another important point to consider is whether the framing and classification in one learning environment can be incorporated into another.

Research design & methodology

A comparative research design has been used for this study (Bloemraad, 2013). The online and contact formats of two courses have been analysed. Not only have comparisons been made between the same course in different delivery modes, but also different courses in the same delivery mode, as illustrated in Table 1 below. The analysis was restricted to two modules from the Introduction to Marketing course, and one module from the Managerial Finance course. These modules were selected on the basis of their ability to reflect the qualitative and quantitative concepts typical of each course, and their importance in the assessments. For each module, these comparisons illustrated in Table 1 below have been made in relation to classification and framing.

Table 1: Levels of comparison in the study

	Online	Contact
Introduction to Marketing (Section: Positioning)	**A**	**B**
Managerial Finance (Section: End of period adjustments)	**C**	**D**

A, B, C, & D represent the four different courses under review, classified by the mode of delivery.

- C & D were compared to explore how the Managerial Finance course is presented online, and in contact format.
- A & B were compared to explore how the Introduction to Marketing course is presented online, and in contact format.
- A & C were then compared to explore how two types of subject matter are presented in an online learning format. Lastly,
- B & D were compared to explore how two types of subject matter are presented in a contact learning format.

Flick (2011) explains that sampling in qualitative research is generally not concerned with formal selection, such as random sampling, but rather on the collection of deliberately selected cases that can provide a wealth of empirical examples of a phenomenon of interest. Maxwell (2012) reiterates this point by explaining that qualitative research makes use of purposeful sampling, and that its value often lies in its lack of generalisability. Unlike quantitative research where the generalisability of findings is based on explicit sampling of a defined population, the results of which can be extended to the broader population, qualitative research focuses on what is termed 'analytic' generalisation, where theories are developed that can be extended to other contexts (Maxwell, 2012). Qualitative studies often set out to understand small, specific contexts and attempt to preserve the individuality of the analysis (Maxwell, 2012).

As discussed previously, the research sample comprises one topic/section from the Introduction to Marketing course, and one topic/section from the Managerial Finance course. These two courses form part of the postgraduate diploma, which includes a total of thirteen courses. Given the limited scope of the study, and given the desire for in-depth analysis, only two courses out of the thirteen were selected for this study. These two courses in particular were selected purposefully given their potential for rich comparison in that the Introduction to Marketing course exemplifies a qualitative course on this programme, while the Managerial Finance course exemplifies a quantitative course. In this way, the study incorporated purposeful sampling.

For the online courses, data was collected through the retrospective analysis of completed courses. All data analysed for these online courses, including all course content, discussion forum interaction, and recordings of the live sessions was still available online and, therefore, the fact that the courses had already been completed did not impact data collection. Module 6 and 7 of the Introduction to Marketing course and Module 3 of the Managerial Finance course were analysed based on their suitability in

exemplifying qualitative and quantitative content respectively. All of the learning material, student/instructor interaction, and student/student interaction was already stored online.

The researcher observed the various elements of the courses, including the course layout, learning material, class and small group discussions, and live tutorials, and then analysed these in terms of their classification and framing dimensions. Through this analysis, the level of framing for each factor was determined, along with the level of classification present. There are a number of units of analysis, including student and tutor discussion posts, online learning material, live tutorial session recordings, assignment instructions, test papers, and marking rubrics. Within the observation of these elements, the focus was on how the facilitator and learning environment contributed to the framing and classification present.

The data produced during observation of the online modules can be found in Appendix 2 (Introduction to Marketing), and Appendix 4 (Managerial Finance). Each module is introduced in these notes, with an outline of that module and its structure, including a table summarising its various elements. Each module is broken down into two to three units, and each of these units contains a number of learning components, such as videos, readings, or discussions. In the observation notes each component is described in detail. At the end of each set of field notes, some initial observations and analyses relating to the various aspects of framing and classification are recorded.

For the contact courses, data was collected through observation of lectures. Four Managerial Finance lectures and three Introduction to Marketing lectures covering the chosen sections of content during the first semester of 2018 were observed. Field notes were taken during these sessions, and later analysed to determine the framing for each factor, as well as the classification present. The focus of these observations was on how the lecturer and learning environment contributed to the framing and classification present. In addition to the classes observed, lecture slides and handouts were also considered as well as test papers, assignment briefs, and marking rubrics. A number of unstructured, informal discussions were also conducted with the lecturers after the lecture sessions. Notes from these discussions were included in the field notes of the respective session.

The field notes for the contact lectures can be found in Appendix 1 (Introduction to Marketing) and Appendix 3 (Managerial Finance). The field notes describe each 45 minute lecture in detail, including any observations that occurred before or after the class, including informal chats with the lecturer. The field notes are broken down into 5-minute block segments. At the end of each set of field notes some initial observations and analyses relating to the various aspects of framing and classification were recorded. These informed the findings of the study.

There are various references to the field notes throughout this study, most frequently in the findings section. The key to these references is explained below:

MF[C] = Managerial Finance contact

MF[O] = Managerial Finance online

ITM[C] = Introduction to Marketing contact

ITM[O] = Introduction to Marketing online

The following two codes apply specifically to the contact courses:

L[1] = Lecture 1

S[1] = Section 1

The following three codes apply specifically to the online courses:

M[1] = Module 1

U[1] = Unit 1

C[1.1] = Component 1.1

Here are two examples of codes and their full meanings:

MF[C] L[3] S[8] = Managerial Finance contact, lecture 3, section 8

ITM[O] M[6] U[1] C[3.8] = Introduction to Marketing online, module 6, unit 1, component 3.8

The assessments for each course, and their marking rubrics, can be found in Appendix 6 (Introduction to Marketing contact assessment and marking rubric), Appendix 7 (Introduction to Marketing online assessment), Appendix 8 (Introduction to Marketing online assessment marking rubric), Appendix 9 (Managerial Finance contact test), Appendix 10 (Managerial Finance contact test marking rubric), Appendix 11 (Managerial Finance online test), and Appendix 12 (Managerial Finance online test marking rubric). The tables in Appendix 5 also provide an overview of some of the key features of these assessments.

This research is descriptive in nature. As Wisker (2008) explains, descriptive research is concerned with finding out more about a phenomenon and capturing it with detailed information. While the findings are generally quite specific to a particular case study, they do help us understand more about the phenomenon in general (Wisker, 2008). The findings regarding the contact and online courses that are used as case studies are potentially relevant to other research settings concerned with similar topics.

Creswell (2012) describes data analysis in qualitative research as consisting of preparing and organising the data for analysis, then reducing the data into themes through a process of coding and condensing the codes, and finally representing the data in figures, tables, or a discussion. This section has described how the data was collected and categorised. However, as is consistent with a Bernsteinian methodology, the analysis is structured around an external language of description (ELoD) (Bernstein, 2000). A language of description is described as a translation device whereby one language is transformed into another (Bernstein, 2000: 132). Bernstein differentiates between an internal and external language of description; the internal referring to the syntax whereby a conceptual language is created, and the external referring to the syntax whereby the internal language can describe something other than itself (Bernstein, 2000: 132). Bernstein argues that the ELoD translates empirical relations

into conceptual relations (Bernstein, 2000: 133). The development and definition of the ELoD for this study is described in the External Language of Description section; the findings based on the ELoD are presented in the Findings section and, finally, the discussion section provides an interpretation of these findings.

Maxwell (2012) suggests that, in qualitative research, data analysis should be conducted simultaneously with data collection so that the researcher can progressively focus their observations and decide how to test emerging conclusions. After each lecture, field notes were refined and re-written before the next lecture took place. The findings from the field notes were categorised according to the various aspects of framing and classification, and an argument was presented on whether these observations indicated strong or weak of either framing or classification. This would then inform the proceeding observations, so that data collection and analysis were happening simultaneously.

The research questions were laid out in the previous section, and are as follows:

The key research question of this study is:

> *What are the affordances and limitations of both the online and contact learning environments in relation to different types of subject matter in the courses under study?*

The sub-questions are:

- *What is the relationship between mode of education, subject matter, and framing?*
- *What is the relationship between mode of education, subject matter, and classification?*
- *Are there any differences in the framing and classification present between different modes of education (online and contact)?*
- *Are there any inconsistencies in the framing and classification present in the course content vs. the assessments?*

To answer the first two sub-questions, an external language of description was created based on Bernstein's concepts of classification and framing, and the data collected was analysed and categorised/coded based on this external language of description. Once coded into tables, the researcher could identify relationships between mode of education, subject matter, and either framing or classification. Once all the data had been coded, the third and fourth sub-questions were addressed by identifying any differences and inconsistencies in the codes. Finally, the key research question of the study could be answered by drawing out potential affordances and limitations of the two learning environments based on the relationships present in these codes.

This study purposefully avoided drawing any conclusions on causality in terms of the relationship between the nature of the learning environment and student performance or results, rather focussing on a descriptive exploration of the learning contexts. As pointed out by Isaac & Michael (1995), descriptive research does not necessarily seek to explain relationships, test hypotheses, or make predictions, which was beyond the scope of this study. By considering the assignments and tests, as well as their accompanying marking rubrics, potential affordances and limitations of the two teaching modes could be identified, without making conclusive statements about the causal links between teaching mode and student performance. These broad findings about affordances and limitations could inform

future design and development of both contact and online programmes, with a focus on supporting students in gaining the required recognition and realisation rules.

Lincoln & Guba (1985) and Maxwell (2012) recognise the limitations in trying to discuss qualitative research using the traditional methodological categories created with quantitative research in mind. Lincoln & Guba (1985) introduce the concept of 'trustworthiness' as an alternative to the concepts of validity and reliability that are better suited as criteria for assessing quantitative research. While in quantitative research statistical generalisability would indicate the external validity of research, in qualitative research the concept of *transferability* is more appropriate. Lincoln & Guba (1985) argue that it is not up to the researcher to infer transferability of their study's findings to other contexts. Rather, this burden of proof falls on future researchers who are hoping to apply the original study's findings to new contexts. The responsibility of the researcher, however, is to provide the rich empirical evidence that would make it possible for other researchers to determine the contextual similarity of their proposed setting to the researcher's setting.

As discussed earlier, the two courses selected for this study were selected because they displayed two very different types of subject matter and two very different methods of assessment. Of course Managerial Finance is not representative of every quantitative-focussed subject with a clear rubric and model answer for assessment, however it does illustrate features of subject matter that are more quantitative in nature. Similarly, Introduction to Marketing is not representative of every qualitative-focussed subject with an open-ended rubric and a focus on holistic, well-integrated essays but it does illustrate features of typical qualitative subject matter. In this sense, the findings are not necessarily transferable to all subjects or courses. In the same vein, the contact courses studied here are not representative of every form and manifestation of traditional contact education, nor are the online courses studied here representative of every form and manifestation of online education. It is clear that the online courses studied here are very different from MOOCs, for example. Nonetheless, there are principles that can be transferred to similar subjects and modes if done with care.

The purpose of this study, therefore, is not to draw out specific, generalisable findings that are applicable to all contexts, but rather to identify potential affordances and limitations of both contact and online learning environments with respect to different types of subject matter. While further studies may focus on different subjects or different course formats, the general findings here regarding affordances and limitations of different modes could be helpful in informing both online and contact teaching and learning interventions.

In order to ensure the rigour and credibility of the study, much attention was paid to a detailed external language of description. Detailed descriptions, as well as examples from the data were provided for each dimension of framing and classification. In observation studies, rich data are the product of detailed, descriptive note-taking, which makes it difficult for the researcher to produce data that supports a mistaken conclusion, or to restrict observations so that what the researcher observes supports only their conclusions (Maxwell, 2012). As discussed above, detailed field notes were taken throughout the lectures, and after each lecture these notes were neatened and refined, and an analysis of the observations were recorded.

The researcher's position has implications for the research given the assumptions, preconceptions, and values that the researcher may bring to a study. As I have worked on both the online and contact

versions of the programme under study it is important that I acknowledge my positionality and the potential implications for the research. As an 'insider' in the research setting, one could argue that I would not be able to gain the same level of objectivity as an outside researcher, and that I would rely on tacit assumptions in my research that are not critically explored. In the next few paragraphs I discuss these challenges and how they were addressed, as well as how my positionality actually contributed positively to the research.

Traditionally in research, and in quantitative research in particular, the researcher's own theories, values, or preconceptions were perceived as a 'bias', the influence of which the researcher should attempt to eliminate, or risk the threat to the validity of the study (Maxwell, 2012). Many academics have now come to appreciate the role of the researcher's identity and experience, and the value and insight that it can bring to the research. This is not to say that a researcher should impose their own assumptions uncritically to their research, but rather they should be conscious of how this impacts the research process (Maxwell, 2012). Maxwell (2012) makes the distinction between researcher bias, and reactivity, as another threat to 'validity' in qualitative research design. Reactivity is the effect of the researcher on the participants within the study, but Maxwell (2012) notes that for observation studies, reactivity is generally not a serious threat to validity.

In addressing these concerns of researcher bias, it was important to consider an additional layer of complexity in this particular study as it involved insider research. Insider research, also referred to at times as self-ethnography, is a study in which the researcher has natural access to the research setting as a member and active participant (Brannick & Coghlan, 2007). Brannick & Coghlan (2007) go on to explain that it is becoming increasingly common for individuals participating in academic programmes, particularly on a part-time basis in conjunction with full-time employment, to select their own work setting as the setting for their research. This was the case in this study as I have worked both on the online and contact versions of this programme as a facilitator and lecturer. I have also had professional relationships with the participants of the study. Brannick & Coghlan (2007) explain that the commonly held view is that it is not wise for a researcher to conduct a qualitative study in a setting where they are employed, as the dual roles of investigator and employee are incompatible. It is believed that these researchers are 'too close' to the data to gain the necessary distance and objectivity required for valid research, and they run the risk of relying on assumptions, where other researchers may probe further or seek alternative explanations (Brannick & Coghlan, 2007).

Brannick & Coghlan (2007) argue, however, that researchers working in that setting, and being 'native' to it, will possess insights based on lived experience, as well as rich and complex knowledge of the context. The authors also argue that the insider researcher is able to acquire understanding 'in use' rather than the reconstituted and detached understanding of an observer, as these researchers are already immersed in the organisation and have an understanding of it from an actor's perspective (Brannick & Coghlan, 2007).

This of course requires reflexivity, as discussed. It is important to articulate tacit knowledge that has become embedded due to socialisation in the organisation, and reframe it as theoretical knowledge (Brannick & Coghlan, 2007). I found that I needed to keep reading through my work and trying to look at it from the perspective of an 'outsider', especially when it came to the online courses, as this is a learning environment with which I am very familiar, but I know that many people have had no exposure to it.

Brannick & Coghlan (2007) add that the other opportunities associated with insider research include the fact that the researcher can use internal jargon when making their inquiries, and can draw on experience and familiarity when asking questions, allowing for richer data. I certainly found that this was beneficial in my informal conversations with the lecturers. Because I was already so familiar with their learning environments, I could engage with them in a meaningful way and extract the information I needed from these exchanges quite easily.

I felt that the insider researcher perspective of my study added value overall. It was helpful that I was already familiar with both the online and contact learning environments, and some of the important characteristics of each setting. This meant that I did not have to spend additional time and effort understanding these contexts as a newcomer. While some academics may see contact education as the 'default' and online education as the 'other', I was able to approach the research from a unique perspective, having been exposed to the vast potential of online education as my primary work environment. I already had an intuitive understanding of the differences and similarities between these two modes of education and the possible reasons that one mode would be better suited to a certain type of subject matter compared to another, and this informed my research questions, even if they were not fully defined upfront.

Limitations of the research

One of the limitations of the research involves the comparative research design. 2016 was the final year in which new registrations were accepted for the online version of the postgraduate diploma, thus all observations of the programme are retrospective. This does not present a major barrier as most of the course is asynchronous in any case. While courses A & C are the same cohort, as well as B & D, the study compares the online class of 2016, with the contact class of 2018. The internal comparisons therefore reflect the same cohort, while the comparisons between the online and contact format reflect different cohorts. The ideal would have been to compare the same cohorts (i.e. online class of 2018, with contact class of 2018).

It is also important to recognise that categorising a discussion post on an online discussion forum, or a vocal exchange between a lecturer and a student, is up to interpretation. While the categories themselves have been carefully defined in the external language of description section, simply choosing the categories involves subjectivity and interpretation from the researcher. I have had to be aware that my understanding of the course elements is affected by my own knowledge and beliefs, as well as my past educational experiences.

I am personally involved in the research context as I have worked on both the online and contact versions of the programme. It therefore required awareness and consideration to create a clear

distinction between the courses as a research setting, and the courses as a work environment. As an instructor, I also need to recognise my position of power in these spaces, which requires careful and considered epistemological vigilance (Bourdieu, Chamboredon & Passeron, 1991). The complexities of insider research have been discussed above.

Another limitation of the study is the issue of transferability, as discussed above. While it is not the intention of the research to present findings that could be transferred to any and every course, it is important to note this explicitly. These are four postgraduate courses, within one faculty, in one South African university, and are therefore not representative of all types of courses or subject matter. It is also important to note that both contact and online learning take many forms. The MOOCs referred to earlier, for example, are characterised by minimal to no student support or instructor engagement, whereas the current online courses under study happen to be interactive, and accompanied by extensive instructor support. The findings made here about online learning therefore cannot be transferred to all forms of online learning.

As discussed above, it is important to recognise that the subject matter under study is unique to this particular programme. Distinctions are often made in education between subjects that are more quantitative or qualitative-focussed, and what that implies about the teaching and learning required. While in this case Introduction to Marketing is more qualitative, and Managerial Finance is more quantitative, these courses do not represent all types of subject matter. The content and pedagogy of Managerial Finance, for example, can differ greatly from that of Mathematics, just as the content and pedagogy of Introduction to Marketing can vary greatly from that of English Literature or Sociology.

Ethics

The study received ethical clearance from the School of Education Ethics Review Committee of the Faculty of Humanities, and conforms to the requirements of ethical research as laid out in the Humanities Guide for Research Ethics. The ethics clearance letter can be found in Appendix 13.

When considering potential sources of 'harm' for the participants of this study, the impact of the research on the lecturers and facilitators, as well as the students, was assessed. It was important to ensure that participants maintained their autonomous right to self-determination (Barrow & Khandhar, 2019). Not only did participants need to understand the voluntary nature of participation, but they also needed to be informed regarding the nature and objectives of the study (Barrow & Khandhar, 2019). Without complete information, a potential participant cannot make a truly informed decision (Barrow & Khandhar, 2019). All academic staff involved in the study completed consent forms detailing the purpose of the research, and asking their consent to observe their classes. The consent form for academic staff can be found in Appendix 14. While the consent form does state that the purpose of the research is not to critique or evaluate individual lecturer performance, the research does explore teaching and learning in these settings, of which the lecturers are a key part. It was therefore important that they were informed of the purpose of the research, as well as having the right to anonymity. The names of the academic staff are not included in the study. For ease of readability, the lecturers are referred to with male pronouns and the facilitators with female pronouns. This does not necessarily reflect the gender of the actual participants.

In one of the lectures, I briefly carried out a verbal introduction to my research, and a consent form was handed out for students, detailing the purpose of the research and making them aware that lectures would be observed, and asking their permission to include their completed assessments as part of the research. This student consent form can be found in Appendix 15. Upon further refining the research topic, it was decided not to include the actual student submissions themselves, so this data was not used. While students are referred to in the field notes in terms of their interaction with the lecturer, no names or demographic information are included. The names of the institutions were also anonymised.

There were no major ethical concerns related to this research as the observation of lectures and online learning material has no foreseeable negative impact on students.

External Language of Description

As discussed in the conceptual/theoretical framework section, Bernstein's concept of framing explores the relations within categories. It is useful to consider which agent – the transmitter or the acquirer – holds the decision-making power over five elements, namely selection, sequencing, pacing, evaluative criteria, and hierarchical rules. The stronger the framing, the more explicit control the transmitter has over these five elements (Bernstein, 2000). The weaker the framing, the more apparent control the acquirer has over these five elements (Bernstein, 2000).

The theory also suggests that where framing is strong, the pedagogic practice is likely to be visible and explicit. Where framing is weak, the pedagogic practice is likely to be invisible or masked to some extent.

Most authors recommend a mixed pedagogy of strong and weak framing over various elements in order to support students in mastering the recognition and realisation rules, as discussed previously. While there is some disagreement regarding which elements should be strongly framed and which should be weakly framed, most authors agree on the importance of explicit evaluative criteria.

While the literature indicates a single concept under 'framing' of evaluative criteria, my data suggests that two aspects are being conflated. My data has revealed two important dimensions to the framing of evaluative criteria, and it is worth making the distinction between the two:

- The control over evaluative criteria (whether this is transmitter/lecturer or acquirer/student control)
- The relative clarity and transparency of evaluative criteria (whether these criteria are implicit or explicit)

My data has revealed that these two dimensions can sometimes be inconsistent – i.e. one dimension can be strongly framed while another is weakly framed. Because a lecturer exerts strong control over evaluative criteria does not mean they make these criteria explicit to their students. The lecturer may choose not to reveal the evaluative criteria to students or may not be aware that evaluative criteria are not explicit to students. By the same token, a case in which students play a more active role in determining evaluative criteria does not necessarily equate to weakly defined or implicit evaluative criteria.

For this study I have therefore utilised two dimensions for the analysis of framing over evaluative criteria (implicit/explicit and student vs. lecturer control). The implicit/explicit dimension is represented in Table 3 below. For sequence, pace, and selection (and evaluative criteria again) I have only looked at one dimension - control (student vs. lecturer). For the hierarchical rules section I have used a slightly different set of codes, the need for which will be explained below, and further defined in Table 4.

My data has revealed another interesting feature of framing. When it comes to control, it is tempting to state that either the lecturer or student exerts control over the various aspects of the course. In the case under study it seems that the student can exercise their agency in various ways. The structure of the online courses under study is set up to guide students through a clear learning path. Activities are sequenced, time allocations are suggested, and content is chosen. The student does, however, have a certain amount of agency and independence within the online course to shape their own learning experience. While a sequence or time allocation may be suggested in the learning path, for example, it is ultimately up to the student to decide on how they will approach the course content. These actions do not affect the other students within the class. If student A decides to spend 5 minutes watching a lecture video, for example, this does not prevent student B from taking one hour to watch that same lecture video. Students have significant autonomy within the online course that is difficult to mirror in the contact learning environment.

The contact course, on the other hand, is not as flexible, but there are still ways in which students can exert control over the various aspects of the course, even within certain confines. A lecturer in a traditional contact course is generally expected to take accountability for elements of the course such as pace or sequence. Students can, however, exercise their power by asking a number of questions, bringing in their own examples, or making requests of the lecturer. Depending on the hierarchical relationship in place, these actions can impact various aspects of the course and could have a potentially disruptive effect. Unlike the online course, this impact is felt by all students as there is less scope for 'independent learning' in the traditional classroom. Many of the teaching and learning activities in the contact class are experienced as a group. If a group of students in the class are continuously asking questions because they do not understand the content, for example, this could slow down the pace of the lesson, even for those students who do understand it, and would prefer to go through the content at a more rapid pace. I have tried to represent these various avenues of control in Table 2 below.

Framing Codes: Descriptions

Table 2: Framing: selection, sequence, pace, and evaluative criteria (student vs. lecturer control)

Code and description			Examples from empirical data
F++	**Lecturer has explicit control of the elements of the course.**	There is no scope for students to adjust the pace, sequence, and selection of the course to shape their own learning experience. Students also have no input in how they are assessed.	The class takes on quite a typical lecture-style format. He presents content in a predefined sequence, and while there are some instances of student interaction, he definitely occupies the bulk of the talk time. There are also very few questions from the class, so he has more control over setting the pace. **ITM[C] L[1] Notes**
F+	**Lecturer retains control, but there is scope for student agency. Students can control their own learning experience.**	Student has the agency to make decisions on the sequence, pace, and selection of their learning, without affecting the learning experience of classmates.	The structure of the module presents a clear learning path. Students, however, have the power to access the learning activities in whichever sequence they choose. **MF[O] Notes**

F-	**Lecturer retains control but allows student to impact (and even potentially disrupt) others' learning experiences.**	By asking questions in class, for example, students can shape the learning experience in terms of the pace of the class, its sequence, or the selection of content and examples, therefore impacting the learning experience of their classmates.	In this lecture he tries to pick up the pace a bit. There are a few times when he refers to his desire to go through the work a bit faster. He also asks them to do their own balances or calculations at times rather than him going through every example – another strategy to speed up content coverage. As always, however, there are many student questions throughout the lesson, which affect the pace of the class, and he still allows all these questions. **MF[C] L[3] Notes**
F- -	**There is no evidence of lecturer control.**	Students dictate the learning experience with no lecturer input. This could describe a scenario in which the students rather than the lecturer determine the evaluative criteria for assessments, and can engage in peer grading.	There was no evidence of this code in my data, but it is still worth including as it is a theoretically possible category that may describe other learning environments.

Table 3: Framing: evaluative criteria (implicit/explicit)

Code and description			Examples from empirical data
F++	**Assessment requirements are explicit to students and are intentionally integrated into the course content.**	Students are given detailed guidelines on how they will be assessed, such as a detailed marking rubric that is tailored to the specific assessment (rather than a generic rubric) and provides clear mark breakdowns for each section. The rubric is also likely to include detailed and specific descriptions of what constitutes a certain mark and would therefore reduce individual interpretation. The course includes a number of formative assessments that support students in realising the evaluative criteria.	He tells the class that they will not get that [a question on accruals] in the first test, but will get it in the second test and exam. **MF[C] L[1] S[3]**
F+	**Assessment requirements are clear to students, and are integrated into the course content on an ad hoc basis.**	The lecturer or head tutor may provide additional guidance when prompted by student questions. Students are given general guidance on how they will be assessed, possibly in the form of a generic marking rubric that has potential for individual interpretation. The course may also include formative assessments that support the student in realising the evaluative criteria, although the link to evaluative criteria may not be completely explicit.	Lists the possible things he can ask them in the exam. **MF[C] L[1] S[5]**

F-	**Assessment requirements are left implicit or are vague.**	Students are given vague guidance on how they will be assessed. The lecturer or head tutor may, for example, emphasize certain sections of the course, or certain approaches to addressing tasks that would be beneficial in assessments, but may not make a direct and explicit link to assessments in their wording. The course content itself does not emphasize evaluative criteria but the lecturer/head tutor may provide some insight into evaluative criteria to individual students if they request it. This information will not be available to the rest of the class.	In Thread 6, she reminds the student to focus primarily on the transactions rather than the format. While she does not explicitly link this to assessment, it could be interpreted as guidance for the assessments. **MF[O] U[N/A] C[CDF]**
F- -	**There are no references to assessment criteria.**	Students are not given guidance on how they will be assessed, even when they request further guidance from the lecturer/head tutor. Students are not provided with a marking rubric for assessments.	The explanations of content are never linked to a particular assessment – e.g. "this section will be relevant to your project". The lecturer also does not make reference to how these concepts would be applied in an assignment or exam context – e.g. "when writing your essay, discuss this in this way". **ITM[C] L[1] Notes**

Table 4: Framing: hierarchical rules

Bernstein (2000) argues that the instructional discourse is always embedded in the regulative discourse, and it is important to note that discussions relating to evaluative criteria, teaching and learning activities, and assessment occur within a broader environment of hierarchical rules. As mentioned earlier, different code descriptions are required for the hierarchical rules. Because the aforementioned

pedagogical elements (such as selection, pace, etc.) exist within a broader hierarchical environment, it is important to describe this hierarchical environment in its own terms. The below codes describe both the learning environment and the hierarchical elements within that environment.

Code and description			Examples from empirical data
F++	**Inherently hierarchical learning environment in which the hierarchy is explicit.**	There is a clear hierarchy between head tutor/lecturer and students with clearly defined roles for each group. Relationships between the two groups are formal. The structure of the learning environment is explicitly hierarchical, and creates and reinforces boundaries between lecturer/head tutor and student through hierarchical elements, such as the layout of the lecture venue. There are often spatial elements of the hierarchy that reinforce these boundaries. The lecturer/head tutor takes an active role in transmitting information to a mostly passive student audience.	While they [the students] are expressing their concern, he does assert his power as the lecturer to deny this request. While he does say he will look into it, it is clear that he is quite resistant to the idea, and it is also clear that he will ultimately have the power to make this decision. **MF[C] L[4] Notes**

F+	**Inherently hierarchical learning environment in which the hierarchy is implicit, or masked.**	While the lecturer is in control of the learning environment, and while there are hierarchical elements within this environment, such as a formal lecture venue structure, the hierarchy is implicit, or masked by the lecturer. The lecturer could, for example, foster casual and friendly relationships with students, by chatting to or joking with them, and referring to them on a first name basis. They could also allow students the opportunity to call out questions in class without asking permission, or structure their classes in an interactive manner where informal class participation is encouraged.	He chats to another group of three students informally about the group project. At one point he refers to his wife, then he refers to something that happened in the news – the fall of the share price of Tiger Brands due to the listeriosis crisis. He then discusses some other general share trading tips that seem to be relevant to the project, but also a matter of personal interest for him and the students. When they say they don't know which shares to trade he says they should use a women's intuition and he refers to an article he read about women being better at trading. **MF[C] L[1] S[11]**

F-	**Inherently non-hierarchical learning environment in which hierarchical elements are imposed.**	The learning environment does not feature spatial markers of hierarchy. The lecturer and student roles share similar agency in this environment. Both tutors and students, for example, can post on the discussion forum whenever they wish without permission. While the lecturer/head tutor is still the primary transmitter of information, the students do play a very active role in the learning experience and have agency in impacting various pedagogical elements of the learning environment. The lecturer does impose hierarchical elements on the learning environment. This could take the form of formal interactions with students on the discussion forum, for examples, or asserting control in response to student requests.	Another student asks a question related to the test – specifically if something will be included in the test as the student is worried about the time allocation. The Head Tutor responds and says that she cannot provide more information regarding the test than what has already been released. **MF[O] U[N/A] C[CDF] Thread 8**

F- -	**Inherently non-hierarchical learning environment in which no hierarchical elements are imposed.**	As described above, the learning environment does not feature spatial markers of hierarchy, and the lecturer and student roles share similar agency. Students play an active role in the learning experience. No attempt is made to impose hierarchical elements on this learning environment. Both students and tutors play an equal role in the construction and communication of knowledge.	Given the nature of the class discussion forum in this kind of learning environment [the online learning environment], students are able to post whenever and as often as they choose. They do not require permission from the Head Tutor to post. **MF[O] Notes**

Classification

In this section two aspects of classification will be described - classification between theoretical knowledge and examples, and classification between different sections of the course.

Table 5: Classification: between theoretical knowledge and examples

Code and description			Examples from empirical data
C++	**There is no integration between theoretical concepts and examples.**	Clear boundaries are established between theoretical concepts and examples. The theory is not discussed in relation to case studies or real world scenarios, for example.	True/false question on theory from the module. These questions are purely theoretical and do not make reference to any examples. **MF[O] U[1] C[3.5]**
C+	**There is integration between the theory and professional examples.**	These professional examples occur within the field of practice, and not in the everyday world. In the Intro to Marketing course, for instance, a field of practice example could relate to the professional context of advertising or branding.	A voice over narrator is used with stick men drawings on a whiteboard. Uses a character called Jim who mows lawns. Shows a basic income statement for the income Jim has received mowing lawns using numbers. Shows the basic calculations for Jim's income and expenses. Explains that this way of depicting income and expenses is known as the cash basis of accounting. **MF[O] U[1] C[3.2]**

C-	**There is integration between the theory and everyday, practical examples.**	These everyday, practical examples fall outside of the field of practice, but are still somewhat related to it. These examples are not specialised and are often presented in layman's terms.	He tells the class that it is important for them to know this kind of language if they go to the bank, for example. [weakened classification – showing the relevance of the content in practical, real world examples]. **MF[C] L[4] S[7]**
C--	**There are no boundaries between theory and any example.**	Any examples can be discussed, even if there is no relation to the field of practice. This could describe a situation in which there is no boundary separating the theory from the everyday, and any content can be considered part of the theory.	There was no evidence of this code in my data, but it is still worth including as it is a theoretically possible category that may describe other learning environments.

Table 6: Classification: between different sections of the course

Code and description			Examples from empirical data
C++	**There is no integration between various sections of the course.**	There is no reference to previous or future sections of the course. The course is likely to be segmented into clear modules and units that do not overlap or reference each other. The assessments may be compartmentalised with no overlap between sections.	Both the contact and online Managerial Finance tests are compartmentalised. Each section of the test is based on a certain section of theory and there is no integration between sections.
C+	**There is reference to other sections of the course.**	There are a few references to previous or future sections of the course. This may become apparent in a brief introduction at the beginning of the class or a brief re-cap at the end. While there is reference to previous or future sections of the course, these are not integrated into the current course content.	Starts a re-cap of the previous class. "Tell me what you know about depreciation and non-current assets". **MF[C] L[3] S[2]**

C-	**There is integration between various sections of the course.**	Numerous references to previous or future sections of the course are made. Integration is threaded into most aspects of the course content.	There are a number of instances throughout the lecture where the lecturer refers to previous sections of the course. Often when mentioning these previous sections of the course, he also explains how they apply to the current section. **ITM[C] L[1] Notes**
C--	**No/minimal boundaries are established between various sections within the course.**	There is integration between all sections of the course. The lecturer/head tutor may choose not to segment the course content into different modules or units, for example, but rather approach it as one holistic subject area.	The Intro to Marketing online assignment contains only one broad question and is not broken down into sub-questions. Students are told to draw on the theory they have covered in the course thus far to justify their decisions. Based on these instructions, the course content is seen as one unified whole on which the students can draw.

Findings: Analysis & Coding

In this section the findings of the study are presented, as well as the coding of the various pedagogical elements. Tables summarising the framing and classification codes for both the Managerial Finance and Introduction to Marketing courses are offered below (Table 7 and Table 8). Each aspect of framing and classification is discussed in more depth below. These sections will present the key findings of the study, including extracts from the data, and will explain how the codes were determined based on these findings.

Managerial Finance: Online and Contact findings

Table 7: MANAGERIAL FINANCE

FRAMING AND CLASSIFICATION CATEGORIES	CONTACT course content	CONTACT assessment	ONLINE course content	ONLINE assessment
Selection	F++	F++	F+	F++
Sequence	F++	F+	F+	F+
Pace	F-	F++	F+	F++
Evaluative Criteria (implicit/explicit)	F++	F++	F+	F++
Evaluative Criteria (student vs. lecturer control)	F+	N/A	F++	N/A
Hierarchical Rules	F+	N/A	F-	N/A
Classification (between theoretical knowledge and examples)	C-	C++	C++	C++
Classification (between different sections of the course)	C++	C++	C++	C++

Table 7.1: Selection

MANAGERIAL FINANCE	CONTACT course content	CONTACT assessment	ONLINE course content	ONLINE assessment
SELECTION	F++	F++	F+	F++

In both the online and contact courses there is strong framing over selection, with the lecturer and facilitator respectively having the most control over selection.

In the contact course the content and scenarios are chosen by the lecturer for the most part. There is not much of a push from students to cover other topics. Most of their questions are seeking clarity on the topics being covered already, rather than offering suggestions of new topics to cover. Students rarely offer their own practical, real world examples.

In the third lecture the lecturer tells the class that he did a sociology undergraduate degree and therefore likes quite broad, open-ended questions **[MF[C] L[3] S[2]]**. He says he wishes that students

could just write what they know (in an assessment). He says, however, that they are constrained by convention at the university so this is not possible.

The lecturer's comment comparing Finance to Sociology and his desire to ask questions in a more open-ended, essay-type manner is quite interesting. It indicates something important about selection. A more open-ended approach where students just write what they know about a topic implies that students have more control and freedom in terms of selection, bringing in content they choose. The 'constrained' approach he refers to implies that students are limited in terms of what they can select to include in their assessments, and simply need to provide what is asked for in the question. He is therefore implicitly communicating to students that this course by nature has stronger framing over selection. This is contrasted with sociology where students can 'just write what they know', implying more control over selection. These comments also have important implications for evaluative criteria. While he does not state it explicitly, students could interpret these comments as guidance for the assessments and how they will be evaluated. These evaluative criteria will be discussed later in this section.

Given the points above, the contact course content has been coded as F++ in terms of framing over selection.

In the online course the content of the module is clearly established, and there is little room for students to participate in selection. Given the nature of the content itself, there is often only one right answer (e.g. a calculation), which further constrains students' ability to select.

There are more instances of weaker framing over selection in the online course than there are in the contact course (although on a small scale).

The class discussion in Thread 10 **[MF[O] U[N/A] C[CDF] Thread 10]**, where students are asked to discuss the pros and cons of accounting software, is an instance of weakened framing over selection as students have the ability to choose whichever accounting software they like and discuss it.

This discussion may not be the most effective formative assessment for this course as it does not accurately reflect the nature of questions posed in the test.. This instance of weakened framing over selection, therefore, is not an accurate representation of the requirements of the assessment.

The class discussion also presents other instances of weakened framing over selection. Students are able to start their own threads and ask the facilitator questions on the assessments or course content. While these questions still relate to the already selected content of the course, students do have some control over what is discussed in the class discussion.

One of the videos in Module 3 of the online course **[MF[O] U[2] C[3.9]]** is the component that most closely mirrors the structure of the contact lectures. The balance sheets and accounting records are shown on screen and the facilitator goes through a lecture example step-by-step, as done in the contact classes. The contact classes differ in that the lecturer asks for student participation in filling out the accounting records on the board, and is stopped often for student questions. The lecture video for the online class is less interactive. The accounting records that are shown on screen are also those that are already filled in, while the lecturer in the contact lectures fills in the records as he goes. The extract below describes how the facilitator goes through the calculations in one of the videos:

Starts going through the next question from the lecture example. The question appears on screen in text as she reads it.

Refers back to the sheet and it appears on screen. The camera zooms in on the figure that the question refers to.

The question requires a calculation so she explains this and the calculation appears on screen in numbers as she speaks.

[MF[O] U[2] C[3.9]]

As in the contact course, there is strong framing over selection and few opportunities for students to participate in selection in the online course. The focussed class discussion on accounting software, however, is one exception, as students are asked to select and discuss software with which they are familiar, and this translates to a F+ code for framing over selection, rather than the F++ code for the contact course, where this opportunity for selection is not present. Students also have the ability to start new discussion threads at any time, although this somewhat mirrors students in the contact course raising their hands in class to ask questions.

The contact and online tests are very similar, and are both coded as F++ in terms of framing over selection. In both cases, the questions clearly outline which accounting records to draw up, what needs to be included and what can be excluded. There is no opportunity in the tests for the student to bring in their own practical examples, or reference other theoretical concepts, given the nature of the questions. The marking rubrics also clearly specify only one model answer, with no space for students to select and include anything that falls outside of this model answer.

Table 7.2: Sequence

MANAGERIAL FINANCE	CONTACT course content	CONTACT assessment	ONLINE course content	ONLINE assessment
SEQUENCE	F++	F+	F+	F+

Sequence is not something that is emphasized in the contact course. There is strong framing over sequence in the sense that the lecturer decides on what sequence to present the content in. There is no room for students to dictate the sequence and there were not instances where they expressed a desire to do so. The contact course content is therefore coded as F++ in terms of framing over sequence.

In the online course the structure of the module presents a clear learning path. Learning activities are broken down into two units, and learning activities within those units are numbered, suggesting the order in which students should access those various learning activities. In this way there is more emphasis on sequence than there may be in the contact class. Students, however, have the power to access the learning activities in whichever sequence they choose.

Within the learning activities themselves, there are also links to sequence. The readings have clear headings for each section. In the video, the facilitator also makes reference to sequence. In the first video, for example, she makes a clear distinction between each method of depreciation discussed. The text appearing on screen as she speaks also assists with making this sequence explicit. It is also clear when she begins the re-cap of the video at the end **[MF[O] U[2] C[3.7]].**

In the second video the facilitator goes through each question in the lecture example step-by-step. Each question also appears in text on the screen as she speaks, helping to make this sequence through the questions explicit **[MF[O] U[2] C[3.9]].**

There is weaker framing over sequence in the online course compared to the contact course as students can decide on the sequence in which they access the various elements of the module. A clear learning path with numbered elements is presented, which strongly suggests the sequence in which students should access the course content. This sequence cannot be enforced, however, as it is in the contact course where the lecturer controls the sequence of the classes. The sequence in which an individual student accesses various elements of the course content does not impact other students. For these reasons the online course content is coded as F+ in terms of framing over sequence.

Both the contact and online tests are coded as F+ in terms of framing over sequence. The sections and questions of both tests are clearly numbered, which strongly implies a sequence. The question papers do not state, however, that the papers needs to be answered in that particular sequence, and there is no way that a sequence could be enforced on students, in terms of the order in which they choose to answer the questions. Sequence is also not referred to in the marking rubrics, and there is nothing to suggest that a student would need to answer one question in order to proceed onto the next.

The contact test is clearly broken down into two broad sections, and the online test three broad sections, each covering different topics within the course, with no integration between these sections. This assessment is clearly compartmentalised, which will be discussed in more depth in the section on classification below. While the lecturer in the contact course does not make many references to sequence, the above discussion suggests that there is no real need to position the various sections of the work within the broader course context as the tests are so clearly compartmentalised.

Table 7.3: Pace

MANAGERIAL FINANCE	CONTACT course content	CONTACT assessment	ONLINE course content	ONLINE assessment
PACE	F-	F++	F+	F++

There are indications of weaker framing over pacing in both the online and contact course, but in different ways.

In the contact course there are instances of weaker framing over pacing as there are many student questions which impact the pace of the class. In the first contact lecture, for example, a large portion of the lesson is spent on answering student questions. The lesson ends quite abruptly before the lecturer

can start on the lecture example he planned to cover. This indicates that framing could be weak, with students being able to set the pace to some extent. He also pauses often for questions and to ensure everyone is following, which allows students the opportunity to set the pace. At the end of this class he does also mention to one student that he will probably move out one of the assessment deadlines, suggesting there is weakened pacing here too. Below are just two examples of the many times he checks in with the class before proceeding.

"Happy? Any questions?" **[MF[C] L[1] S[3]]**

"Follow? Happy?" – pauses for response. **[MF[C] L[1] S[5]]**

In this first lecture alone there are 12 instances of student questions. There are also two questions before the class **[MF[C] L[1] S[11]].** The lecturer stays for about 20 minutes after the class answering questions from about 10 different students - some in groups, and some individual. He chats to them all quite informally.

In the next three lectures the lecturer does make more of an effort to control pacing. It seems he is concerned with getting through the content in the allocated time. In the second lecture, for example, the framing over pacing is stronger than it was in the previous class. He does say at the beginning of the class that he wants to move through the content faster this time **[MF[C] L[2] S[2]].** He implies on a few occasions that the class should be covering the content in their own time so that they can go through the content more speedily in class.

"I'm not going to help you so much anymore. You should have looked at it on the bus." **[MF[C] L[2] S[4]]**

He is still as open to student questions during the lesson, however, and he does pause often to check that everyone is following. At one point he asks the class if they are comfortable with the pace.

"Am I going too fast or slow enough?" **[MF[C] L[2] S[5]]**

In the third lecture the lecturer makes a comment to the students about why he feels workshops are valuable for them - "in a more relaxed environment you learn better" **[MF[C] L[3] S[1]]**. While he does not specify what he means by 'relaxed', this could refer to the pace of learning. The workshops he refers to are 2 hours long rather than the 45 minute length of the lecture and are less structured than the lectures.

In this third lecture he tries to pick up the pace. There are a few times when he refers to his desire to go through the work a bit faster.

"Let's do the next one. Quickly." **[MF[C] L[3] S[5]]**

"Now I can go a little bit faster." **[MF[C] L[3] S[6]]**

At one point a student asks a question and he seems exasperated at the fact that she does not understand the calculation he just went through. “Why do I have to say this over?” **[MF[C] L[3] S[10]].** He does, however, answer her question and goes through the calculation again.

He also asks the students to do their own balances or calculations at times rather than him going through every example – another strategy to speed up content coverage. As always, there are many student questions throughout the lesson, which affect the pace of the class. He does also stop often to ask the class if they are happy before moving on.

In the fourth lecture there is a heated discussion between some of the students and the lecturer regarding the recording of lectures. It seems that some students are struggling with the pace of the lectures, hence the request for the lectures to be recorded and uploaded onto the course’s learner management system. This discussion takes up the first 11 minutes of lecture time and both parties become quite fervent regarding their concerns. The lecturer is resistant to the idea of recording lectures, in part because he feels that it will affect attendance. He expresses to me in an informal chat **[MF[C] L[4] S[10]]** that when the department has recorded lectures in the past, attendance dropped dramatically, with some classes seeing an attendance of fewer than 10 students. He feels that he is going through the content very slowly, but clearly this view is not shared by everyone in the class. He also mentions that the amount of content covered in this course has even been reduced in recent years to address this issue. In spite of these efforts, he states that some students are not even understanding the basics of the subject. He says that he cannot help it if people are not doing their work. This implies that his perspective is that students are at least in some way accountable for their own struggles with the work.

Recording the lectures and putting them on the learner management system would mean that students would have more control over the pace at which they go through the course content (as well as the sequence to some extent). The lecturer appears to take issue with this kind of intervention, which could suggest that he is more comfortable having more control over the pace of the class. He also makes his general dislike for technology clear in the lectures too. In this fourth lecture, for example, he tells the class that he does not like using lecture slides, the learner management system, and laptops because he thinks it makes people lazy. He enjoys writing on the board rather **[MF[C] L[4] S[1]].**

While the focus of this debate in the fourth lecture is regarding pace, it clearly reveals interesting aspects of the hierarchical rules present in the contact course. This will be explored in more depth in the hierarchical rules section below.

The contact course content was coded as F- in terms of framing over pace as such a large portion of the classes are spent on answering student questions, as discussed above. This shows that students exert significant control over the pace of the class as they can slow it down to ask for clarity. This of course impacts the entire class, hence the F- code, rather than a F+ code. The lecturer does become exasperated at some points as he often cannot get through all the content he had planned for a specific class, due to all the questions. In some of the lectures the lecturer tries to speed up the pace of the class to address this issue, but he is generally open to student questions, even if this impacts the pace at which he goes through the content.

When students request the recording of the lectures an issue with the pace of the class is revealed. Clearly many students feel the pace of the class is too fast for them to fully grasp the concepts, however the lecturer asserts his control over pacing by being resistant to this request and making it clear that he

will make the final decision in this regard. This is an instance of stronger framing over pacing, and demonstrates why the F-- code would not sufficiently describe this learning context. The lecturer does allow students a great deal of control in impacting the pace of the classes for all concerned, but does not completely relinquish control in this regard.

In the online course framing over pacing is a bit different. Given that all module content is released at once, every two weeks, and given that only the live sessions require synchronous learning and communication, students can control their pace of learning. They can choose how long they spend on the module content over the two-week period, and can go back at later stages of the course to access content.

A suggested learning time is offered for each component of the learning path. This can assist students in managing the pace of their learning. The suggested learning time may, however, be too short in some cases. In the case of the videos, the suggested learning time simply accounts for the length of the video itself. It does not account for the full time students may choose to spend on this component – e.g. pausing the video and taking notes, going back to earlier points in the video for repetition. One of the videos provides a suggested learning time of 10 minutes, when the actual video length is 16 minutes, which seems to be an error **[MF[O] U[2] C[3.9]].**

Given the nature of the online course, framing over pacing is inherently weak in the sense that individual students have the agency to determine the pace of their own learning, while not impacting their peers. The bulk of the course content is asynchronous, unlike the contact course where the bulk of the content is in the form of the lectures that are at a specific day and time. This gives students more agency over the pace of their work. Pacing is strongly suggested in the form of suggested learning times for each component of the learning path, even though these time allocations may not always be accurate. Students are required to participate in certain discussions by specified deadlines in order to meet DP requirements. There are also, of course, clear deadlines for the assessments in the course, so students do not have complete control over the pace of their work. As mentioned earlier, a new module is released each week, which also enforces a pace to the course to some extent. It is for these reasons that the F+ code best describes the framing over pace in the online course content.

When it comes to assessment, both the contact and online courses were coded as F++ in terms of framing over pacing.

The contact test takes place in an invigilated test venue with a set writing time of one and a half hours, and there is therefore strong framing over pacing. The pace will be strictly enforced as students will be required to stop writing and submit their papers once the allocated writing time is complete. The question paper provides a suggested time allocation per section and per question (but not per sub-question). This seems to be in an effort to assist students in managing the pace of their work. These time allocations cannot be enforced, however. While the total writing time is strictly enforced, invigilators cannot control how long the student spends on each question.

This online test is written online. It includes 8 minutes of reading time and one hour of writing time. The reading time component was not included in the contact test, but the contact test was also one and a half hours in length. Pacing is strictly enforced as the student's test attempt will be automatically submitted on the online platform once the time is up. The question paper provides a suggested time allocation per question, but, like the contact test, the suggested time allocations cannot be enforced.

Table 7.4: Evaluative Criteria

MANAGERIAL FINANCE	CONTACT course content	CONTACT assessment	ONLINE course content	ONLINE assessment
EVALUATIVE CRITERIA (IMPLICIT/EXPLICIT)	F++	F++	F+	F++
EVALUATIVE CRITERIA (STUDENT VS. LECTURER CONTROL)	F+	N/A	F++	N/A

This section presents some key differences between the online and contact courses. Evaluative criteria are made more explicit in the contact course, in comparison to the online course. The actual content of the contact course also seems to better reflect the criteria for the assessments than the content of the online course.

In the contact course the lecturer constantly refers to evaluative criteria throughout the lectures and he is very transparent regarding these criteria. There are many instances in which he refers to tests, assignments, and the exam, and what content they would include and how they would be assessed, as he goes through each topic.

In some of the lectures he shows how marks will be allocated – e.g. how marks will be allocated for certain steps in a calculation. In the second lecture, for example, he refers to a student question and explains what a certain scenario would look like in a test or exam **[MF[C] L[2] S[4]].** He then goes on to explain how students should answer a question like that and how many marks would be allocated for it - "that's 4 marks." In the third lecture he covers a slide with the definition of depreciation **[MF[C] L[3] S[3]].** He tells the class that the content on this slide would get them 5 marks. He says, "I would have given Ms X one mark", referring to a student by name who made an attempt to answer this question earlier in the class. He also tells the class, "you will always be given the method and rate", referring to an assessment context. Below are a few other examples of his transparency regarding evaluative criteria:

> "I always ask that for 2 marks." **[MF[C] L[3] S[4]]**
>
> "Look out for that in the first test, or next week in your objective test." **[MF[C] L[3] S[5]]**
>
> "We normally give you this number. It's not so much about the number, it's about the calculation." **[MF[C] L[3] S[7]]**

The third extract above implies that students should focus on the calculation first and foremost, as this is what will be primarily assessed. In the fourth lecture he shows quite clearly what is and isn't acceptable in terms of recording transactions and how marks will be allocated. He also shows the students a different way of recording a transaction, and tells them that they will still get 100% if they record it the other way **[MF[C] L[4] S[3]].** He then explains which names (e.g. for accounts) are and are not acceptable in terms of assessments **[MF[C] L[4] S[4]].** He tells the class for example, that he does not mind which name they use for 'accrued expenses', it is only the classification as a 'current liability' that is important. He says that he has marked other names correct. Again, he does emphasize the importance of general principles rather than specific examples.

In order to assist students in preparing for the test and other assessments, he shows them how the examples they are going through could be altered in a test question – e.g. "I can play around with that" **[MF[C] L[4] S[6]].** The example he goes through in the class for expenses is a telephone expense **[MF[C] L[4] S[5]],** but he says that in a test this could be an advertising expense, or another type of expense. This focus on principles and methods rather than actual examples implicitly encourages students not to learn in parrot fashion but rather to learn how to do these types of calculations, so that they will be able to do them in the test, even if the details or questions are slightly different. Also in the fourth lecture, during the debate at the beginning of the class regarding lecture recordings **[MF[C] L[4] S[1]]** he does mention that students should approach this course as if learning a new language, rather than trying to study the content in parrot fashion. This is an important indication to students about the nature of the subject and the expectations when it comes to assessment.

He also discusses which content will not be examined. Referring to one section of work in the fourth lecture, he says this section will not be examined **[MF[C] L[4] S[7]].**

As discussed above, in the third lecture the lecturer makes an interesting comment about how he would like to ask them open-ended, essay-type questions, as you would get in Sociology, where they could discuss what they know about the subject, but they are constrained by university convention **[MF[C] L[3] S[2]].** This is an important indication to students about the nature of the subject, and also what the acceptable types of assessment are in this subject. The comparison to sociology is also quite telling. Those familiar with the subject will then be able to understand Finance in contrast to Sociology – however this is obviously not a comparison that every student can make.

In informal chats with the lecturer he is quick to discuss the flaws of the online course (he has been somewhat involved in the development and presentation of it as the course convener). He says that he did appeal to the programme manager of the online programme for the inclusion of more contact time (such as workshops on a Saturday) **[MF[C] L[1] S[12]].** He emphasizes the importance of students having contact time with lecturers and tutors and the ability to ask questions as they go through the content. He seems to feel this is an important aspect of the course and the reason why the online course has not performed well. He also says that the online students don't get the handouts that he gives in class which he feels also disadvantages them.

There are constant references to evaluative criteria throughout the contact lectures and the lecturer is explicit and transparent regarding evaluative criteria, even referring to the types of questions that would be asked in a test or exam, how they should be answered, and what the mark allocations would be. The lecturer often goes through examples in class of how questions would be asked in a test or exam and shows students how to approach them. He often provides the class with hints on what will and will not

be included in upcoming tests. For these reasons, the contact course content has been coded as F++ in terms of framing over evaluative criteria (implicit/explicit).

While the lecturer is very transparent in the lectures regarding evaluative criteria, this guidance and these hints and tips are not included in the other course material, such as the hand-outs or lecture slides. As the lectures are not recorded, if a student misses the lectures, they would not receive this guidance on evaluative criteria. This differs from the online course where responses to questions on the assessments are recorded on the discussion forum and can be referred back to at any stage.

In the online course there is less explicit reference to evaluative criteria in the actual content of the course.

The guidance on evaluative criteria is primarily included in the lecture videos and class discussion. In the lecture videos the facilitator makes some reference to assessments, and the types of questions or structure of questions in the assessments, although she does not always explicitly state the link to assessments.

> "If you get a question like that…" **[MF[O] U[2] C[3.7]]**
>
> In one of the videos she explains that in this method of depreciation certain figures will be provided, which seems to refer to an assessment context **[MF[O] U[2] C[3.7]].**

While the course content itself does not make much reference to evaluative criteria, the facilitator is more forthcoming in the class discussion forum. In the majority of the threads in the discussion forum she refers to assessment in some manner. At times she provides examples of how certain types of questions would be asked in a test or exam setting. At other times she provides general guidance on assessment:

> "Try not to get too bogged down in the format and make sure you understand the transactions themselves." **[MF[O] U[N/A] C[CDF] Thread 6]**
>
> "Please keep this example in mind re exam technique. Information is not always asked and presented "neatly" in MF questions!" **[MF[O] U[N/A] C[CDF] Thread 4]**

There are limits, however, to the amount of information she will provide on assessments. In response to a student question on the class discussion forum, the facilitator responds and says that she cannot provide more information regarding the test than what has already been released. She then provides some general guidance on managing time constraints in the test, without revealing the actual content of the test **[MF[O] U[N/A] C[CDF] Thread 8].**

In general, the lecturer in the contact classes is more open and explicit regarding the content of tests and exams than the facilitator of the online class. The advantage in the online course is that assignment questions on the class discussion are recorded and are available for any student to see for the duration of the course. This is unlike the contact class where responses to assignment questions, and tips on assignments, are not formally recorded anywhere. It is important to note, however, that there is more emphasis on evaluative criteria in the contact course content itself. In the online course hints on evaluative criteria are often only given when asked for (primarily on the discussion forum), they are not willingly provided or emphasized in the course content.

So while references to evaluative criteria are not woven into the course content itself, students do have guidance on the evaluative criteria in the discussion forums, which explains the coding of the online course content as F+ in terms of framing over evaluative criteria (implicit/explicit).

In the online course there are two interesting examples of ungraded, formative assessments.The practice quiz in this module **[MF[O] U[1] C[3.5]]** contains 20 questions. Of these 20 questions, 12 are in the format of true/false questions on theory from the module, the remaining 8 are multiple-choice questions. 14 of these questions are purely theoretical with no application, while the remaining 6 feature scenarios where students are asked to apply their knowledge.

Is this practice quiz the ideal formative assessment to prepare students for the graded assessments? The bulk of the questions in this quiz are theoretical rather than practical in nature. The test, on the other hand, places more of an emphasis on application of theory (e.g. doing calculations, filling in accounting records, etc.) rather than simple repetition or understanding of theory. This could potentially mislead students regarding how to prepare for the test.

Interestingly, the dominance of true/false questions in the practice quiz, somewhat mirrors the questions posed to the class by the lecturer in the contact lectures. The lecturer often poses questions to the class that have two answer options – e.g. increase/decrease, debit/credit, etc.

> Asks what is going to happen with expenses. He waits for answers from the class. No answer. So he asks – "will they increase or decrease?" **[MF[C] L[1] S[3]]**

> He asks the class – "will the shares be valued more or less?" ; "Will the share price increase or decrease?" **[MF[C] L[1] S[4]]**

In one of the threads on the class discussion forum **[MF[O] U[N/A] C[CDF] Thread 10]**, the facilitator proposes a discussion topic to the class regarding their thoughts on different accounting software. As in the case of the practice quiz, I do not think this is the most effective method of formative assessment for preparing students for the graded assessments of the course. Maybe the purpose of this discussion is not related to assessments at all. Maybe this discussion is useful simply for the working context (as it is very practical), and there is no link to assessment. The link to the content of the module is also not immediately clear, as this topic does not explicitly relate to the topics that have been covered in the module. The question requires weakened classification by its nature, and many students brought in their own workplace experiences in their discussion responses. Even if this question was linked to assessment in some way, it would be hard for the student to perceive that as no explicit link is made to assessment. It would also be difficult for students to get value out of this exercise in terms of preparing for assessments, as no grading is carried out, and the facilitator does not provide any feedback on student posts. Overall, the formative assessments do not seem to adequately equip students for the test.

The learning outcomes of the module seem to be emphasized more in the online course than the contact course. The online course features two learning outcomes questionnaires – one at the start and one at the end of the module. Each learning activity also features the relevant learning outcomes, so that students know what they are supposed to be gaining from each component.

As discussed previously, the contact and online test are very similar, and, in this case, both are coded as F++ in terms of framing over evaluative criteria (implicit/explicit). Both test question papers include mark allocations per section, and mark allocations per question. Students are not provided with the marking rubric with the test question papers.

Both marking rubrics comprise mainly very small mark allocations (between 0,5 – 2 marks) per entry on the accounting document. These entries include workings/calculations and answers. The marking rubrics contains a 'model answer' with the correct solutions, as there is only one correct solution per entry. The rubric shows how these individual marks should be allocated to total up to the overall mark per question. While the question papers provide the mark per question, they does not show the smaller individual mark allocations per entry.

In Question 2 in the contact test, and Question 1 in the online test, students are provided with a completed trial balance for a fictional company. They are then provided with a list of additional information. There are then three questions. Students are required to prepare three accounting records based on the original trial balance and the additional information. They are told which types of records to prepare. In the first question in the contact test, and the first and third questions in the online test, they are also told what they do *not* need to include in their answer. In this sense, the question papers are explicit in terms of what will and will not be assessed.

The one key difference between the contact and online assessments is that after the contact test results are released, the lecturer also releases the full marking rubric on the learner management system. Students then have the opportunity, in their tutorial sessions, to scrutinise their marked answer scripts and pick up any possible errors. If they identify any possible errors, they can take their script to the tutor for a correction or for additional information. This is not done in the online course.

In my communication with the contact lecturer he did express that he wants to be "as transparent as possible" regarding the test, and provide a "guide" to students on how their tests are marked (these quotes were taken from an email the lecturer sent me which can be found in Appendix 16). The fact that students have access to the marking rubric that is used to mark their tests does contribute to the transparency regarding evaluative criteria in the course. This transparency can also support students in studying for future tests and the final exam, as they have more clarity on how they are assessed.

In regard to the second dimension of framing over evaluative criteria - student vs. lecturer control - there is weaker framing evident in the contact course than in the online course.

The contact lecturer sets the test and determines how students will be assessed. While the evaluative criteria for this assessment are obviously very explicit, there is also an element of weaker framing over evaluative criteria as students take an active role in the marking process and have power here (by checking their scripts and reporting errors). In an assessment where the marking rubric is not provided, or where the rubric that is provided is generic, vague, or up to personal interpretation, the lecturer or marker has more control in that students are not empowered to query their marks – therefore the mark given is not often changed. Due to the role students play in the marking process, the contact course is coded as F+ in terms of framing over evaluative criteria (student vs. lecturer control).

As in the contact course, the facilitator in the online course sets the test and determines how students will be assessed. Evidently, the online and contact tests are very similar, in terms of how the questions are asked, as well as how students are assessed. The one key difference is that the online students are not provided with the marking rubric after the tests results are released, while the contact students are. In the contact course, time is also set aside in tutorial sessions for students to go through their answer

scripts and the rubric to pick up any marking errors or inconsistencies and alert the lecturer or facilitator to these. The online students do not have this same opportunity.
The online students therefore do not have full clarity on how they received the marks that they did, as well as how to prepare for future assessments. This also impacts hierarchical rules as, without access to the marking rubric, students are not fully empowered to check and question their marks. The facilitator and markers therefore exercise more control over the marking process, and students have little input. For these reasons the online course is coded as F++ in terms of framing over evaluative criteria (student vs. lecturer control).

Table 7.5: Hierarchical Rules

MANAGERIAL FINANCE	CONTACT course content	CONTACT assessment	ONLINE course content	ONLINE assessment
HIERARCHICAL RULES	F+	N/A	F-	N/A

In both the online and contact courses there are friendly, open, and supportive relationships between teacher and student. The lecturer-student relationship in the contact course seems to be more casual and informal. In both cases, however, the lecturer and facilitator respectively can assert their power when faced with student requests.

In the contact course the lecturer fosters an informal relationship with his students. Students often come to him and ask questions before and after the lecture, and he often stays long after the lecture is finished to answer student questions. He knows many of the students by name and will often refer to them by name when answering their questions. Sometimes he will call out a student by name during the lecture in a jokey way – "Mr X you look a bit worried. Don't worry we will sort you out." **[MF[C] L[1] S[7]]** This could also be a strategy to keep students on their toes and paying attention to the class. He often makes jokes during his lectures, such as in the first lecture where he makes a joke about how much work he gave them that weekend **[MF[C] L[1] S[9]].** At the end of the first lecture he is about to continue with a lecture example when he sees the time. "Is my time up? I was having so much fun." He smiles. Then the class starts packing up and leaving. There is no formal dismissal. **[MF[C] L[1] S[10]]** When a few students start getting some answers right, he jokes with them saying, "Oh we getting smarter now?" **[MF[C] L[2] S[9]].** In the second lecture he poses a question to the class which nobody answers. He then singles out a student at the back of the class. He does not refer to him by name but starts describing his clothing so as to identify him. He calls out, "take a chance. You can't hide behind your Apple laptop." **[MF[C] L[2] S[10]].** These are some examples of the casual and jokey exchanges he has with his students.

Often the students refer to him by his first name. There does not seem to be a formal process for students to ask questions in class, which creates a more informal, 'workshop' structure in the classes. There are also rarely formal dismissals at the end of class.

While he still maintains the casual and informal relationship with students that he has had in previous lectures, the discussion at the beginning of the fourth lecture about the recording of lectures **[MF[C] L[4] S[1]]** does create tension between him and some of the students. While they are expressing their

concern, he does assert his power as the lecturer to deny this request. While he does say he will look into it, it is clear that he is quite resistant to the idea, and it is also clear that he will ultimately have the power to make this decision.

As mentioned previously, the lecturer believes that a more relaxed environment is conducive to learning (referring to the environment in the workshop). Again, he has not stated what he means by 'relaxed', but his efforts to create a workshop-type setting in the lectures (which are traditionally formal learning environments), seems to support this.

The contact lecturer is friendly, open, and helpful with the class, as the online facilitator is with the online class. The contact lecturer, however, seems to have a more informal and casual relationship with students. He often jokes with them, and they refer to him by his first name. There are always students coming to the front to talk to him before and after class, which could suggest that they feel comfortable with him. The class is very interactive, and casual, but the physical structure of the lecture theatre still imposes a hierarchy. By nature, this structure imbues the lecturer with the speaking capital at the front, and positions the students as a passive audience.

As mentioned above, the lecturer sets the test and determines how students will be evaluated. As discussed, however, students take on a more active role in the marking process as they can check their tests against the marking rubric. This creates weaker framing over hierarchical rules as the lecturer and tutors allow students some agency in the marking process.

Given the points above, a F+ code for framing over hierarchical rules best describes the contact learning environment. The learning environment is inherently hierarchical by nature, but the lecturer masks this hierarchy through the fostering of friendly, and casual relationships with his students, and the facilitation of an informal class format.

In the online course the main points of interaction between the facilitator and students are the class discussion forums. In general, the facilitator's communication on the class discussion forum can be considered friendly, helpful, and supportive, but firm where necessary. In Thread 2 of the class discussion **[MF[O] U[N/A] C[CDF] Thread 2]**, for example, when a student asks if an assignment can be submitted in Excel rather than Word as prescribed, the facilitator acknowledges the student's feelings but does stay firm in the requirements for the assessment. She then provides a suggestion on how the student could still work in Excel, but submit assignments in Word, as well as providing a "note of caution" for the final exam.

In Thread 3 **[MF[O] U[N/A] C[CDF] Thread 3]**, she thanks a student for a "good suggestion" regarding the release of the workshop content ahead of time. While she cannot fully fulfil the student's request, she does make a compromise so that the content can be released in advance.

Given the nature of the class discussion forum in this kind of learning environment, students are able to post whenever and as often as they choose. They do not require permission from the facilitator to post. In this module, all questions posed by students on the class discussion forum are answered by the facilitator. This suggests open lines of communication between facilitator and students. While the lectures in the contact course also provide a relaxed environment for asking questions with no formal process, the lecture environment itself does not make it as easy for students to be able to comment and ask questions whenever they want, as they can do online. The actual structure of a lecture hall

automatically sets up a hierarchical relationship between lecturer and students, as mentioned above. In the online course this hierarchical structure is flattened.

In most cases the online students address the facilitator by her first name when asking questions, and she responds by addressing them by their first names when responding to questions. This goes some way to creating familiarity between the facilitator and students.

As mentioned above, the facilitator is friendly, open, and helpful with students. The facilitator's relationship with the online class is not as informal and casual as that of the contact class, though. Interactions between facilitator and student are friendly but remain professional, even though both groups refer to each other on a first name basis. The facilitator does not have a jokey or teasing relationship with her students as the lecturer in the contact class does. The facilitator can also be firm where necessary, such as when she does not budge on the requirements of assessments, or declines to disclose what will be included in the assessments.

While the facilitator does maintain more of a formal, professional relationship with her students, the nature of the online learning environment itself eliminates the very clear hierarchy that occurs in a traditional, lecture-style learning environment. There is no major difference between the online profiles of the facilitator and of the students. The profiles appear on equal footing in the online learning environment. Both groups can post on the discussion forums whenever they wish, without permission.

As in the contact class, the facilitator sets the test and determines how students will be evaluated. As discussed above, however, the online class is not provided with the marking rubric after the test results are released as the contact students are. This disempowers students to some extent and leads to stronger framing over evaluative criteria (student vs. lecturer control) than in the contact course, as students do not take an active role in the marking process. A hierarchy is established where the facilitator and assistant markers are able to determine students' marks with little input from the students themselves. Of course students are still able to query or appeal their mark if they wish, but they are not fully empowered to do so with the help of the marking rubric. This could also affect students' preparation for upcoming assessments.

In summary, the online course is an inherently non-hierarchical learning environment where the facilitator imposes hierarchical elements, and the contact course is an inherently hierarchical environment where the hierarchy is implicit. . For these reasons, the contact course is coded as F+, whereas the online course is coded as F- for framing over hierarchical rules.

Table 7.6: Classification

MANAGERIAL FINANCE	CONTACT course content	CONTACT assessment	ONLINE course content	ONLINE assessment
CLASSIFICATION (BETWEEN THEORETICAL KNOWLEDGE AND EXAMPLES)	C-	C++	C++	C++
CLASSIFICATION (BETWEEN DIFFERENT SECTIONS OF THE COURSE)	C++	C++	C++	C++

In the contact course there are a number of instances of weakened classification between the theory and the everyday. The lecturer will often contextualise the content with reference to the everyday. This weakened classification seems to be used mainly in an attempt to assist students in understanding the content. To explain the concept of paying in arrears in the first lecture, for example, he says to the class that he knows that rent is paid in advance in the real world, but here they work on the assumption of paying in arrears **[MF[C] L[1] S[6]].** He also contextualises the utility bills by referring to the drought and water restrictions in Cape Town and how this could lead to businesses using less water **[MF[C] L[1] S[9]].** To demonstrate how the company financial year is broken down into periods and cycles, he makes the comparison to how they have birthdays every year **[MF[C] L[1] S[5]].** To explain the concept of bills being paid in arrears he tells the class that those who live with their parents, or do not own their own property, must look at the utility bills to see that costs like refuse collection are paid in arrears **[MF[C] L[1] S[9]].** To explain the concept of extra costs associated with disposing of an asset, he asks the class what they would do when they want to sell their cars - "make it pretty, isn't it so?" **[MF[C] L[2] S[7]].** He then goes on to discuss the costs of things like new tyres, covering up scratches, etc. To explain the concept of debtors, the lecturer also draws on practical examples. He tells the class that if they owe the university money they are then debtors of the university. Similarly, if they have a Woolworths account, they are debtors of Woolworths **[MF[C] L[4] S[6]].**

Many of the practical, real world examples the lecturer uses are relevant to the class as students and young people, or relevant to the university environment - a context shared by all students and with which they are familiar. Not all of the examples used are everyday examples, however. Sometimes the examples are specifically related to the field of practice, and how the theory would be applicable in professional finance and accounting contexts.

At one point, the lecturer discusses the drop in share price that Steinhoff had recently experienced, and linked this to the theory they were covering at the time **[MF[C] L[2] S[2]].** In the third lecture he also differentiates between the type of depreciation they are covering, and the kind used at SARS - "what we are doing here is accounting depreciation, what SARS gives you is tax depreciation." **[MF[C] L[3] S[4]].** When discussing the theory on bad debts, he explains how bad debts work with retailers in the retail industry and explains the benefits of credit sales, even when there are bad debts **[MF[C] L[3] S[8]].** The discussion on the moral considerations of giving credit and financial literacy in this third lecture **[MF[C] L[3] S[9]]** is a departure from the course work. This could even be perceived by some students as a

sensitive or controversial subject given how many lower income and non-English speaking people have been taken advantage of by retailers who provide complex and confusing credit terms.

Many of the scenarios the lecturer works with to go through calculations in the lecture are fictional, but they are based on real world situations (the use of a fictional business with fictional expenses and income). It is important to remember that the subject itself does require reference to field of practice scenarios – this is the nature of the discipline. It is a subject which prepares students to work with real financial documents in the business world so there is a need to present the scenarios in this realistic way. The content is therefore not likely to ever be completely abstract – like it would be in a subject such as mathematics, for example.

Because the lecturer often draws on practical, everyday examples that are context-specific to the university, or to student life, in order to explain theoretical concepts, there is clearly weakened classification between everyday/practical examples and theoretical concepts in the contact course content. This explains the C- code in terms of classification between theoretical knowledge and examples.

The online course does not display this same integration between theory and examples. Scenarios are used to help explain the content, such as the one used in the first lecture video, but these are fictional scenarios. A form of weakened classification that is common in the online course, however, is the use of everyday language to explain accounting terms, as explained above. Often in the lecture video the facilitator will describe something in simple, layman's terms, and then repeat it using the accounting terminology, as seen in the extract below:

> "obligations to pay cash in the future (liabilities)"
>
> "resources that represent cash to be received in the future (debtors)"
>
> **[MF[O] U[1] C[3.1]]**

In the videos, the facilitator uses simple, everyday language to explain the accounting terms, as is evident in the extracts below:

> "Someone who owed us money, so an account receivable on our balance sheet…"
>
> "That person is unlikely to pay us…so we are overstating that asset because we are never going to collect the money."
>
> **[MF[O] U[2] C[3.7 & 3.9]]**

While, in the readings, everyday language is used to explain the accounting terms, few practical examples are used (e.g. examples of accounting in the field of practice). In this sense classification is stronger than in the contact lectures, where more practical examples are used.

The video used in the web resource **[MF[O] U[1] C[3.2]]** uses one basic scenario, as well as actual numbers, and simple, everyday language. In the first lecture video the facilitator uses one scenario to explain the concepts in the video **[MF[O] U[2] C[3.7]].**

There are few references to other, real world examples of accounting in use, however. In these videos classification is weaker than the readings, but still stronger than the contact lectures where practical examples are used.

Given the fact that the facilitator rarely draws on any practical, everyday, or field of practice examples, and the fact that the course is kept primarily theoretical, the online course is coded as C++ in terms of classification between theoretical knowledge and examples.

As mentioned previously, the contact and online tests are very similar. When it comes to classification between theoretical knowledge and examples, both are coded as C++. In both cases, the marking rubric for the tests clearly outline one model answer, with no room for students to bring in practical examples or everyday knowledge, and no room for interpretation. The questions focus on application in the sense that students need to create accounting records and complete calculations based on a fictional scenario, but there is no room to bring in anything external to this scenario or from other aspects of the field of practice.

The language used in both test papers is quite technical. Everyday language equivalents are not provided for theoretical terms. In this case there is strong classification between theoretical and everyday terms, as well as strong classification between theory and examples.

Regarding the second aspect of classification - classification between different sections of the course - there is strong classification present in both the contact and online courses. The contact lecturer rarely refers to previous or future sections of the course. The current topic is discussed in isolation and it is not immediately clear how this section of work relates to the other topics covered in the course. It is a similar case in the online course where mentions of previous or future sections of the course are rare and the topic under study is considered in isolation. In this way clear boundaries are maintained between different sections of the course, as there is no apparent integration. Both the contact and online test are compartmentalised. The tests are broken down into sections for different topics, and there is no integration between sections.

Introduction to Marketing: Online and contact findings

Table 8: INTRODUCTION TO MARKETING

FRAMING AND CLASSIFICATION CATEGORIES	CONTACT course content	CONTACT assessment	ONLINE course content	ONLINE assessment
Selection	F++	F+	F+	F+
Sequence	F++	F+	F+	F+
Pace	F++	F+	F+	F+
Evaluative Criteria (implicit/explicit)	F-	F+	F+	F--
Evaluative Criteria (student vs. lecturer control)	F++	N/A	F++	N/A
Hierarchical Rules	F++	N/A	F-	N/A
Classification (between theoretical knowledge and examples)	C-	C+	C-	C+
Classification (between different sections of the course)	C-	C-	C-	C--

Table 8.1: Selection

INTRODUCTION TO MARKETING	CONTACT course content	CONTACT assessment	ONLINE course content	ONLINE assessment
SELECTION	F++	F+	F+	F+

In the contact course, the lecturer exerts the most influence over selection. While there are a few instances where the lecturer addresses a question to the class, or asks for their examples or input, the theory covered, as well as most of the examples used, are his selection.

Similarly, in the online course, the facilitator has decided which content to cover and which examples to use in the modules. There are a few instances in which students are prompted to select their own examples to apply to the theoretical concepts, such as in the read & engage activities in both modules [**ITM[O] M[6] U[1] C[6.1] & ITM[O] M[6] U[2] C[6.4] & ITM[O] M[7] U[1] C[7.1]],** as well as Video 2 in Module 6 **[ITM[O] M[6] U[1] C[6.2]],** and the focussed class discussion on LVMH in Module 7 **[ITM[O] M[7] U[1] C[7.3]],** although these activities are not assessed and students are provided with limited or no feedback on their thoughts (there is some feedback on the class discussions in the form of comments

from the facilitator or Tutor but these are not formally assessed). There is therefore weaker framing over selection in the online course than in the contact course as students have more control over selection in the online course (in the form of read & engage activities, class discussions, and so on).

One of the most interesting observations in relation to selection in the contact course is the practical examples and case studies the lecturer uses. At one point in the first lecture **[ITM[C] L[1] S[6]]** the lecturer mentions to the class that he is using the examples of the vehicle market, and Mercedes Benz in particular, as these are examples to which the class can relate. He says that he does not want to use foreign examples that they would not understand. I wonder, however, whether this is an accurate assumption on his part. While most students may have a general understanding of the vehicle market, and many students may recognise the Mercedes Benz brand, the lecturer refers to different models by name, such as models within the S class or E class, which many students would not be familiar with, especially the subtleties between different models. The issue here is that he is using these examples to make assertions about differences in targeting and positioning (i.e. to explain theoretical concepts). One car model may be positioned as more exclusive or luxurious than another, for example. If the student is not familiar with these car models, however, the meaning of the example, and therefore the link to the theoretical concept, will be lost on them. If students were presented with images of the different car models, this could illustrate the examples. The lecture slides used in class, however, are purely text, with no images. There is the question of whether all the examples he uses are accessible. Many of the examples he uses are of premium or luxury brands targeted at the top end of the market, and higher LSM consumers. Brands like Rolex, Montblanc and Rolls Royce (used in the third lecture) are very exclusive and many students may not be familiar with them. Even if students have heard of them, it may be difficult to grasp the characteristics and subtleties of these brands when the student has had no personal interaction with them. While the luxury brands do assist in explaining certain concepts, these are rarely balanced with appropriate examples from the bottom end of the market, catered to lower LSM consumers. These brands may be more familiar and accessible to some students, yet they are rarely drawn on, in favour for more up-market brands. This could disadvantage students who do not have access to the necessary restricted code, and access to specific contextual ways of understanding these concepts.

The lecturer's control over selection could therefore become potentially problematic. He is using examples that are likely quite familiar to him and his social position, and which he assumes are just as familiar to his students, which may not be the case.

While the lecturer does use many examples to explain the content, these examples rarely include input from the students. For the most part, these examples are his own. Again, he often answers his own questions so there is not a strong focus on encouraging engagement and interaction. Below are a few examples of him answering his own questions, without giving students the opportunity to answer:

> "Cater for what? A wide range of users."
>
> "Different profile in what? Different consumer markets." **[ITM[C] L[1] S[6]]**
>
> "Looking for a good meal that is what? Reasonably priced. And also what? Family-oriented." **[ITM[C] L[1] S[7]]**

One of the key issues impacting accessibility of these examples is the fact that they are not always fully explained. In the third lecture **[ITM[C] L[3] S[3]**, for example, he discusses brands sponsoring the Rugby World Cup. While most students are likely to be somewhat familiar with the sport, I do not think that all students actively follow the sport, or fully grasp the significance of a brand sponsoring the sport, and what that communicates about the brand's positioning and target market. By the same token, students may not fully understand the significance behind a luxury brand name and what it communicates about brand quality, positioning, and so on. These are not particularly complex concepts, and could be explained quite easily, but the supposed assumption that students are fully familiar with the brands themselves, as well as their significance, could disadvantage certain students and impede their access to this valuable knowledge.

In the online course, on the other hand, a more socio-economically diverse set of brands is used, including Dis-Chem, Cosmopolitan, All Gold tomato sauce, and PEP. The facilitator on the online course often uses more in-depth or better explained examples, as compared to the contact lectures, in what could be an attempt to equip students with access to the elaborated code. In Video 1 of Module 7, for example, the Levi's case study is a detailed one that she spends a number of minutes explaining **[ITM[O] M[7] U[1] C[7.2]].** In the second video in Module 6 **[ITM[O] M[6] U[2] C[6.6]],** a number of in-depth case studies are used to explain the theory, including those of Starbucks and Dunkin' Donuts. This differs to the contact course lectures in which fewer in-depth case studies are used. In the contact classes it is more common for the lecturer to mention a variety of brands, with little contextualisation, as discussed above.

As discussed, the contact lecturer selects all of the theory and practical examples discussed in the lecture. Students can raise their hand to add their own comments if they wish, but there are no formal avenues in which students are asked to participate in selection. For these reasons, the contact course content is coded as F++ in terms of framing over selection.

The framing over selection in the online course is strong as the facilitator controls which theory and practical examples are covered in most of the course content. There are a few opportunities for students to make their own selections, however, such as in the class discussions and read & engage activities, although these tasks are not assessed. The online course therefore provides some avenues for student input in selection both when it comes to individual activities and class discussions, unlike the contact course, and this explains the code of F+ for framing over selection.

Both the contact and online assessments are coded as F+ in terms of framing over selection as students have some agency in selecting which content and examples to include in their assignments. The contact assignment instructions, for example, specify which broad sections of theory to discuss in each section, but not the specifics to be included. Question 3.3 asks students to discuss the 'segmentation, targeting, and positioning strategy' related to the case, but not which aspects of this theory.

Because the marking rubric provided in the contact assignment instructions is generic, there is also no guidance there of exactly which sections of theory students should select, and *how* they should be applied. The assignment asks for a 'critical discussion' of the three questions. These instructions therefore offer vague guidance regarding the exact format of the assignment. The instructions do not specify what format a critical discussion should take, or what sections/headings it would include. The student therefore has some agency in selecting the content and structure of their assignment.

In the online assignment instructions students are asked to select a 'strategic growth opportunity' for the brand in the case study. Strategic growth opportunities were covered in one of the sections of the course. The assignment instructions then state:
'Justify your decision by drawing on the theory you have covered so far in the course.'

There is no indication of which theory students should include here, or which sections of theory should be discussed in more depth than others. The marking rubric does provide a detailed breakdown of the sections that should be included in the submission and how each section is weighted but students do not ever see this rubric so they are not aware of which sections to focus on. The assignment instructions also do not really specify the format in which the question should be answered – e.g. as an academic essay, or a report, etc. The student does, therefore, have some agency in selecting the content and structure of their assignment, as in the contact assessment.

Table 8.2: Sequence

INTRODUCTION TO MARKETING	CONTACT course content	CONTACT assessment	ONLINE course content	ONLINE assessment
SEQUENCE	F++	F+	F+	F+

In both the online and contact course, the sequence of the course is referred to often, and is made explicit.

In the first contact lecture, for example, there are various links to sequence. The first few minutes of the lecture should clearly orient students on the sequence of the course. The lecturer mentions not only the topics that have been covered previously in the course, but also the topics still to be covered, as well as the structure of this lecture, and the following lecture, as well as the learning outcomes to be covered **[ITM[C] L[1] S[2]].** The lecturer will also often provide re-caps of previous concepts before moving onto new sections. In the second lecture, for example, he re-caps the example of the vehicle market he used in the previous lecture and how one could apply the STP concepts to these examples **[ITM[C] L[2] S[3]].** He also re-caps the definitions of each of the elements of STP. In the third lecture he re-caps some of the previous content, going through the slides containing the definitions and lists that they have already covered **[ITM[C] L[3] S[2]].** Throughout the class the lecturer communicates what content will be covered next, and the lecture slides assist with illustrating the sequence, as they have clear headings.

The contact lecturer is in complete control over the sequence of the course. There are no opportunities for students to dictate sequence, and none of the students express any desire to control the sequence. The sequence of the course is explicit, with the lecturer often referring to previous or future sections of the course in relation to the current section, and doing re-caps or introductions to help orient students. The code for the contact course content is therefore F++ in terms of framing over sequence.

Similarly, in Module 6 of the online course, clear references to sequence are made. The content covered in this study – segmentation, targeting, and positioning, referred to as STP – is a sequence itself, as each step should be carried out in that order to achieve the desired outcome. The facilitator does allude to this sequence in the first video of this module **[ITM[O] M[6] U[1] C[6.2]]**, emphasizing the importance of

segmentation as a first step which needs to be completed in this process. In the second video **[ITM[O] M[6] U[2] C[6.6]]** she orients the students once again by explaining the next step in the STP process and how this builds on the previous step. There are also references to previous content, such as when she refers to Module 2 content in Video 1 and then students have to answer a multiple choice question on this Module 2 content **[ITM[O] M[6] U[1] C[6.2]].** In the second video she discusses the Edcon brand used previously in the course as an example, and she also refers to the Vogue example from the previous video **[ITM[O] M[6] U[2] C[6.6]]**. At the end of Video 2 there is a clear re-cap of the content.

The structure of the online module does present a clear learning path. Learning activities are broken down into units, and learning activities within those units are numbered, suggesting the order in which students should access those various learning activities. Students, however, have the power to access the learning activities in whichever sequence they choose, which suggests weaker framing over sequence. Modules are released on a weekly basis, so students do not have access to all course content at once, which limits their control over sequencing somewhat. So while a clear sequence is recommended, it cannot be enforced, given the nature of the online course and students' relative autonomy. It is also important to note that the individual student's ability to determine the sequence of their learning does not impact fellow students. In the contact course, on the other hand, the lecture schedule dictates the sequence of the course, leaving students with little autonomy to control the sequence of the course. This explains the code of F+ in terms of framing over sequence in the online course content.

Another interesting element of sequence in the online course is the interactive video format used in both modules. This impacts sequencing as students have to answer multiple choice questions at certain points during the video. The video will pause automatically and a question will appear on screen. Once the student selects their answer and clicks 'Done', the video will continue playing. The use of interactive videos is an attempt to keep students engaged. Videos are generally considered quite a passive learning activity. The insertion of multiple choice questions, however, means that the student needs to actively engage with the content and, hopefully, pay attention throughout. This is similar to a strategy that lecturers use in contact classes, pausing at certain intervals to pose a question to the class to ensure they are still paying attention. Unless the lecturer picks on certain students, however, students do not have to answer these questions, whereas in the interactive video the student has to answer the question for the video to continue playing. The interactive videos are therefore one of the aspects of the online course content that displays stronger framing over sequence.

When it comes to the assessments, both the contact and online assessments are coded as F+ in terms of framing over sequence.

As the questions in the contact assignment instructions are numbered, this strongly implies a clear sequence. The instructions, however, do not state that the topics need to necessarily be addressed in that order, and this is not something that could really be controlled. Sequence is not mentioned in the marking rubric, so is not a key assessment area for this assignment.

In the online assignment there is no prescribed sequence. There is one broad question which does not include any numbered sub-questions. The marking rubric also does not refer to sequence. The question asks students to draw on the theory from the course, but does not specify the order in which this should be done. Like the contact assignment, the student therefore has agency in determining the sequence of their submission in the online course.

Table 8.3: Pace

INTRODUCTION TO MARKETING	CONTACT course content	CONTACT assessment	ONLINE course content	ONLINE assessment
PACE	F++	F+	F+	F+

The lecturer sets the pace of the class in the contact course. The class takes on quite a typical lecture-style format. He presents content in a predefined sequence, and while there are a handful of instances of student interaction, he definitely occupies the bulk of the talk time. There are also very few questions from the class, so he has more control over setting the pace.

There are a few inconsistencies in pacing in the contact course. The pace of the third lecture was quite swift, in contrast to the previous two lectures, where the lecturer covered less content but went more in depth. In this third lecture practical examples and their marketing significance are not always fully explained, and this may be attributed to the pace of the lecture. At one point in the lecture **[ITM[C] L[3] S[10]]**, for example, there is a period of 5 minutes where he mentions 6 different brands, and almost 8 aspects of theory. This is in contrast to the first lecture where he uses the one example of the Mercedes Benz brand throughout the bulk of the lecture, and therefore discusses it in far more depth. In the second lecture the lecturer does keep lecturing for 10 minutes after the designated lecture time, even though a few students are visibly restless or are packing up **[ITM[C] L[2] S[11-12]].**

Because the lecturer is in complete control over the pace of the lectures, and because there are very few student questions or comments to impact the pace of the class, the contact course content is coded as F++ in terms of framing over pace.

The structure of the online course, including the fact that the new module and all its content is released every week at once, leads to relatively weak framing over pacing. Students could go through all the content on the very first day of the new module, they could stretch it out over the week, or they could even come back to it during later modules of the course. This means that, in general, there is relatively weak framing over pacing, as students have agency in setting the pace of their learning.

The live tutorial in Module 7 **[ITM[O] M[7] U[3] C[7.11]],** however, is one of the only elements of this course that features strong framing over pacing, as students have to participate at a specific pre-selected time. It is one of the only synchronous activities during the course, unlike the discussions which are asynchronous.

It is also interesting to note the strong framing over pacing *within* the live tutorial session itself. While students are free to contribute during the session, the facilitator still has the most control over the pace of the session. For the most part, she decides how long is spent on each section, when to move on to the next slide, how long students have in the break-out rooms, and she even tells them how long they should take to do their report back **[ITM[O] M[7] U[3] C[7.11]].**

In the online course, the suggested learning time allocations in the learning path can assist students in planning their study time. These suggested learning time allocations are instances in which the framing over pacing is stronger, although it is impossible to enforce these time allocations in reality – they are merely suggestions.

Given the nature of the online course, there is inherently weaker framing over pace as students have more control over the pace at which they access the course content. The bulk of the course content is asynchronous, unlike the contact course where the bulk of the content is in the form of the lectures that are at a specific day and time. This gives students more agency over the pace of their work, without impacting the learning experience of others. Students on the online course are required to participate in certain discussions by specified deadlines in order to meet DP requirements. There are also, of course, clear deadlines for the assessments in the course, so students do not have complete control over the pace of their work. As mentioned earlier, a new module is released each week, which also enforces a pace to the course to some extent. For these reasons, the online course content is coded as F+ in terms of framing over pace.

In regard to assessments, both the contact and online Introduction to Marketing assessments are coded as F+ in terms of framing over pace. In both cases, while there are clear deadlines for these submissions, and late submission penalties are outlined in both of the assignment instructions, there are no sub-deadlines/minor deadlines along the way, and the pace at which students should approach the assignments is not recommended in the instructions. Pace is also not referred to in the marking rubrics. Students therefore have some agency over the pace at which they complete the assessment.

Table 8.4: Evaluative Criteria

INTRODUCTION TO MARKETING	CONTACT course content	CONTACT assessment	ONLINE course content	ONLINE assessment
EVALUATIVE CRITERIA (IMPLICIT/EXPLICIT)	F-	F+	F+	F--
EVALUATIVE CRITERIA (STUDENT VS. LECTURER CONTROL)	F++	N/A	F++	N/A

In both the online and contact courses few explicit references are made to the expectations of the assessments and how to excel in these. Weakened classification between the theory and case studies or practical examples, as well as weakened classification between different sections of the course, are emphasized in both courses, but the relevance of this to assessments is not clearly explained to students. The course content is not taught in relation to specific assessments, but is rather taught with the intention of helping students understand theoretical concepts and how to apply them to scenarios or case studies. This is, of course, the core skill required to succeed in the assessments, but this is rarely made explicit to students.

In the first two lectures of the contact course, for example, the lecturer does not make references to the assessments. The explanations of content are never linked to a particular assessment – e.g. “this section will be relevant to your project”. The lecturer also does not make reference to how these concepts would be applied in an assignment or exam context – e.g. “when writing your essay, discuss this in this way”. The only references to evaluative criteria are implicit, as mentioned above, in what the lecturer emphasizes in the class, such as application of theoretical concepts to actual brands and marketing scenarios. In the first lecture, for example, he explains that the concepts they have looked at here through the example of passenger vehicles can be applied to other product categories too, which demonstrates the focus on concepts and applying them to various case studies **[ITM[C] L[1] S[4]].**

Similarly in the online course, there is little reference in the videos, or elsewhere in the course content, as to how this content will be assessed. While the facilitator does demonstrate in the videos how theory could be applied to case studies, it is never made explicit that this is the expectation for the assessments. Expectations for assessments are made more explicit through informal avenues of the course, such as the discussion forums and the live tutorials.

In the class discussion for Module 7, for example, the facilitator provides a detailed post on various pointers for one of the upcoming assessments and how to approach the question **[ITM[O] M[7] U[N/A] C[CDF] Thread 7].** In the live tutorial in Module 7 **[ITM[O] M[7] U[3] C[7.11]],** the facilitator provides some time at the beginning of the session for students to provide feedback on how the course is going and ask any questions. Many of the student questions relate to the assessments and the course workload. Within the first 15 minutes of the live tutorial the facilitator provides the students with guidance on the expectations of the assignments and discussions. Much of this is general guidance on how to approach the course in an efficient manner, such as prioritising graded activities, and spending less time on ungraded activities, rather than direct explanation of what constitutes a model answer.

Within the first five minutes of the live tutorial the facilitator mentions that grade expectations should not be particularly high at the start of the programme. She says that students should not be expecting to achieve 90s at the start of the programme. This could give students some vague indication of what marks they should be expecting, but it is not specific, and does not fully clarify why the marks are allocated in this way.

The facilitator offers support to students when it comes to assessments, yet it appears that students do not always take full advantage of that support. There is a thread in the class discussion, for example, regarding group project support sessions, as well as two detailed feedback posts on previous assignments **[ITM[O] M[7] U[N/A] C[CDF]]**. There are very few student responses on these threads.

Something to consider is whether practical guidance on the assessments should be formally incorporated into the learning path of the online course. While the live tutorials and class discussions are available to everyone, students may not think to go there when studying or revising for the assessments. While the discussion forum posts remain online and can be referred back to throughout the course, the live tutorial session recordings are not provided to students, and some students do not attend these sessions, so guidance provided there regarding the assessments may not be available to all students.

Similarly in the contact course, the lecturer does not make much reference to evaluative criteria during the lectures themselves. The lecturer is, however, happy to be more explicit regarding evaluative criteria

if students approach him with specific questions. In the first lecture, for example, one of the students comes to the lecturer after class to ask for guidance on the project **[ITM[C] L[1] S[11]].** This is the only point of the class at which he becomes more explicit in terms of evaluative criteria, telling the student what content to cover and which sections to emphasize, for example. In the second lecture, a student asks him about the word limit on the project and he is clear on the expectations in terms of the length of projects submitted **[ITM[C] L[2] S[1]].** This could imply that the lecturer is open to discussing evaluative criteria with students one-on-one, or if they approach him with specific questions, but he does not integrate discussions on evaluative criteria into most of his classes.

Interestingly, in the third contact lecture, there were far more references to evaluative criteria than in the previous two lectures. In fact, in the previous two lectures evaluative criteria were not mentioned at all. At one point he gives the class direction on how they should approach Project 2, by applying the marketing mix **[ITM[C] L[3] S[5]].** Referring to the previous content on segmentation, he tells the class that in Project 2 there is a nice chunky section on STP that covers what he is covering here **[ITM[C] L[3] S[2]].** In this class he also discusses some of the theoretical concepts with reference to the Woolworths brand **[ITM[C] L[3] S[3]].** While this is not a direct reference to Project 2, it is the brand that Project 2 is based on, so will have some relevance to the project. When discussing positioning strategies during this lecture he does tell the class that this section is relevant to their project **[ITM[C] L[3] S[9]].** As mentioned before in reference to the online course – should more of an attempt be made to formally incorporate evaluative criteria into the lecture sessions?

The online course has two examples, in Module 6, of ungraded, formative assessments – a practice quiz **[ITM[O] M[6] U[1] C[6.3]],** and a compulsory tutorial discussion **[ITM[O] M[6] U[2] C[6.7]].** There are 11 questions in the practice quiz in this module. Of these 11, 7 are application questions, while 4 are purely theory questions. Questions 1-5 are also based on a single scenario. The emphasis on application rather than pure recall of theory accurately reflects the expectations of the assessments in this course.

The tutorial discussion in this module is a long case study followed by questions where students are asked to apply theory from the module to this case study. Again, this focus on application to a case study accurately reflects the expectations of the assessments in this course. In fact, this particular case study has been used in a previous presentation of the course for a test, so it should be quite helpful in showing students what to expect in a test or exam. The contact lectures do not have similar formative assessments.

As discussed in this section, neither the contact nor the online course content make evaluative criteria completely explicit. The contact lecturer makes little reference to evaluative criteria in the lectures themselves, but is more explicit regarding evaluative criteria one-on-one with students if they ask him after class. This still leaves framing over evaluative criteria quite weak as the guidance he gives to students one-on-one is not available to the whole class. There are no formative assessments in the course. For these reasons, the contact course content is coded as F- in terms of framing over evaluative criteria (implicit/explicit).

Similarly, in the online course,there are few references to evaluative criteria in the course content itself. On the discussion forums, however, the facilitator will provide explicit guidance on evaluative criteria in response to student questions, as well as in her detailed feedback and assignment prep posts. The facilitator also provides quite a bit of guidance on evaluative criteria in the live tutorial. Unlike the

contact course, this section of the online course includes formative assessments, such as a practice quiz and a tutorial discussion, which accurately reflect the requirements of the assessments – i.e. focus on application of theoretical concepts to a case study or scenario. Given the fact that the guidance provided on the discussion forums is available to all students, and can be referred back to at any point during the course, as well as the fact that the online course features formative assessments that accurately reflect the requirements of the assessments, the online course content has a stronger code than the contact course content, of F+ in terms of framing over evaluative criteria (implicit/explicit).

The contact assessment displays stronger framing over evaluative criteria (implicit/explicit) than the online assessment. Students in the contact class are provided with the marking rubric that the lecturer uses to grade their assignments in the assignment instructions document. This is, however, a generic rubric that is used to grade all assignments on the course, and is not tailored to this specific assignment. It includes generic categories such as, 'application of theoretical concepts' and 'relevance to the case study'. While there are relatively detailed descriptions within these categories, they are not tailored to the specific assignment. It is therefore still unclear which theoretical concepts are relevant to *this* case study in particular, and how they should be applied. The rubric allows space for interpretation, and it is up to the lecturer what is considered 'exceptional' or 'accomplished', for example.

The assignment is broken down into three questions – each specifying a mark allocation – with a total of 100 marks, so students should have a good idea of how each section is weighted and therefore how long to spend on each section. The word count is clearly outlined, and students are warned that submissions which exceed that word count will be penalised. Given the inclusion of a generic marking rubric and the assignment details which provide some general guidance on how students will be assessed, this contact assessment is coded as F+ in terms of framing over evaluative criteria (implicit/explicit).

Unlike the contact course, the online assignment instructions do not include a marking rubric to show students how they will be assessed. A mark allocation for 100 marks is given for the entire essay, but the assignment is not broken down into separate questions or sections with individual mark allocations, so students do not know how each section will be weighted. The word count is specified, and students are notified that content exceeding this word limit will not be marked.

There is a very detailed marking rubric for this online assignment that the facilitator and assistant markers use to grade the assignments. In this rubric there are clear mark allocations per section of the theory with detailed descriptions. If students do not include one of the sections, or they only briefly touch on a section that is weighted heavily, they will lose a number of marks. This rubric is never made available to students, however, and therefore students are not aware of how they are assessed. As the online students are not provided with a marking rubric and because there is no explicit reference to how they will be assessed, the online assessment displays weaker framing over evaluative criteria (implicit/explicit) than the contact assessment, and is coded as F--.

When it comes to the second dimension of framing over evaluative criteria (student vs. lecturer control) both the contact and online course are coded as F++. The lecturer and facilitator respectively establish the evaluative criteria and are in control of how these are assessed, through the setting of assessment tasks. Students do not have input in determining the evaluative criteria for the courses or how they will be assessed.

Table 8.5: Hierarchical Rules

INTRODUCTION TO MARKETING	CONTACT course content	CONTACT assessment	ONLINE course content	ONLINE assessment
HIERARCHICAL RULES	F++	N/A	F-	N/A

There is stronger framing over hierarchical rules in the contact course, given its traditional lecture-style format, than in the online course, with its open and flexible online structure. Both the online facilitator and the contact lecturer do take on a friendly, supportive, conversational, and sometimes casual tone with their students.

While the contact lecturer is friendly and receptive to student questions and contributions, the nature of the lecture creates defined roles for lecturer and students, with very little informal interaction. The lecturer does not refer to any of the students by name.

The lecturer poses a few questions to the class at some points, but this is not a major feature of the class. For the most part he takes an active role in transmitting the content, with students remaining passive in terms of interaction. He actually does ask a number of questions throughout the class but he rarely waits for a student response and rather answers his own questions immediately, as discussed above.

A number of students come up to him after lectures to ask for assistance over the course of the observation, and he is always helpful and friendly with them. In the first lecture he stays with a student for about 15 minutes after the class has ended, seeming to imply that he is available to students when they require his assistance **[ITM[C] L[1] S[11]].**

The online course offers a more democratic learning environment in that, while there are still defined tutor/student roles, the discussion forums allow anyone to contribute at any time, without permission. Of course some students may not feel as confident with written forms of communication.

Given the ratio of tutor to student posts in the tutorial and class discussions, it is clear that this format allows for a high level of engagement, as well as personalised responses. On the class discussion forums of the two modules under study there are exactly 32 student posts and 32 facilitator/tutor posts. This is a ratio of 1:1, meaning for every student post there is one facilitator/tutor post. In the compulsory tutorial discussion in Module 6 there are 58 student posts and 27 facilitator/tutor posts. This is a ratio of 1:0,47, meaning that there is almost one facilitator/tutor post for every two student posts.

The wrap-up videos posted on the class discussion forum on the online course are a casual and conversational form of communication and support from the facilitator to the class. They are also helpful in addressing any relevant presentation-specific issues, as the majority of the content on the online courses is pre-created, and therefore allows for little flexibility.

Any student is able to post questions on the class discussion for the facilitator at any time. The facilitator has responded to every question on both class discussions. In the discussion forums and in the live tutorials the facilitator does refer to students by name.

The live tutorial in Module 7 **[ITM[O] M[7] U[3] C[7.11]]** has a few instances of weakened framing over hierarchical rules. The facilitator dedicates the first 10 – 15 minutes of the session to student feedback and questions. This will likely go some way to making students feel supported, even in the event that the feedback is not implemented in the course going forward. It is significant that time is dedicated to support, rather than just purely academics.

During the live tutorial session itself, students do need to click a button to 'raise their hand' and the facilitator needs to grant them permission to speak. This clearly indicates that the facilitator is still in control of the session, even though interaction is highly encouraged, and therefore suggests slightly stronger framing over hierarchical rules in this learning activity, as hierarchical elements are imposed. These requests for permission to speak mirror the contact course. In the live tutorial session, however, students can write comments in the chat box whenever they like, without permission. This could be a helpful tool for those who do not feel confident enough to participate in the class vocally.

The level of one-on-one interaction and student support present in the live tutorial was not as observable in the contact classes. Most of the class time in the contact course was dedicated to academic content, and there were no instances where students provided feedback on how the course was going in general.

From the above discussion it is clear that there is stronger framing over hierarchical rules present in the Introduction to Marketing contact course than in the online course.

The contact course takes on a traditional, lecture-style format, with quite defined roles for lecturer and students. While there are questions or comments from students at times, the majority of the class involves the lecturer transmitting information to a mainly passive audience of students. This is supported by the hierarchical structure of the lecture venue, with a space in front for the lecture slides and lecturer, facing a seated audience. There is very little interaction between students and lecturer. While the contact lecturer is always friendly, helpful, and open to questions, the relationship he has with students is formal. He does not address students by name, or vice versa. The support he offers is purely academic, rather than general support in a more caring capacity. The lecturer manages deadlines and late penalties, and decides on final marks for assessments, displaying a clear hierarchy when it comes to assessments. This is an inherently hierarchical learning environment in which the hierarchy is explicit. For these reasons the contact course is coded as F++ in terms of framing over hierarchical rules.

The nature of the online learning environment, on the other hand, eliminates the clear hierarchy that occurs in a traditional, lecture-style learning environment. There is no major difference between the online profiles of the facilitator and those of the students. The profiles appear on equal footing in the online learning environment. Both groups can post on the discussion forums whenever they wish, without permission. There is a high level of engagement on the discussion forums between facilitator and students. Responses are personalised and generally include first names (by both the facilitator and the students).

The live tutorial demonstrates stronger framing over hierarchical rules as students need to ask the facilitator for permission to speak, and the facilitator is in control of the session for the most part. As in the contact course, the facilitator manages deadlines and late penalties, and decides on final marks for assessments, so there is a clear hierarchy in this regard. While the online learning environment is inherently non-hierarchical, the facilitator does impose certain hierarchical elements. For these reasons the online course is coded as F- in terms of framing over hierarchical rules.

Table 8.6: Classification

INTRODUCTION TO MARKETING	CONTACT course content	CONTACT assessment	ONLINE course content	ONLINE assessment
CLASSIFICATION (BETWEEN THEORETICAL KNOWLEDGE AND EXAMPLES)	C-	C+	C-	C+
CLASSIFICATION (BETWEEN DIFFERENT SECTIONS OF THE COURSE)	C-	C-	C-	C--

In both courses examples are drawn upon to explain the theory. In the first contact lecture, for example, the lecturer often refers to practical examples to explain the concepts he is covering. He shows how the theory would be applied in an actual marketing setting. There is the one example of the vehicle market that he refers to often throughout the class, but he also looks at other examples from various industries, such as the service industry and retail. He refers to actual brand names, such as Mercedes Benz. He draws on examples from both the South African, and international markets.

There is evidence of weakened classification between the theory and examples from the field of practice. The contact lecturer introduces the example of the Mercedes Benz brand in the first lecture **[ITM[C] L[1] S[2]]** and then goes on to use this example throughout the class to explain theoretical concepts. He refers to the price of fuel, a macroeconomic factor, and how this would impact the car market **[ITM[C] L[1] S[3]].** He also explains how the release of the new Mercedes Benz model reflects consumer tastes, and how this can be applied to the STP model.

The lecturer also draws on other brands in the class. When explaining consumer and business markets, he uses the example of Coca Cola, saying that they could sell to end users, or to re-sellers like Makro **[ITM[C] L[1] S[4]].** To explain the concepts of national and international markets, the lecturer uses the example of South African wine producers, saying that many of them used to only operate locally, but now many export overseas **[ITM[C] L[1] S[10]]**. He refers back to a previous section of the course where they looked at technology and explains how technology can open the brand up to international markets. Again, this is another example of how he integrates the theoretical concepts with examples from the field of practice.

In addition to these examples from the field of practice, the lecturer does also utilise more accessible, everyday examples that are not specific to the marketing field. In the first lecture, when discussing family life cycle as a segmentation base, he refers to families with young kids vs. empty-nesters **[ITM[C] L[1] S[9]].** He discusses the kinds of products and services that a family with young kids might need, such as babysitting services **[ITM[C] L[1] S[9]]**.

It seems the use of various examples to explain the theory is an intentional choice, as per the informal chats with the lecturer after class. The lecturer feels that the use of these practical examples will assist in making the content more accessible, especially for those who are new to the discipline **[ITM[C] L[2]**

S[14]]. He also emphasizes the importance of this course as a foundational marketing course. The other marketing courses on the programme do build on this course to some extent.

The same can be said for the online course, in which a number of examples are used in explaining the theory. To explain segmentation, the facilitator uses the example of Vogue magazine, and their three main target markets **[ITM[O] M[6] U[1] C[6.2]].** She explains how the brand has used segmentation to reach these defined groups. To explain differentiated marketing, the facilitator draws on the example of the Edcon group and their various divisions, each catering to a different market **[ITM[O] M[6] U[2] C[6.6]].** Both of these are examples of integration between theoretical concepts, and examples or case studies from the field of practice.

This weakened classification between the theory, and case study examples seems intentional. Assessments in the marketing discipline are often structured as case study questions. Students are presented with case studies (sometimes fictional, sometimes not), and are asked to apply their knowledge in creating a strategy or report to address the 'problem' in the case study. By their nature these assessments require integration between the theory and the case study. A student simply repeating or discussing the theoretical concepts in isolation would not address the question sufficiently. With this in mind, the content in both the contact and online courses are likely to be quite helpful in preparing students for this kind of integration and weakened classification.

As discussed above, both the online and contact courses make use of weakened classification between theory and everyday, practical examples, as well as between theory and professional examples from the field of practice, such as case studies. This level of integration explains the coding for both the contact and the online course content as C-, in terms of classification between theoretical knowledge and examples.

It is interesting to note, however, that this weakened classification can only be observed during the actual lectures in the contact course, and not in the lecture slides. The lecture slides used in the contact course are very text-heavy and theoretical while the examples the lecturer gives in class are more practical. No images are used on the slides at all, and no reference to practical examples. I would imagine that those students who do not attend the lectures and just study from the lecture slides would have trouble in the assessments as they would have the theoretical knowledge, but may struggle regarding how to apply it (which is crucial for assessments).

In the online course, on the other hand, the lecture videos, as well as most of the other content, includes various practical examples, and because all this content is on the learning platform, it can be referred to at any time.

When it comes to the two Introduction to Marketing assessments under study, the focus on integration is clear. The online assignment question asks students to apply theoretical concepts to the marketing case study at hand and this is the focus of the assignment. The marking rubric for the online assessment is split into different areas of theory, and all these areas need to be discussed with reference to the case study given. The rubric clearly emphasizes integration, with each section of the rubric detailing a different section of the theory and how it would apply to the case study.

The marking rubric for the contact assessment, on the other hand, does not actually mention any of the theory from the course, but rather outlines broad competencies, such as 'application of theoretical

concepts', and 'quality of writing and referencing'. There seems to be an emphasis on broader higher order skills that would be applicable to any assessment, rather than a focus on the specific case study and theory at hand. Reeves & Muller (2005), referred to in the literature review, also discuss this focus on higher order skills rather than specific subject matter when referring to the new school curriculum in South Africa, and, like other authors referenced in the literature review, argue for a renewed focus on subject matter.

75 out of the 100 marks in this rubric make specific reference to application to the case study, so it is evident that weakened classification between theoretical concepts and the case study is required. There are no purely theory-based questions in either assessment, and the emphasis on integration is clear. The required integration between theoretical concepts and professional examples from the field of practice (in the form of case studies) in both these assessments indicates a code of C+ in terms of classification between theoretical knowledge and examples.

There is another important instance of weakened classification in these observations. That is weakened classification between the various sections of the course, which is the second dimension of classification in this study.

In the first contact lecture, for example, there are a number of instances throughout the lecture where the lecturer refers to previous sections of the course. Often when mentioning these previous sections of the course, he also explains how they apply to the current section. As mentioned above, in this first lecture he explains how many South African wine producers have expanded their business from local to international **[ITM[C] L[1] S[10]]**. He explains that this was possible due to a favourable macro-environmental factor of improved technology (macro-environmental factors were covered in an earlier module of the course).

In Module 7 of the online course the facilitator makes clear links to previous content throughout the module. In Video 1 **[ITM[O] M[7] U[1] C[7.2]]** she refers back to Module 2 and makes meaningful links with the Module 2 content, which demonstrates that all the theory from the course can be meaningfully integrated, rather than being consumed in separate silos. In this video she also refers to the 4 P's which were introduced earlier in the course.

This reference to previous or future sections of the course, and the explanation of how these sections are interrelated, indicates a C- code for both the contact and online course content in terms of classification between different sections of the course. While both courses are still split into sections/modules (which explains why the C-- code would not be appropriate), there is clear integration between these various sections.

This weakened classification and integration between various sections of the course communicates something important about assessment. Creating an effective marketing strategy for a brand would involve the integration of various marketing components into one coherent and holistic strategy. Many of the assessments in this type of course are single essays where students are expected to integrate various components of the theory, rather than discussing each topic in isolation. A subject like Introduction to Marketing is far less compartmentalised in terms of sections of the course, than a subject like Managerial Finance, as was discussed above. Through these continued references to other parts of the course, students are provided with some clarity on the nature of the course, which emphasizes integration, and displays weakened classification between different sections.

The contact assignment is broken down into three questions. Each of the three questions focusses on a different aspect of theory. Given the nature of the marketing discipline, however, there will be some natural overlap between sections. Question 3.3, for example, entails a discussion of three different marketing processes – segmentation, targeting, and positioning – which are all interrelated. The assignment asks students to "present a critical discussion on the following questions", and then lists the three questions. The instruction itself is a bit ambiguous, but it does not state that students are required to address each question separately. It seems that their "critical discussion" could take the form of one essay which incorporates the three questions. This again implies integration between sections, and explains the C- code for the contact assessment in terms of classification between different sections of the course.

Classification is even weaker in the online assessment than the contact assessment. This assignment is not broken down into sub-questions. Students are told to draw on the theory they have covered in the course thus far to justify their decisions. Based on these instructions, the course content is positioned as one unified whole on which the students can draw. Individual sections are not separated out. In the marking rubric, which is not made available to students, different sections of theory are listed, but the overall essay requires significant integration between the sections, as all are interrelated. This explains the C-- code for the online assessment in terms of classification between different sections of the course.

Comparison of online courses

In Table 9, two different courses in the same delivery mode are compared. The Managerial Finance and Introduction to Marketing *online* courses are compared. To avoid repetition, the detailed explanations of these comparisons have been placed in the appendices, and a summary of some of the important findings has been included here. Framing over selection in both courses is very similar, with selection being primarily controlled by the facilitator. Given the nature of the online learning environment, students have some control over sequence and pace, however sequence is referred to more explicitly in the Introduction to Marketing course. In both online courses evaluative criteria are not woven into the course content itself, but facilitators make these evaluative criteria more explicit on the discussion forums. Given the similarity in learning environments, both courses are coded the same when it comes to framing over hierarchical rules. Finally, the online Managerial Finance course displays much stronger classification than the online Introduction to Marketing course. The latter includes many examples, while the former is kept primarily theoretical. The Managerial Finance course is also compartmentalised, whereas the Introduction to Marketing course features integration between different sections of the course.

Please refer to Appendix 17 for further detail.

Table 9: Online courses

	MANAGERIAL FINANCE		INTRODUCTION TO MARKETING	
FRAMING AND CLASSIFICATION CATEGORIES	ONLINE course content	ONLINE assessment	ONLINE course content	ONLINE assessment
Selection	F+	F++	F+	F+
Sequence	F+	F+	F+	F+
Pace	F+	F++	F+	F+
Evaluative Criteria (implicit/explicit)	F+	F++	F+	F--
Evaluative Criteria (student vs. lecturer control)	F++	N/A	F++	N/A
Hierarchical Rules	F-	N/A	F-	N/A
Classification (between theoretical knowledge and examples)	C++	C++	C-	C+
Classification (between different sections of the course)	C++	C++	C-	C--

Comparison of contact courses

In Table 10, two different courses in the same delivery mode are compared. The Managerial Finance and Introduction to Marketing *contact* courses are compared. To avoid repetition, the detailed explanations of these comparisons have been placed in the appendices, and a summary of some of the important findings has been included here. Both contact courses were very similar in terms of framing over selection and sequence, both displaying strong lecturer control. There is stronger framing over pacing in the Introduction to Marketing class, than there is in the Managerial Finance class. Given the workshop format of the Managerial Finance classes, students had more control over the pace of the classes and could impact this pace by asking questions and seeking clarity. Evaluative criteria are made more explicit in the Managerial Finance course than they are in the Introduction to Marketing course. The Managerial Finance lecturer often refers to assessments and provides explicit tips and guidance, where the Introduction to Marketing lecturer does not. Students also have more control over evaluative criteria in the Managerial Finance class as they have the opportunity to check their scripts against the rubric and ask for re-marks. The Introduction to Marketing course displays stronger framing over hierarchical rules than the Managerial Finance course, given the workshop format of the Managerial Finance classes, and the informal lecturer-student relationships. The Introduction to Marketing and Managerial Finance contact courses are similar in the sense that they both employ weakened classification between theoretical concepts and examples. The Introduction to Marketing course differs from the Managerial Finance course in that there is also weakened classification between the various sections of the course, as the course is not as compartmentalised as the Managerial Finance course.

Please refer to Appendix 18 for further detail.

Table 10: Contact courses

	MANAGERIAL FINANCE		INTRODUCTION TO MARKETING	
CONTACT COURSES	CONTACT course content	CONTACT assessment	CONTACT course content	CONTACT assessment
Selection	F++	F++	F++	F+
Sequence	F++	F+	F++	F+
Pace	F-	F++	F++	F+
Evaluative Criteria (implicit/explicit)	F++	F++	F-	F+
Evaluative Criteria (student vs. lecturer control)	F+	N/A	F++	N/A
Hierarchical Rules	F+	N/A	F++	N/A
Classification (between theoretical knowledge and examples)	C-	C++	C-	C+
Classification (between different sections of the course)	C++	C++	C-	C-

Discussion

In order to investigate the key research question of this study, a number of sub-questions were addressed first. As a reminder, the key research question is:

> *What are the affordances and limitations of both the online and contact learning environments in relation to different types of subject matter in the courses under study?*

The first three research sub-questions of this study are:

- *What is the relationship between mode of education, subject matter, and framing?*
- *What is the relationship between mode of education, subject matter, and classification?*
- *Are there any differences in the framing and classification present between different modes of education (online and contact)?*

One of the key findings of this study is that the mode of delivery actually has a limited impact on how courses are framed and classified. This conclusion was reached by observing the differences in codes among the courses in the same mode of delivery. In other words, there were many instances where the two online courses differed in terms of framing and classification, and the same was true for the two contact courses. The various aspects of framing and classification, and how they were coded in relation to the two different courses and the two different delivery modes, will be discussed in more depth below.

When the courses were coded it was found that evaluative criteria were actually made more explicit in the online Introduction to Marketing course compared to the contact version. In the Managerial Finance courses, it was the other way around, with evaluative criteria being more explicit in the contact version than in the online version. Given that explicit evaluative criteria are often considered the most crucial determinant in students' recognition and realisation rules, it is interesting to note that this aspect of framing is not necessarily dependent on the mode of delivery.

Similarly, when looking at control over evaluative criteria, it was found that there was stronger framing present in the contact Introduction to Marketing course than in the contact Managerial Finance course. This variation across courses in the same mode of delivery suggests that the mode of delivery does not determine the strength of framing.

The findings on selection indicated that there was stronger framing over selection present in the Managerial Finance online course than in the Introduction to Marketing online course. Again, this variation across courses in the same mode suggests that selection is not necessarily impacted by mode of delivery.

We can conclude that the framing of both aspects of evaluative criteria, as well as framing of selection is not determined by the mode of delivery. What about the other aspects of framing?

When it comes to sequence, the contact versions of both courses were coded F++, whereas the online versions of both courses were coded F+. Given the nature of the online learning platform, students are

likely to have more control over their individual learning experience than they would in a contact course where the sequence of lectures is dictated by the lecturer. Similarly, the online learning environment generally gives the student more control over the pace of their learning.

It is important to note that this weakened framing over sequence and pace in the online learning environment refers to the individual student's agency in controlling certain aspects of their learning. This does not impact the learning experience of fellow classmates, as each individual will determine the sequence and pace of their own learning.

Of course, contact courses can display weakened framing over sequence and pace. In fact, the Managerial Finance contact course displays weaker framing over pace than the online version of the course, due to the sheer volume of questions and appeals for clarity from students throughout each class. An important factor here is how much control the lecturer is willing to relinquish. In the case of the Managerial Finance contact lecturer, he does become exasperated at times with the slow pace at which the class is working through the content, but he never denies any student question which could impact this pace. While it was not found in this study, theoretically a contact lecturer could also allow their students more control over the sequence of the course.

Based on the discussion above, I can conclude that the online learning environment is well suited to weaker framing over pace and sequence, specifically as it relates to student agency over the individual learning experience. In cases of weaker framing over pace and sequence in a contact class, the weaker framing is likely to impact all students within the class, and allows little opportunity for individual agency. This explains the need to differentiate between the F+ and F- codes. A number of the authors referenced earlier in this dissertation, such as Scott, Yeld, & Hendry (2007), Muller & Hoadley (2010), Hoadley (2006), and Morais (2010), argue for weaker framing over pacing, or opportunities for flexible/responsive pacing, so as to give students the opportunity to acquire the necessary recognition and realisation rules at their own pace. Scott, Yeld, & Hendry (2007) argue that the potential for flexibility in online education, specifically in terms of pace of learning, could assist in addressing the seemingly intractable tensions between widening participation, increasing success rates, and enhancing quality, as well as the desire to not compromise exit standards. They suggest that online learning could offer an alternative path to the same learning outcomes (Scott, Yeld, & Hendry, 2007). Morais (2010) pointed out that flexible or responsive framing over pacing, however, has often been considered too expensive to implement. Aploon-Zokufa (2013) added that another challenge related to this approach to pacing is that it could disadvantage students who grasp content faster. Based on the findings above, it can be argued that online learning presents an environment that is conducive to these flexible approaches to pacing, as individual students have agency over the pace of their progression, while not impacting fellow learners who may require a different pace of learning.

Of course there are potential drawbacks to this flexible pacing as well. In the Managerial Finance contact lectures observed as part of this study, the bulk of the lecture time is spent going through accounting transactions and equations as a class. These lectures are very collaborative and interactive in nature, and are better described as a workshop format rather than a traditional lecture format where a lecturer transmits information to a mainly passive audience. Because the lecturer goes through these accounting transactions with the class step-by-step, there is a continuous stream of student questions and appeals for clarity. There are attempts to mirror this style of learning in the online course, as some of the lecture videos feature the facilitator going through transactions step-by-step. These lecture videos are pre-

recorded, however, and therefore cannot incorporate the same level of interactivity. Of course students can post a question for the facilitator on the discussion forum after watching the video, but this asynchronous form of communication is quite different to the quick and immediate responses students get in the contact lecture, where they can stop the lecturer in the middle of a transaction and seek clarity. This may therefore slow down learning for students on the online course. While the online course offers flexibility in pace in terms of how long a student spends on a certain section, or how many times they choose to go through a certain equation, the online learning environment also presents certain impediments which may slow down learning, such as asynchronous communication and the difficulty in receiving quick responses and opportunities for clarity.

In fact, in an informal chat with the contact Managerial Finance lecturer **[MF[C] L[1] S[12]]** he explained that he did appeal to the programme manager on the online programme for the inclusion of contact time (such as workshops on a Saturday). He emphasized the importance of students having contact time with lecturers and tutors and the ability to ask questions as they go through the content. He seems to feel this is an important aspect of the course and the reason why the online course has not performed as well as the contact version.

This discussion highlights the impact and importance of subject matter. While weaker framing over pacing may present certain impediments to learning in the Managerial Finance online course, it presents favourable opportunities in the Introduction to Marketing online course. Arasaratnam-Smith & Northcote (2017), referring to their concept of 'time for reasoned response', argue that asynchronous online discussion forums allow students time for reflection and considered responses that would not be feasible in a contact class given the time constraints and synchronous nature of discussion. This time for reflection often results in more in-depth discussions (Arasaratnam-Smith & Northcote, 2017). Given the nature of the Introduction to Marketing course and its assessments, online learning could present very helpful opportunities. In this course, students are presented with detailed case studies and are assessed on holistic and well-integrated arguments in response to the case studies, usually in the form of an essay. This kind of subject matter is therefore well suited to a learning environment where there is weaker framing over pace, and therefore time for deep reflection, considered responses, and in-depth discussions.

The impact and importance of subject matter is also evident when it comes to the issue of sequence. In their framework for characterising different subjects, Stodolsky & Grossman (1995) highlight the degree of sequence as an important characteristic of any subject. They explain that some courses feature sequential dependencies in which prior learning is perceived as a prerequisite to later learning (Stodolsky & Grossman, 1995). The example they use for this type of course is mathematics, where a student is advised to master foundational concepts before attempting more advanced equations. Similarly, a subject like Managerial Finance, and specifically the accounting section of this subject, features these sequential dependencies, and can be classified as a hierarchical knowledge structure. In the course and section under study, students progress from the basics of recording accounting transactions, to making adjustments. In a subject like Managerial Finance, therefore, weaker framing over sequence could potentially impede student acquisition. When students have the agency to determine the sequence of their own learning, as they do in the online version of the Managerial Finance course, there is the possibility that they will struggle to identify the sequential dependencies that are key to this course. Because sequential dependencies are not a key feature of the Introduction to

Marketing course, on the other hand, weaker framing over sequence would not necessarily impede learning in this course.

Lastly, hierarchical rules need to be considered. This study found that the Managerial Finance contact course displayed weaker framing over hierarchical rules than the Introduction to Marketing contact course, suggesting that the framing over hierarchical rules is not simply determined by mode of delivery. It is important, however, to consider two dimensions of hierarchical rules. The degree of formality present in the relationship between lecturer and students is not determined by the mode of delivery. This was evident in the Managerial Finance courses where the contact lecturer created a rapport with students, and developed a very casual and informal relationship with the class, whereas the online facilitator was friendly and helpful, but maintained a degree of formality with her students.

Another aspect of hierarchical rules to consider is the physical (or non-physical) learning environment itself and its hierarchical elements. In this regard, the mode of delivery does play a significant role. As discussed earlier, the traditional contact lecture theatre is inherently hierarchical in nature and designed for the lecturer to hold significant speaking capital, and for the audience to be relatively passive. Drawing on Bernstein's work, Hoadley (2006) discusses three levels of classification, one of these being the relations between spaces, and referring to the strength of demarcation between spaces used by teachers and spaces used by learners. This demarcation between spaces can become quite evident in a traditional classroom or lecture setting where a clear hierarchy is established between the lecturer's space, and the students' space. The online learning environment is more democratic in that there are no clear markers of hierarchy and the online profiles are on equal footing. When it comes to this aspect of hierarchical rules, the online learning environment presents inherently weaker framing.

While this study found that the contact learning environment is inherently hierarchical, and the online learning environment is inherently non-hierarchical, there is still potential for the lecturer or facilitator to make these hierarchies either more explicit, or more implicit. In the contact learning environment, for example, the lecturer can mask the hierarchy through the fostering of casual relationships with students, informal language, and a relaxed, 'workshop' class format. The facilitator in the online learning environment, on the other hand, can make efforts to formalise an inherently non-hierarchical learning environment through imposing hierarchical elements, such as formal and professional communication. The live tutorial in the Introduction to Marketing online course is another example of the facilitator imposing hierarchical elements, as she guides students through a structured session, in which they need to request permission to contribute vocally.

Now that framing has been discussed, our focus shifts to classification and how this is potentially impacted by the mode of delivery. The study found, for example, that the Managerial Finance online course displays very strong classification between theoretical knowledge and examples, whereas the Introduction to Marketing online course displays weak classification between these two aspects. When it comes to classification between different sections of the course, the Managerial Finance contact course displayed very strong classification, whereas the Introduction to Marketing contact course was weakly classified in this regard. The same results were evident when looking at classification between different sections of the course in the online versions of these courses. Considering these results, and the variation in classification across different courses in the same mode, we can conclude that classification is not necessarily determined by the mode of delivery.

This study identified the need to create two categories for classification, one describing the boundaries between theoretical knowledge and examples, and the other describing the boundaries between different sections of each course. Within the first category, there was a need to further distinguish between everyday, practical examples, and professional, field of practice examples. Many courses within the commerce discipline are designed to be directly applicable to professional contexts (unlike other disciplines in which the link to the world of work is not emphasized, or possibly not explicit). For this reason it was important to distinguish between these two types of examples. It was found that the Introduction to Marketing course required integration between theoretical concepts and professional, field of practice examples, specifically in the form of responses to professional case study questions. Managerial Finance, on the other hand, did not require this same integration in assessments, as these assessments remained primarily theoretical. While realistic scenarios were referred to (e.g. the name of a fictional company, or reference to realistic business costs such as 'electricity') so as to avoid complete abstraction, the details of these scenarios had little relevance to the questions themselves, and there was no scope for students to bring in any additional examples from the field of practice. The marking rubrics clearly outlined only one model answer, and marks were awarded for the correct recording of transactions and calculations.

In relation to the second category, describing the boundaries between different sections of each course, fundamental differences between the subject matter in the Introduction to Marketing and Managerial Finance courses were found once again. The Introduction to Marketing assessments required integration between various sections of the course, in order to present one holistic and integrated marketing strategy in response to a case study question. The Managerial Finance assessments, on the other hand, were clearly compartmentalised, with no integration between different sections of the course, or references in the questions to other aspects of the course

From the discussion above we can conclude that while classification is not determined by the mode of delivery, it is impacted by subject matter, with some courses requiring more or less integration between theoretical knowledge and examples, or more or less integration between various sections of the course.

The fourth research sub-question of this study is:

- Are there any inconsistencies in the framing and classification present in the course content vs. the assessments?

The coding revealed a number of instances of these inconsistencies. In the Managerial Finance contact class, for example, the lecturer often draws on everyday examples, as well as context-specific examples related to the university environment and student life, to explain theoretical concepts. This explains the code of C- in terms of classification between theoretical knowledge and examples in the course content. The assessment, on the other hand, is coded as C++ in terms of classification between theoretical knowledge and examples, as there is no opportunity to bring in outside examples.

Similarly, in both the contact and online Introduction to Marketing courses, the course content is coded as C- in terms of classification between theoretical knowledge and examples, whereas the assessments are coded as C+. While the lecturer and facilitator use everyday, practical examples in the course

content to explain concepts, the assessments require integration between theory and field of practice examples only, in the form of case studies.

In the online Managerial Finance course, one of the examples of formative assessment is the practice quiz **[MF[O] U[1] C[3.5]].** The majority of the questions in this quiz are purely theoretical with no application. This is in contrast to the assessment which places emphasis on *application* of theory, rather than the repetition or understanding of theory. This reveals another important inconsistency between course content and assessment.

Where there are inconsistencies in framing and classification between course content and assessments, there is the potential that students could misinterpret the evaluative criteria of the course. As reiterated many times above, explicit evaluative criteria are key. In the Managerial Finance contact course, for example, there are some inconsistencies between course content and assessments, but the evaluative criteria are made very explicit. This should assist students in differentiating between the examples used in class, on the one hand, and the actual requirements and expectations in an assessment context.

The key research question of this study is:

> *What are the affordances and limitations of both the online and contact learning environments in relation to different types of subject matter in the courses under study?*

The discussion above informs this question. The key affordances of the online learning environment include flexibility in terms of pace and sequence of learning, with students having agency over their own learning journey, without impacting their classmates. This flexibility in terms of pace and sequence of learning, however, is only well suited to certain types of subject matter. In the Introduction to Marketing course, for example, flexible pacing is advantageous as it allows for what Arasaratnam-Smith & Northcote (2017) refer to as 'time for reasoned response', allowing students the time for reflection and considered responses that are important in this discipline. In the Managerial Finance course, on the other hand, the flexibility in pace could impede learning as this subject matter is well suited to a collaborative and synchronous learning environment where students can interrupt and ask questions as they go through the content. Given the importance of sequential dependencies in a course featuring a hierarchical knowledge structure, like the accounting section of Managerial Finance in this case, the flexibility in terms of sequence found in an online learning environment could also impede learning. The Introduction to Marketing course does not feature these sequential dependencies so, in this case, flexibility of sequence does not impede learning. The online learning environment therefore has certain limitations with regard to flexibility over pace and sequence of learning, while the potential for stronger framing over sequence and pace could present an important affordance of the contact learning environment.

Another affordance of the online learning environment is the weaker framing over hierarchical rules in terms of the physical (or non-physical) learning environment itself. While the contact lecturer may make every effort to develop an informal and casual relationship with their students, the contact learning environment is inherently hierarchical in terms of physical space, and this is a potential limitation. While there is no consensus, many authors, including Ellery (2017), Morais & Neves (2017), and Muller & Hoadley (2010) referenced in the literature review, argue for weaker framing over hierarchical rules in

supporting students to gain the necessary recognition and realisation rules. Subject matter that requires weaker framing over hierarchical rules (possibly subject matter that involves personal and emotional engagement from students, for instance) could therefore be well suited to an online learning environment. Similarly, some groups of students may benefit from, or feel more comfortable in, a non-hierarchical learning environment. On the other hand, some students may feel more secure in a hierarchical learning environment. Gamble & Hoadley (2011), for example, argue that weak framing is only appropriate in contexts where learners can deal with ambiguity and where meanings are negotiated rather than given. They found that strong framing, especially over hierarchical rules, allowed working class students a possible entry point into the elaborated code of the school, making that transition from home to school easier (Gamble & Hoadley, 2011). Again, it is important to consider the unique requirements of the individual course, and the potential benefits or risks a less hierarchical environment would create.

Given the discussion above, it is evident that certain aspects of online and contact courses (such as flexibility over sequence and pace of learning) could be considered affordances in the context of one type of subject matter, and limitations in the context of another type of subject matter. Whether these aspects are positioned as affordances or limitations is often dependent on whether the course in question features horizontal or hierarchical knowledge structures. Because of this dependence on context, it is not possible to say that contact education is 'better' than online education, or vice versa. Each has its own affordances and limitations that are well suited to different learning contexts. It is valuable to analyse the characteristics and requirements of the individual course, as well as the student body, to determine where either online or contact learning interventions would be suitable.

As discussed earlier, Badat (2005) argues that education provision exists on a continuum with provision purely at a distance on one end of the continuum, and provision that is solely face to face on the other. Many contact university courses have various online elements, such as online discussion forums, learner management systems, online tasks, recorded lectures, etc. By the same token, many online courses have occasional contact sessions. Also, in reference to Badat's (2005) concept of a continuum of education provision, we can combine various aspects of contact and online education into one holistic course, or even apply learnings from one context to another. This study found that both the contact and online learning environments present affordances and limitations that could either assist or impede learning, depending on the unique nature of the subject matter and the course requirements. This finding prompts consideration regarding how educators can integrate both contact and online elements into one holistic, and supported learning experience, finding an appropriate place on this continuum.

If a contact course would benefit from weakened framing over pace or sequence, for example, why not add online elements to this course that would cater to this need? If an online course would benefit from more collaborative, synchronous sessions, why not try to organise contact sessions? Or, if this is not feasible, add live sessions (such as webinars or live tutorials) to enable this. If a type of subject matter features sequential dependencies, for example, the online course could implement an access-controlled learning path in which learning elements are only 'unlocked' when previous elements have been completed, therefore mirroring the stronger framing over sequence present in a contact course.

It is also important to note that while an online course may offer the individual student more agency over certain aspects of their learning experience, the course should also offer the necessary support to

aid that agency. As discussed in the literature review, Garrison & Baynton (1987) argue that the 'control' students have in the online learning environment should be composed of three elements, namely independence, power, and support. Where many online courses fall short is by giving students access to the first two elements, but not the third. So while students may have more control over the sequence and pace of their learning, the clearly defined, and numbered learning path of the online course, as well as the suggested time allocations for each learning component, can support students in managing their learning. Access to a facilitator on the discussion forums, as well as in live sessions, who is informed, helpful, and motivational, is another key aspect of this support.

This is reiterated by Chen (2001) in her discussion of transactional distance, referred to in the literature review. Transactional distance is defined as a distance of understandings and perceptions that might lead to a communication gap or misunderstanding between student and instructor (Chen, 2001). Chen (2001) found that those students who engaged more in online course discussions reported less transactional distance than those who did not engage as actively. Again, this points to the importance of the online facilitator in creating a supportive learning environment, regardless of geographical distance or mode of delivery. Whether a contact or online learning environment, the lecturer or facilitator plays a key role in supporting and challenging students. While each learning environment presents its own unique affordances and limitations, the quality of teaching and level of engagement is not constrained by the mode of delivery. It is therefore possible that, regardless of the physical proximity of lecturer and students, an online course could offer a narrower transactional distance than a contact course.

Conclusion

This study is positioned in the context of the current South African higher education landscape, grappling with issues of access and inequality. Not only is there a call for equity of access, but equity of outcomes as well. While online education is one of the interventions that could address the issue of access, it is still perceived by many as an inferior substitute to traditional, contact education, and therefore not able to offer the high quality education that is needed to address equity of outcomes. Much of this scepticism stems from the conflation of online education and MOOCs, notorious for low completion and pass rates, and little to no interaction or facilitator support. Of course, online education provision can in fact take many forms. My study offers the unique research site of both the contact and online version of a South African university's postgraduate diploma. Both the contact and online cohort of students on this programme will walk away with the same postgraduate qualification, regardless of the mode of the delivery they select, and this makes for a favourable comparison. Far from the MOOC model, the online version of this programme offers an interactive, and supportive learning environment - one that displays some of the vast potential of online education.

Bernstein's concepts of framing and classification were used as the theoretical framework of this study, and were discussed in the conceptual/theoretical framework section. Before that, the literature review section explored the views of various authors regarding the ideal combinations of framing and classification in supporting students to acquire the necessary recognition and realisation rules for success in an academic programme. While there was no consensus on this ideal, all authors could agree on the importance of explicit evaluative criteria, and a mixed pedagogic approach. The literature review then went on to discuss various authors' views on online learning and its potential, as well as the

important considerations in creating and facilitating high quality online education programmes, including adequate support, interaction, and instructor presence.

This study recognised the gap in the literature of the impact of subject matter in online education. While there is limited research into the impact of subject matter in online education specifically, the literature does address the impact of subject matter in teaching and learning in general, and the importance of a renewed focus on subject matter, and the rejection of an one-size-fits-all approach to pedagogy.

After extensive consultation of the literature, I identified that two aspects were being conflated in the literature when referring to framing over evaluative criteria. In the external language of description section of this study I therefore differentiated between the implicit/explicit dimension of framing over evaluative criteria, and the student vs. lecturer control dimension of framing over evaluative criteria. I also made the decision to create separate definitions for the framing over hierarchical rules, given their role in shaping the pedagogic environment in which the other aspects of framing operate.

When defining classification in the external language of description section it was necessary once again to differentiate between two dimensions - classification between theoretical knowledge and examples, and classification between different sections of the course. Within the first dimension, a distinction was made between everyday examples, and professional field of practice examples. This distinction was necessary given the programme under study. Courses within the commerce discipline are often designed to be directly applicable to professional contexts, hence the focus on field of practice examples.

The findings were presented according to a comparative research design format, with the online and contact Managerial Finance courses compared first, followed by the online and contact Introduction to Marketing courses, then the two online courses were compared, followed by the two contact courses.

The discussion section answered the key research question of this study, by first addressing the four sub-questions, based on the findings. It was found that sequence and pace are impacted by mode of delivery. The online learning environment presents students with the agency to control their learning experience in terms of pace and sequence, without impacting fellow classmates. While the conclusion that the online learning environment is well suited to weaker framing over pace and sequence is evident, whether this quality takes the form of an affordance or limitation depends on the subject matter. The flexible pace in the Managerial Finance course, for example, can impede or slow down learning given that this asynchronous form of communication presents difficulties in receiving quick responses and opportunities for clarity, which are possible in the contact class. Yet in the Introduction to Marketing course, this weaker framing over pace is an affordance, allowing time for reasoned response and deep reflection which is not possible in the contact class. When it comes to sequence, subject matter again has a significant impact. In a course with sequential dependencies like Managerial Finance, weaker framing over sequence could act as a limitation. In Introduction to Marketing, on the other hand, sequence is not as integral to learning.

This study found that the contact courses present an inherently hierarchical learning environment, while the online courses present an inherently non-hierarchical learning environment. While this aspect of framing is determined by mode of delivery, there is still potential for the lecturer or facilitator to make these hierarchies more or less implicit or explicit, through strategies such as building friendly, informal

relationships with students, or creating casual lecture formats. This second aspect of the hierarchical rules is not dependent on mode, but on the individual educator.

While the affordances and limitations of both the contact and online learning environments have been discussed above, it is important to note that the categorisation of one of these aspects as either an affordance or limitation is dependent on context. This points to the impact of subject matter, a key issue of this study. While weaker framing over pacing, sequence, or hierarchical rules may present an affordance in the context of one type of subject matter, it could be a limitation in another. It is important to consider context when deciding on either online or contact learning interventions or, preferably, a suitable combination of both. The online learning environment, far from being the inferior alternative to the traditional contact class, presents its own unique affordances and opportunities to enrich student learning.

Recommendations

As for further research, there is potential to apply this framework to other research sites. It would be interesting to consider other types of subject matter, as well as different course formats. While the current study focuses on a credit-bearing university qualification, one could also look at a short course format, for example.

One could also approach the research from a social justice perspective, and consider academic literacies, and technological literacies specifically, given the context. This study does not have the scope to delve into the student experience, but this could be an interesting avenue to explore. One of the aspects that makes this research site so unique is the differences in student body between the contact and online programme. As mentioned above, the online programme features a much larger cohort of RPL students, and it would be interesting to explore the impact this has on the learning experience and student success on the programme.

One of the key differences between the online and contact courses in this study is that contact students were provided with marking rubrics for the assessments, whereas online students were not. It would be interesting to look at a case in which both cohorts are provided with the same support for assessments, and to see if this has a significant impact on performance.

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Appendices

Appendix 1: Introduction to Marketing contact lectures: field notes

Introduction to Marketing: Lecture 1

Introduction to Marketing [Lecture 1]

Date: Monday 26 March 2018

Field Notes

Before lecture S1	The lecturer arrives about 10 minutes before the lecture and sets up. Nobody comes up to ask him any questions.
16h00 – 16h05 S2	He starts by asking the class how they are. He asks them if they are refreshed and ready for the week. There are a few sarcastic laughs from the students. He then starts listing the sections of content they have covered in the course thus far. He also mentions the sections they will cover later on in the course. He reminds the class that their projects are due next Tuesday. He also reminds them to do the questions at the end of each chapter (I assume this refers to a textbook or reader). He tells the class that they will be covering segmentation today, and targeting and positioning on Wednesday. He mentions that there was a request from one of the students that the lectures end on time at 16h45 so that people can make their transport. He says that he will make sure the class ends by that time. The first slide after the heading slide is a list of the five learning outcomes to be covered in the class. He reads through each of them. He also mentions that there are about 20 slides to get through in this class. [Clear links to sequence at the beginning of this lecture. Helpful in orienting students.]

	He then goes to the next slide with the definition of segmentation. He starts by drawing a circle on the board in chalk. He says that this circle represents the whole market. He then reads through the definition of segmentation on the slide. He says he will use vehicles as an example to explain this concept, and says that the circle could represent the total market for vehicles. The brand he has chosen to focus on is Mercedes Benz. He poses a question to the class. He asks the class if Mercedes Benz makes all the same vehicles. He then splits the circle up using the chalk again, into three sections which he then labels as three product categories. The first product category is passenger vehicles. He asks the class if there is only one type of passenger vehicle. They respond by shouting out a few names of different types of passenger vehicles – e.g. sedans.
16h05 – 16h10 S3	He then extends this example to the concept of targeting, explaining that different cars will be targeted to consumers with different needs. He then reads through the definition of targeting on the next slide. He then refers back to the Mercedes Benz example. He asks the class a question about one of their competitors, BMW, but nobody answers, so he answers the question himself. He refers to the price of fuel, which is a macroeconomic factor, relevant to a previous section of the course. He then tells the class the story of how the new Mercedes Benz model was released and how it reflected consumer tastes. He tells the class that he is going to stick with this example while explaining all steps of the STP model. He poses a question to the class. He asks them what would come to mind if he said the name of this particular vehicle. Students call out things.
16h10 – 16h15 S4	He then makes the link to positioning, and how what comes to mind when mentioning the name of the product reflects its positioning. There are no images on the slides of the vehicles he is referring to. He says that he has now covered the overview of STP, but wants to zone in on segmentation. He says that what they have looked at here for the example of passenger vehicles can be applied to other product categories. Refers to Maslow's hierarchy of needs which was covered earlier in the course. He goes through another example and poses a few questions that he does not give students a chance to answer, but rather answers himself. "They ignored what? Everyone else." "So that their products were what?" Answers the question himself.

	He goes through the next slide which covers types of markets – specifically consumer and business markets. He uses the example of Coca Cola to illustrate the theory, saying they could sell to end users, or to places like Makro which then re-sell.
16h15 – 16h20 S5	He goes through the next slide which covers market segments, segmentation, and mass marketing. He refers back to the circle on the board to explain the concepts. He explains how the three markets in the circle are mutually exclusive [the visual depiction demonstrates this mutual exclusivity]. He goes through the next slide which covers differentiated, niche, and one-to-one marketing. He refers back to the Mercedes Benz example to explain these concepts. He says that offering servicing for trucks would be a form of differentiation, for example. He then draws another circle on the board. He says this circle represents only passenger vehicles (a segment of the original circle). He then splits the circle equally down the middle and says that one side represents luxury vehicles, and the other side represents economy vehicles. “Provides you with what?” Again, he answers this question himself without giving students a chance to answer.
16h20 – 16h25 S6	He then starts explaining niche marketing through the same Mercedes Benz example. He says that he is using these examples (of vehicles and Mercedes Benz in particular) as they can relate to them. He says he doesn’t want to use foreign examples they wouldn’t understand. [Is this really the case?] He then discusses the competitors in this market, such as Audi and BMW. He says that if he wanted to create a niche, there could be various bases for this niche. He writes some possible bases on the board, such as ‘reliability’, and ‘resale value’. He then goes through the definition of niche marketing on the slide. “Cater for what? A wide range of users.” “Different profile in what? Different consumer markets.” Again, he answers his own questions before students have the opportunity to answer. He goes to the next slide on features of an effective segment. He goes through each point on screen and then provides a practical example of each, still referring to the example of the vehicles market. He also explains each point in more depth – e.g. substantial means ‘big enough’, responsive means that this must be a product the consumers actually desire or want, and sustainable means that this is a segment you can grow.

16h25 – 16h30 S7	He now moves on to the example of the service industry, and the restaurant industry specifically. He mentions Ocean Basket and Spur. He says that these brands had to asks themselves who their target market was going to be. He says that they asked themselves these very questions (referring to the slide on features of an effective segment). He asks the class whether they think the Spur group has been successful. A number of students nod in agreement. He asks the class whether they all recognise the brand. He says most of them would. He asks the class whether anybody does not recognise the brand. There is no response. "Looking for a good meal that is what? Reasonably priced. And also what? Family-oriented." Again, he answers his own questions. He goes on to the next slide which lists the segmentation bases. He then goes on to the next slide which explains the first segmentation base (demographic) in more depth.
16h30 – 16h35 S8	"Some products will appeal to what? Only one gender group." He says that if you were choosing media channels to advertise on you would need to know whether the gender group you are targeting consumes those media channels. "You want your audience to do what? Engage in the purchase." He refers back to a previous section of the course on consumer behaviour. He also refers back to the AIDA framework, which was covered earlier in the course. He asks the class what this stands for. Goes through each letter but nobody answers. He discusses an example of what would appeal to kids vs. teenagers. He uses the example of pop stars as brand ambassadors. When discussing level of education he uses the example of targeting an accountant. He says that in this case he would use terms like "derivatives", "stock market fluctuations", and so on. When discussing occupation he refers to the brand Caterpillar. He asks the class if they are familiar with this brand and a few nod. He explains that their shoes are designed for people who work in construction, therefore they target consumers based on occupation.
16h35 – 16h40 S9	He then explains how people who work in an office may be targeted for certain types of clothing, e.g. office wear. He then goes on to family life cycle. He asks the class if anyone can tell him why this factor is critical. One student answers saying it changes. He tells her to continue her point and that she is on the right track. She gives the example of young families with kids vs. empty-nesters.

	He says this is a good example and he continues with it himself. He says that a young couple without kids may eat out more, for example. He says that a young couple with two children may need a specific range of products and services, such as babysitting. He then refers back to a previous section of the course – consumer behaviour. He asks the class which internal variables come to mind. Nobody answers so he says motivation. He then goes on to the next slide on geographic segmentation and starts going through each of the points. He discusses the point on rural vs. urban. He refers to an example he discussed previously in the course on Shoprite. He asks the class which brand under the Shoprite group he was referring to. One student calls out "USave". He says this is correct and carries on with the example of how USave appeals to rural consumers.
16h40 – 16h45 S10	He explains that the rural/urban divide also affects the type of products you purchase and the frequency with which you purchase them. He then goes on to the point of national and international. He uses the example of South African wine producers, saying that many of them used to only operate locally, but now many export overseas. He refers back to a previous section of the course where they looked at technology and explains how technology can open the brand up to international markets. He then discusses market density and uses the example of Gauteng which has a dense population. "Localised around what? Places of employment." He then discusses climatic conditions, explain that colder climates may spark the need for certain products, such as North Face jackets. He says this would be applicable somewhere like Canada where it gets very cold. He explains that the advertising beverage companies use varies based on the seasons. In the summer months, for example, the advertising can be quite beach-focussed. He then refers back to consumer behaviour, which was covered in a previous section. He discusses the family life-cycle point. He says that certain areas contain retirement estates, which could be an example of a mix of geographic and family life-cycle factors. He also uses the example of property developments in areas with top schools, targeting families with young kids. He then says they will pick this up on Wednesday. "Thanks guys. See you on Wednesday afternoon."
After lecture S11	The students file out and one student comes to the front of the class to ask him a question on the project. He spends about 15 minutes with the student. He writes on the board to explain some of his points. He gives the student guidance on how to approach the question.

	For one section he explains that the student does not need to go into detail, but the student should show their thought process. For another section he tells the student to look at SWOT and how this feeds into the strategy. [Links to evaluative criteria].

<u>Recurring themes during observation and reflections on framing and classification:</u>

Classification:

Throughout the class, the lecturer uses practical examples to explain the concepts he is covering. He shows how the theory would be applied in an actual marketing setting. There is the one example of the vehicle market that he refers to often throughout the class, but he also looks at other examples from various industries, such as the service industry and retail. He refers to actual brand names, such as Mercedes Benz, and USave. He draws examples from both the South African, and international market.

This weakened classification between the theory, and practical or case study examples seems intentional. Assessments in the marketing discipline are often structured as case study questions. Students are presented with case studies (sometimes fictional, sometimes not), and are asked to apply their knowledge in creating a strategy or report to address the 'problem' in the case study. By their nature these assessments require integration between the theory and the case study. A student simply repeating or discussing the theory in isolation would clearly not address the question sufficiently. With this in mind, the lecturers are likely to be quite helpful in preparing students for this kind of integration and weakened classification.

There is another important instance of weakened classification in this lecture. That is weakened classification between the various sections of the course. There are a number of instances throughout the lecture where the lecturer refers to previous sections of the course. Often when mentioning these previous sections of the course, he also explains how they apply to the current section. In Block 16h40 – 16h45, for example, he explains how many South African wine producers have expanded their business from local to international. He explains that this was possible due to a favourable macro-environmental factor of improved technology (macro-environmental factors were covered earlier on in the course).

This weakened classification and integration between various sections of the course communicates something important about assessment. Creating an effective marketing strategy for a brand would involve the integration of various marketing components into one coherent and holistic strategy. Many of the assessments in this course would be single essays where students are expected to integrate various components of the theory, rather than discussing each topic in isolation. A subject like Introduction to Marketing is likely to be far less compartmentalised in terms of sections of the course, than a subject like Managerial Finance. By lecturing in this way, the lecturer is providing some clarity on the nature of the course, which is integrated by nature, and displays weakened classification between

different sections. I will of course need to confirm this assumption when analysing the assessments of the course.

Evaluative Criteria:

As mentioned in the previous section on classification, the content of the lecture could have some important implications for the evaluative criteria of the course. It seems that weakened classification between the theory and case studies or practical examples, as well as weakened classification between different sections of the course, are emphasized here. Once the assessments have been analysed, I will be able to further discuss whether the emphasis in the lectures aligns with the evaluative criteria of the assessments.

Other than a reminder at the beginning of the lecture about a project hand-in due date, there is very little reference to assessments or evaluative criteria throughout the lecture. The explanations of content are never linked to a particular assessment – e.g. "this section will be relevant to your project". The lecturer also does not make reference to how these concepts would be applied in an assignment or exam context – e.g. "when writing your essay, discuss this in this way". The only references to evaluative criteria are implicit, as mentioned above, in what the lecturer emphasizes in the class. This is quite different to the Managerial Finance lectures where the lecturer constantly refers to assessments and application throughout the classes.

One of the students comes to the lecturer after class to ask for guidance on the project. This is the only point of the class at which he becomes quite explicit in terms of evaluative criteria, telling the student what content to cover and which sections to emphasize, for example. This could imply that the lecturer is quite open to discussing evaluative criteria with students one-on-one, or if they approach him with specific questions, but he does not integrate discussions on evaluative criteria into his class.

Selection:

For the most part, the lecturer exerts the most influence over selection. While there are a few instances where the lecturer addresses a question to the class, or asks for their examples or input, the theory covered, as well as most of the practical examples used, are his selection.

One of the most interesting observations in relation to selection is the practical examples and case studies the lecturer uses. At one point in the lecture (Block 16h20 – 16h25) he mentions to the class that he is using the examples of the vehicle market, and Mercedes Benz in particular, as these are examples to which the class can relate. He says that he does not want to use foreign examples that they would not understand. I wonder, however, whether this is an accurate assumption on his part. While most students may have a general understanding of the vehicle market, and many students may recognise the Mercedes Benz brand, the lecturer refers to different models by name, such as models within the S class or E class, which many students would not be familiar with, especially the subtleties between different models. The issue here is that he is using these examples to make assertions about differences

in targeting and positioning (i.e. to explain theoretical concepts). One car model may be positioned as more exclusive or luxurious than another. If the student is not familiar with these car models, however, the meaning of the example, and therefore the link to the theory, will be lost on them.

If students were presented with images of the different car models, this could illustrate the examples. The slides used in class, however, are purely text, with no images.

The lecturer's control over selection could therefore become potentially problematic. He is using examples that are likely quite familiar to him and his social position, and which he assumes are just as familiar to his students, which may not be the case.

Another notable point regarding selection is that the lecturer draws on a mix of local and international brands in his explanations.

Sequence:

There are various links to sequence in this lecture. The first few minutes of the lecture should clearly orient students on the sequence of the course. The lecturer mentions not only the topics that have been covered previously in the course, but also the topics still to be covered, as well as the structure of this lecture, and the following lecture. Throughout the class the lecturer communicates what content will be covered next, and the lecture slides assist with illustrating the sequence, as they have clear headings.

Pace:

For the most part, the lecturer sets the pace of the class. The class takes on quite a typical lecture-style format. He presents content in a predefined sequence, and while there are some instances of student interaction, he definitely occupies the bulk of the talk time. There are also very few questions from the class, so he has more control over setting the pace.

Hierarchical Rules:

As mentioned previously, the class takes on quite a traditional lecture-style format. While the lecturer is friendly and very open to student questions and contributions, the nature of the lecture creates quite defined roles for lecturer and students, with very little informal interaction. The lecturer does not refer to any of the students by name.

The lecturer poses a few questions to the class at some points, but this is not a major feature of the class. For the most part he takes an active role in transmitting the content, with students remaining quite passive in terms of interaction. He actually does ask a number of questions throughout the class but he rarely waits for a student response and rather answers his own questions immediately. I did notice that the Managerial Finance class is a great deal more interactive than this class, but there were also significantly more student questions in the Managerial Finance class than there are here.

A student comes to the lecturer after class to ask for guidance on the project. He is very helpful and stays with the student for about 15 minutes after class. This seems to imply that he is quite available to students.

Other observations:

The first thing that struck me was the low attendance of this class, especially in comparison to the Managerial Finance classes. There were about 10 students in this class, while in the Mangerial Finance classes there were at least about 60-70 students in each class.

The lecture slides were very text-heavy and no images were used on the slides at all. The slides also contained definitions and theory, but no reference to practical examples. All the practical examples used in the class were ones that the lecturer discussed verbally, and wrote on the board. Students who did not attend the classes and only viewed the lecture slides are likely to have a good grasp of the theoretical concepts but would not have received guidance on application of these concepts (which is crucial for the assessments).

There is a key difference in theory between this course and the online equivalent. When covering segmentation bases the lecturer lists five, the fifth one being 'needs and benefits'. The online class provides students with only four segmentation bases, and does not list 'needs and benefits' as a separate segmentation base, but rather includes it as a sub-point under the fourth base – 'behavioural'.

The lecturer makes quite clear reference to learning outcomes. The learning outcomes for this section of the course are listed on a lecture slide and he goes through this slide at the beginning of the class.

The lecturer uses drawings on the board to communicate and simplify theoretical concepts in a visual manner. He uses a circle to represent a market, for example, and also splits that circle up into sections to represent the various sub-sections of a broader market.

Introduction to Marketing: Lecture 2

Introduction to Marketing [Lecture 2]

Date: Wednesday 28 March 2018

Field Notes

Before lecture	A few students trickle in. Attendance is low as there is a test for another course this evening.

S1	When the first student comes in the lecturer says that he believes there is a Finance test on tonight. The student says yes. He says that he may be in trouble then in terms of attendance, but she has come to the lecture and he will go ahead. This student then asks him if there are a minimum number of words for the project. He states the maximum word limit and explains that students who want to do well in the project should aim to reach somewhere around that word limit. He also explains that while there is no minimum word limit, if students have written a submission that is less than two thirds of the word limit they need to work on improving and expanding their argument. [Link to evaluative criteria].
16h00 – 16h05 S2	By now only two students have arrived. He asks the two students if they were in the lecture on Monday, and they both say yes. He says he is going to pick up where they left off on Monday, and re-cap what they covered. A third student walks in. The lecturer is struggling with his slides, as they are not appearing on the projector screen. He asks the students for their patience while he tries to sort it out.
16h05 – 16h10 S3	The slides are still not showing up on the projector screen. He decides to rather use the board as the four students in the lecture do not have laptops and cannot look at the slides themselves. He starts by writing STP on the board in chalk and circling it. He re-caps the examples of vehicles he used on Monday and how one could apply the STP concepts to these examples. He also re-caps the definitions of each of the elements of STP.
16h10 – 16h15 S4	He draws a circle on the board which he says could represent a whole market. He says that this time he would like to look at a new example, of clothing. “I am using examples you can relate to... brands that you would see every day.” He is now re-capping the factors that determine whether a segment is effective or not. He writes on the board: ‘1. Identifiable’ He then discusses some of the other factors verbally. He draws on the example of Edgars (the retailer) and how they stock a variety of clothing, including men’s, women’s, kids, etc. He then writes the next two factors on the board: ‘Substantial’ ‘Accessible’ He explains that consumers in South Africa are geographically dispersed. Edgars caters to this by implementing wide distribution of their stores. Edgars therefore ensures they are accessible to customers.

	Writes on board: 'Responsive' He asks the students if they have heard of the Red Hanger sale that Edgars has. A few students nod. He says that this sale is used to make the market responsive to the brand. Writes on board: 'Sustainable' He refers to the Edgars example again. "Is the market for clothing sustainable? Yes it is." He answers his own question. He now writes a heading on the board on top of this list: 'Criteria'
16h15 – 16h20 S5	He says that the next thing they need to do is ask what the bases for segmentation are. Writes a heading on the board: 'Bases' Then writes the first base: '1. Demographic' He explains that this refers to things like age, gender, race, income group, and education level. Writes on board: '2. Geographic' "Where is the market located?" He then explains that a company like Edcon (which owns Edgars) would break their market up into different provinces. He asks the class how many provinces there are and a few say "nine". He says that Edcon would consult something like Stats SA to find out the demographic breakdown of the different areas, as this will impact the demand for their products. He writes on board: '3. Psychographic' He explains that this includes lifestyle, motivation, activities that people engage in, etc. He says that this is also closely related to age as activities that teenagers enjoy, for example, would be quite different to the activities that retired people would enjoy. Writes on board: '4. Behavioural' He explains that this refers to when people consumer products, why, and in what quantities.

	He asks the class what they would find if they walk into one of these stores in winter. Someone mumbles an answer. He says “yes, winter clothing.” He also says differences between different areas affect the type of clothing sold – e.g. Cape Town is colder than KZN.
16h20 – 16h25 S6	Writes on board: ‘5. Needs and benefits’ He tells the class that he is sticking to one example so that there is continuity through these points. He makes the connection to clothing again. He says that buying warmer clothing for winter has a benefit in that you can now go out in the evenings. The benefit is the lifestyle you are able to enjoy by owning appropriate clothing. He explains that there are functional and emotional benefits in most purchases. A consumer may want the functional benefit of being warm when buying a jacket, but may also desire the status that comes with buying a branded jacket, such as North Face or Giorgio Armani. He tells the class he doesn’t want them to get confused. He then differentiates between segmentation criteria and segmentation bases. He says that he would like to go into more detail on psychographic criteria. A student asks a question which he answers. The student was confused between criteria and bases. He rubs out the circle on the board and writes the heading: ‘Psychographic’ He then writes the following list under that heading: ‘1. Personality 2. Motives 3. Lifestyle 4. Geo-demographics’
16h25 – 16h30 S7	He tells the class that everything he is writing is nicely laid out on the slides, which are on Vula. He refers back to theory covered earlier on in the course, specifically the introvert and extrovert section in consumer behaviour. He refers to the example of Woolworths and their high-quality convenience food. He explains that this is an example of targeting based on personality type. He argues that, through the convenience meals, Woolworths is targeting extroverted people who enjoy

	entertaining, and need a convenient way to do so. By spending less time on meal preparation they have more time to socialise. “Can you see where I am going with this?” Doesn’t give students time to answer this question. “What about motives?” He asks students if someone is buying hiking boots, whether it is Hi Tec or another fancy brand, do they buy these boots purely for comfort. One student shakes their head. He says the purchase is also about lifestyle, such as an interest in the outdoors.
16h30 – 16h35 S8	He refers to a previous section of the course where they looked at figure and ground. He refers to a previous example they looked at in this section of a Land Rover with scenery in the background. He tells students he is using common examples so that when they see ads in real life these things will come to mind. He asks the class what need someone would be trying to satisfy if they buy a Land Rover. What are their motives? What lifestyle are they trying to attain? He says that geo-demographic factors are relevant here. Gauteng, for example, contains consumers with sufficient disposable income, certain motives and lifestyle that would be open to this kind of purchase, more so than other provinces. He says that a CEO buying a Land Rover may do so because it suits his lifestyle, is appropriate for urban commuting as well as weekend activities, travelling for business, and creating the right impression for clients. He then goes on to an example of Woolworths. He says that Woolworths caters to different types of consumers with different needs. The same store will sell suits for R1 000, as well as R10 000. Woolworths recognises that the market is not homogenous, but rather heterogeneous in its needs.
16h35 – 16h40 S9	When discussing consumers who buy luxury cars, expensive suits, and so on, he refers to a previous section of the course on consumer behaviour. He addresses a question to the class. “Which segment guys?” Nobody answers so he says “Top End”. He says that we can achieve a level of commonality among some needs. Referring again to the example of Edgars he asks the class: “Does Edgars just sell clothes?” One student says no. “What else?” A student shouts out, “homeware”. He also refers to fragrances and the fact that some of them can cost upwards of two or three thousand rand.

	He says that when Edgars are planning their stores they would look at geo-demographic profile. The V&A Waterfront, for example, caters to high income people and tourists. One student asks why many retailers, such as Woolworths and Edgars, are implementing a department store format, and creating stores within stores. He says that this is a very good point that the student has raised. He explains that retailers understand the complexity of their market. They know that their customers want to access big brands.
16h40 – 16h45 S10	He asks the same student what they think the marketing thinking is behind these decisions. The student says that consumers want choice, and different levels of quality, such as Country Road at Woolworths. Woolworths has now introduced other brands, in addition to their house brand, for this reason. The lecturer says that in malls like Canal Walk one would find stores that exclusively stock one brand, such as Levi's or Mont Blanc. Retailers like Woolworths understand that it is convenient for consumers to have everything in one place. He tells the class he is thinking of a brand they go to all the time. "What is it?" One student says "Pick n Pay". He says yes, but tells them to think of the Shoprite Group and the various brands they own, such as USave, Checkers, and Hungry Lion. He explains that the Shoprite Group has realised that their business is not selling groceries, but rather retail in general. Whatever customers have a need for, they will try to offer.
16h45 – 16h50 S11	The allocated lecture time has come to an end but he continues. He tells the class that he won't keep them long as they are writing a test tonight. They nod and he laughs. He says that it is great that they have still come to the lecture today, but it is still empty because of the test. He then refers to something in their textbook and he gives them the page number. As he lists these points he tells them not to take it down as it is in their textbooks. He mentions media vehicles and he says he will cover this in the latter part of the syllabus. He lists a few names of magazines and some of the students shout out a few more. He mentions a few acronyms and explains what they are. He says that a good brand to look at is Coca Cola as they know their customer profiles well, and they can maintain their brand essence while catering to different audience types. He asks the class what colour the TAB packaging was when it was launched overseas. Nobody answers. He says that it wasn't targeted at men. One student suggests pink.

	He asks the student why they said that. The student says they thought pink because he said that it wasn't targeted at men. He says that it was initially marketed as a low carb alternative to other soft drinks. The brand then realised that men also enjoyed the drink, but didn't want to buy the pink can, so they changed the colour.
16h50 – 16h55 S12	He says that he is going to end the class with a last statement. He draws three circles on the board with arrows in between them. In the first circle he writes 'product'. He says he is going to leave the second circle blank as the class needs to fill it in. He fills in the third circle with 'TM'. He asks them what it stands for, and one student says, "target market". He then asks the class what should be in the middle circle. Nobody answers. He draws arrows from the other lists already on the board to the middle circle. He says this middle circle is all about how you communicate the benefits of the product to the target market. He says he wants to ask the class one last question. He asks them what 'AIDA' stands for. He mentions that he covered this on Monday. One of the students answers, and he says, "yes, full marks". He tells them that next time they see an ad they need to look out for these things (the components of AIDA). "Good luck with the test. I will see you after the vac."
After lecture S13	Students file out and he starts packing up. Nobody asks him any questions after the class.

[S14] Informal chat with lecturer after the class:

The lecturer explains that his strategy in these lectures is to explain theoretical concepts through practical examples with which he thinks students would be familiar. He explains that many of the students on this programme have never studied commerce before, and the programme overall is very challenging. He also mentions that he doesn't want them to just read the textbook without the examples in his lectures, as many of the concepts may be quite foreign to them.

He mentions that there are many international students in this class.

The lecturer provides an overview of the assessment structure for this course:

Project 1 – 25%

Project 2 – 25%

Final Exam – 50%

The projects are completed in groups of two. Project 2 is the one that will assess STP.

The lecturer explains that while this course has used tests as a form of coursework assessment in the past, he has decided this year to assign two projects to students as their coursework assessment. He feels that projects will better prepare students for the actual job requirements of the marketing field. He said in a marketing role, a manager may ask an employee to do some research and write a report on a market or product, for example. He says that the project prepares students well for this, especially working on their research skills and having more time to conduct relevant research.

He also mentions that the lectures are usually quite well attended but this week has been a busy one in terms of submission deadlines on the programme.

Recurring themes during observation and reflections on framing and classification:

Classification:

As in the previous lecture, there is weakened classification between the theoretical concepts and practical examples. As per my assumption in the previous lecture, this is the lecturer's intention. During an informal chat after the lecture he mentions that he uses practical examples to help students understand the theoretical concepts.

Another recurring feature is the weakened classification between the different sections of the course. As in the previous lecture, the lecturer often refers to previous sections of the course and how they apply to the current section under study.

Evaluative Criteria:

During the informal chat after the lecture, the lecturer explains the assessment structure of the course. He feels that the projects are an effective way to assess students' knowledge of the content as well as prepare them for professional roles in the marketing field. He believes that these projects mirror tasks that would be carried out in a professional role. He emphasizes the importance of research in these projects, and therefore also in the marketing industry.

It is interesting that he believes that the projects are more effective than a test in assessing this subject, yet the final exam, and therefore half of the weighting for assessments in this course, reflects a very different type of assessment. While I am sure the final exam will still assess students' ability to apply the theory in real world scenarios or case studies, it is difficult to assess a student's research skills in an exam (as students are generally presented with a new, unseen question in an exam, and are not allowed

to bring papers or electronic devices with them). An exam is also a time-pressured form of assessment, which is at odds with his belief that it is important to give students time to research a given topic in their assessment.

It is likely that the requirements of the programme or the faculty make exam assessment necessary for most courses, so I am sure the course and its assessments are restricted in that sense. It is still interesting, however, that this form of assessment (exam) is quite at odds with the lecturer's idea of an effective assessment for this subject. Another concern is that the projects may not adequately prepare students for the final exam. While there is likely to be overlap in terms of theory, application, and structure of the projects and the final exam, the research skills emphasized in the projects, as well as the emphasis on adequate time to research and prepare the reports, are at odds with the requirements of the exam.

As in the previous lecture, the lecturer makes little if any reference to assessments during his prepared lecture. The content is not taught in relation to the assessments. The lecturer is, however, happy to be more explicit regarding evaluative criteria if students approach him with specific questions. A student asks him about the word limit on the project and he is quite clear on the expectations in terms of the length of projects submitted.

Sequence:

As in the previous lecture the lecturer exerts a lot of control over the sequence of the lecture. He still provides quite a bit of information on the content already covered and content to be covered in this lecture in order to orient students, but this time he does not have the assistance of his lecture slides to explain the sequence of the class.

Selection:

Again, the lecturer exerts a lot of control over the selection of both theory and practical examples used in the class.

Hierarchical Rules:

The lecturer is once again quite friendly and receptive to student questions. While there is a bit more interaction in this lecture than the last in terms of students answering questions or providing suggestions, there is still quite a typical lecture-style format where the majority of the lecture involves him actively transmitting content while students are mainly passive.

Pace:

As in the previous lecture, the lecturer exerts quite a lot of control over the pace of the class. There are few student questions to impact the pace of the class. The lecturer does keep lecturing for 10 minutes after the designated lecture time, even though a few students are visibly restless or are packing up.

Other observations:

Attendance for this lecture was even lower than the previous lecture. It seems the Finance Test that took place that evening impacted attendance.

Again, the lecturer used drawings on the board to explain theoretical concepts in a more visual manner.

Introduction to Marketing: Lecture 3

Introduction to Marketing [Lecture 3]

Date: Monday 9 April 2018

Field Notes

Before lecture S1	The lecturer sets up and writes a few points on the board in chalk. None of the students come up to ask questions but do talk amongst themselves. There are more students in attendance this time than there were in the previous lecture – around 15. According to the lecturer there are around 60 students registered for the course.
16h00 – 16h05 S2	The lecturer greets the class and asks everyone if they are rested and ready for the new term (as this is the first lecture after the mid-semester break). He tells them that Project 1 is done and dusted as they handed that in the previous week. He asks the class what Project 2 is on. A few students call out “Woolworths”. He says yes. He tells them that he thinks this is a project they will enjoy. It is broken down into questions, and it incorporates STP, as well as some of the other work covered earlier in the course, and some of the work that will be covered in the following lectures. He tells the class that at the next lecture they will start on Product, so they will definitely wrap up the STP section today.

	He re-caps some of the previous content, going through the slides containing the definitions and lists that they have already covered (including the criteria and bases for segmentation). He tells the class that his slides are a good summary of these concepts, similar to what one would find in any international marketing textbook. Referring to the previous content on segmentation, he tells the class that in Project 2 there is a nice chunky section on STP that covers what he is covering here. [Link to evaluative criteria]. The lecturer re-caps geographic segmentation by using the practical example of how climatic conditions affect marketing decisions – e.g. the winter clothing ranges are now out at most stores as the colder season starts. He re-caps psychographic segmentation. He asks the class how many provinces there are. A few students mumble, "nine". Again, he refers to Project 2. He says that Woolworths is aware of exactly where their target market resides. They know where the higher LSM groups reside geographically and how to reach them with appropriate store placement. [Link to evaluative criteria].
16h05 – 16h10 S3	"Location is important. Why? They want to be accessible." He answers his own question. Referring to a particular segment of the market he says, "You will find high concentration where? Sandton." Again he answers his own question. He then re-caps behavioural segmentation. "If I say Rolls Royce what comes to mind?" He then lists things like "luxury", before any of the students can answer. He refers to rugby matches and how they are sponsored by SAB. He also refers to another brand that supported the Rugby World Cup and tells students they might remember it from a few years back. He then starts on rate of product adoption. He tells the class that this is covered well in their textbook. He says that a brand like Woolworths is often used by innovators and early adopters. He uses the example of cold pressed juices that are sold at Woolworths and are targeted at health conscious early adopters. [While this is not a direct reference to Project 2, it is the brand that Project 2 is based on, so will have some relevant to the project]. He then starts on loyalty segmentation. He asks the class what the top tier of the brand loyalty list is. Nobody answers so he says it is 'brand insistence'. He then lists some of the other points, such as 'brand awareness' and 'brand preference'. Asks the class what ATL stands for. Nobody answers so he answers himself – above the line.

16h10 – 16h15 S4	He then goes through price-point segmentation. He explains that this is the level of sensitivity displayed by the target audience in relation to the movement in price. In other words, it describes how inelastic or elastic the market is. He then goes through distribution outlet segmentation. He says that people enjoy convenience and safety. "What do they want? A range of stores in a small, geographically concentrated area." He answers his own question. He explains that consumers also want forms of entertainment in these areas, giving the example of malls with shops, restaurants, and cinemas. "Fits in with Maslow's…", someone calls out "hierarchy of needs". He then goes to the slide on the segmentation process and goes through the slide step-by-step. He refers back to the example of the cold pressed juices at Woolworths. He tells the class that he is using this example as a reminder that they have Project 2 due next month. He says this in a jokey tone. He then says that he has already given them an extension for this project and he cannot extend the deadline any more as there are DP deadlines that need to be met. He continues the example by saying that the target market of these juices could be a high profile business executive in Sandton. He starts to tell a story. He says that this business executive has just been to Virgin Active and is now on the way to the office, and is in quite a rush, yet still would like to stop for a healthy, nutritional breakfast. He says this person would look at the packaging of the cold pressed juice, searching for the unique value propositions of this product.
16h15 – 16h20 S5	He continues the story by saying that this executive would then look at the pricing of the product to see if it is competitive. He would also need to ensure that the product is accessible to him. He gives the example of a Woolworths convenience store format at a petrol station. A student raises their hand and the lecturer tells him to go ahead. The student says that Woolworths has appealed to the gluten-free market quite effectively as they emphasize their gluten-free product range in their stores. This is a market that has been underserved in the student's view. The lecturer says that this is a very good example and checks that the class has heard it. They nod. He says that a brand like Woolworths will also target people who have an interest in environmental issues. He gives the example of consumers who would look for products created using environmentally sustainable methods, and products that are ethically sourced. He explains to the class that through these examples he is working through and applying the marketing mix. He tells them that this is how they should approach the Woolworths project (Project 2). [Link to evaluative criteria].
16h20 – 16h25	He then moves on to a slide on targeting. He tells the class not to make notes on it as everything is in the slides and in their textbook.

S6	Asks the class if they play darts. A few students nod. He says that when you play darts you will have a target in mind. A few students nod. He is using this example to explain targeting. He then goes through a few examples of brands. He says that a Rolex watch could cost R100 000, whereas a cheaper brand could be R400. He also uses the example of pens, saying that Bic pens cost a few rand, whereas Montblanc pens can be thousands of rand. He then goes on to explain that it is not as simple as price alone. There are other benefits at play, such as the association with a high quality brand. He then says that it is important to look at distribution. Going back to the example of pens he says that you can get a Bic pen almost anywhere, whereas Montblanc's distribution is very selective, and the pens are only available through a few select channels, including their own outlets. He explains that Bic, on the other hand, employs a mass marketing approach. He then goes on to the slide listing the different types of targeting – concentrated, differentiated, and undifferentiated.
16h25 – 16h30 S7	He draws on the example of Ray Ban sunglasses to explain the concept of product specialisation (which falls under 'concentrated targeting' on the slide). He says that Ray Ban has some sunglasses that will protect eyes against UV rays, or others that are specialised for outdoor wear. He also gives the example of Omega as catering to a highly specialised market. He adds that pharmaceutical products are also often very specialised. He then provides a definition for one of the concepts. He says that this is a nice definition "if any of you took it down". A few students laugh. "Have you guys heard of a brand called NAD?" He explains that this brand sells highly specialised sound equipment and their products can retail for upwards of R10 000. He then mentions a few other sound equipment brands. He then discusses the example of ASUS computers. He says that they produce high performance products that are also small enough for travel. He explains that this is how they differentiated their brand. He moves on to the concept of undifferentiated targeting on the slide. He explains that this is a more mass marketing approach, used by brands like Coca Cola. He says that Coca Cola has different variations, such as Diet Coke or Coke Zero, but overall their product is much the same and caters to a mass market.
16h30 – 16h35	He then moves on to the next slide which is on positioning, and he briefly goes through the definitions. The next slide is on brand positioning strategy and includes the following points:

S8	Perceptual maps Positioning process Positioning bases and strategy Repositioning He starts drawing on the board to explain the concept of perceptual maps. He draws one circle and writes 'VW' in it. Then he draws a second circle which overlaps the first circle at one point, and writes 'Toyota' in it. He shades in the point at which they overlap. He explains that this point of overlap represents what the brands have in common in terms of their offerings, such as good back-up service, wide dealer networks, and high quality. He then draws a third circle which is completely separate from the first two and he writes 'Rolls Royce' in it. He explains that the third circle is separate because it is a completely different product. He goes on to say that while there is a lot of similarity between the first two products, there is no similarity with Rolls Royce. He then refers to a drawing of a perceptual map with four quadrants which he drew on the board before the lecture started. The y-axis represents price, and the x-axis represents quality. Drawing on the previous car example he puts Rolls Royce in the upper right hand quadrant.
16h35 – 16h40 S9	He then explains that some brands can be expensive but not good quality, such as some fashion designer labels. He is referring to the upper left hand quadrant of the perceptual map. For the lower left hand quadrant he uses the example of TATA, the car brand, which he explains that many feel is inexpensive but also low quality. He then says the lower right hand quadrant refers to a product that is high quality but inexpensive, such as the Toyota used to be. He then refers to the list of positioning strategies on the board which he wrote before the lecture began. He tells the class that this is very relevant to their second project as well. [Link to evaluative criteria]. The first point on the list is 'attribute' and he gives the example of Heineken. He explains that they only use certain select ingredients and no additives. The second on the list is 'benefit' and he gives the example of Knorr as a healthy snack on-the-go, especially in winter. Third on the list is 'price and quality' and he gives the example of Lindt, but explains that other examples could also be Ferrero Rocher or Frey, and that there is quite intense competition between them.
16h40 – 16h45	Fourth on the list is 'use/application'. He uses the example of Jeep which became famous in the world wars, and the Vietnam war, and is highly regarded for offroad use.

S10	The fifth point on the list is 'product user' and he explains that this refers to the actual person using the product. He uses the example of Old Spice. He asks the class if they are familiar with the campaign and a few nod. He says the campaign was about smelling "like a man". The sixth point is 'product class' and he refers to the example of Hansa. He explains that this brand segmented the market by class of beer, as a pilsner, differentiating their brand from a lager. Hansa is known as lighter, crisp and brewed with a Saaz hop. The seventh point on the list is 'competitor' and he mentions the example of SAA, positioning itself as the best airline in Africa. The eighth point is 'origin' and he refers to the example of Audi known for its German engineering and technical expertise. The ninth and final point on the list is 'technology'. He refers to the example of FNB which won an award for its banking app, which he explains effectively crossed the divide between banking and technology. He asks the class if they could please spare him one more minute. He briefly discusses repositioning, saying that one could reposition a brand based on what competitors do or macro-environmental challenges. He asks students what the abbreviation is for the different macro-environmental factors, which they covered in Project 1. Nobody answers so he says, "PESTLE". He explains that one could also reposition a brand based on technology. He gives the example of cell phone companies, or pharmaceutical companies, which both rely on research and development. "Alright guys, that wraps up STP. When I see you on Wednesday we will start on Product."
After lecture S11	One student comes up to him briefly after the class to ask him a question about Project 1 which he answers.

Informal chat with lecturer after the class:

The lecturer says that many students in this class are very new to the marketing field, coming from Humanities and other disciplines. He says there are also many international students. For these reasons he explains that he pitches his lectures at a different level to how he lectures the fourth year business science students. He says that with this class if he just talks about theory their eyes start to glaze over. He is therefore trying to keep the content of the course very practical, especially when it comes to the projects, such as Project 2 which is a case study on Woolworths.

He also mentions that a few students did ask for a concession for this course but he has decided to reject a few of the applications as the previous courses the students did were not extensive enough. He says that this course forms the foundation for the other marketing courses in the programme, so it is very important that they are equipped with sufficient knowledge of the content.

Recurring themes during observation and reflections on framing and classification:

Classification:

As in the previous two lectures, the lecture slides are theoretical while the examples he gives in class are more practical. I would imagine that those students who do not attend the lectures and just study from the lecture slides would have trouble in the assessments as they would have the theoretical knowledge, but may struggle regarding how to apply it.

It seems the use of various practical examples to explain the theory is an intentional choice, as per the informal chat with the lecturer after class. The lecturer feels that the use of these practical examples will assist in making the content more accessible, especially for those who are new to the discipline. He also emphasizes the importance of this course as a foundational marketing course. The other marketing courses on the programme do build on this course to some extent.

There are a few concepts he tries to explain visually, through drawings on the board. Some concepts, like the perceptual maps, are best explained visually as they have strong visual components. Other concepts, such as the points of parity between different brands, could be explained verbally but it seems the visual explanation is an attempt to make these concepts more accessible and simplified.

Evaluative Criteria:

Interestingly, in this lecture there were far more references to evaluative criteria than in the previous two lectures. In fact, in the previous two lectures evaluative criteria were barely mentioned at all. The lecturer does discuss the more administrative side of the assessments, such as deadlines and DP, but he also hints at the content of the assessment and how the questions should be approached. In [16h15 – 16h20], for example, he gives the class direction on how they should approach Project 2, by applying the marketing mix.

In the informal chat after class, the lecturer emphasizes the importance of practical application in the projects. This suggests something important about how student work is assessed, and this is something I will have to look at in more depth when I receive the marking rubric/guide for the project.

Sequence:

Again, there are clear references to sequence in this lecture. At the beginning of the lecture the lecturer orients the class in terms of the course content and assessment.

Selection:

While the lecturer does use many practical examples to explain the content, these examples rarely include input from the students. For the most part, these examples are his own. Again, he often answers his own questions so there is not a strong focus on encouraging engagement and interaction.

In the previous lectures, and in this lecture specifically, I have been wondering if these examples are always accessible. Many of the examples he uses are of premium or luxury brands targeted at the top end of the market, and higher LSM consumers. Brands like Rolex, Montblanc and Rolls Royce are very exclusive and many students may not be familiar with them. Even if students have heard of them, it may be difficult to grasp the characteristics of these brands when the student has had no personal interaction with them. While the luxury brands do assist in explaining certain concepts, these are rarely balanced with appropriate examples from the bottom end of the market, catered to lower LSM consumers. These brands may be more familiar and accessible to some students, yet they are rarely drawn on, in favour for more up-market brands.

Another issue impacting accessibility of these examples is the fact that they are not always fully explained. In [16h05 – 16h10], for example, he discusses brands sponsoring the Rugby World Cup. While most students are likely to be somewhat familiar with the sport, I do not think all students actively follow the sport, or fully grasp the significance of a brand sponsoring the sport, and what that communicates about the brand's positioning and target market. By the same token, students may not fully understand the significance behind a luxury brand name and what it communicates about brand quality, positioning, and so on. These are not particularly complex concepts, and could be explained quite easily, but the supposed assumption that students are fully familiar with the brands themselves, as well as their significance, could disadvantage certain students and deny them access to this knowledge.

Pace:

The pace of this lecture was quite swift. In contrast to the previous two lectures, where the lecturer covered less content but went more in depth, in this lecture he seemed to make an effort to get through the content quickly so that he could start on the next section in the following lecture. As mentioned above, practical examples and their marketing significance were not always fully explained, and this may be attributed to the pace of the lecture.

Hierarchical Rules:

As in the previous lectures, the lecturer is still friendly and receptive to student questions and comments. At the beginning of the lecture he asks the class how things are going and if they feel rested after the vac, in what seems to be an effort to build rapport with the students.

A student comes to him after class to ask a question and he is very willing to help.

Appendix 2: Introduction to Marketing online modules: observation notes

Introduction to Marketing: Module 6

Outline of Module:

This section of the course is presented in a one-week module, the sixth of the course (out of a total of twelve modules). All module content is released at once, and is then available to students for the rest of the course.

The content is presented using a combination of different online learning methods, from videos, to notes, to infographics, web resources, and so on. Each module also has its own dedicated class discussion forum, which usually contains a mix of content-focussed discussion topics initiated by the facilitator, along with student questions on content and assessments. Any student has the ability to post a new thread to the forum whenever they wish. Participation in this class discussion is not compulsory, but is encouraged.

Below is the basic structure of the module. This module is divided into two units, and has 7 online learning activities (excluding the class discussion). Each learning activity is numbered, creating a suggested learning path for students. The module is bookended by two learning outcomes questionnaires. The student can rate their own competence in relation to the module learning outcomes before they begin the module, and after they complete it. This is a way for the student to monitor their own progress, and become familiar with the learning outcomes for the course. The relevant learning outcomes are also provided at the beginning of each learning activity.

Module 6

Learning Outcomes Questionnaire	A non-graded questionnaire in which students can rate their own competence in relation to the module learning outcomes *before* the start of the module.
Unit 1	
6.1 Read & Engage	Prescribed section of reading from the textbook, as well as some engagement questions on the reading.
6.2 Interactive Video	Lecture video from the facilitator including multiple-choice questions.
6.3 Practice Quiz	Non-graded multiple-choice practice questions.
Unit 2	
6.4 Read & Engage	Prescribed section of reading from the textbook, as well as some engagement questions on the reading.
6.5 Notes	A brief set of notes on the module content.
6.6 Interactive Video	Lecture video from the facilitator including multiple-choice questions.
6.7 Tutorial Discussion	A compulsory small group discussion on a focussed content topic.
Learning Outcomes Questionnaire	A non-graded questionnaire in which students can rate their own competence in relation to the module learning outcomes *after* the completion of the module.
Class Discussion	Asynchronous online discussion forum for students and facilitator.

Field Notes:

Module 6: Segmentation and Targeting

Module Descriptor: The right relationships with the right customers.

Unit 1: Segmentation

Unit Descriptor: Identify your target market: factors and variables

Suggested Unit Learning Time: +- 100 minutes

Component:	**6.1 Read and Engage: Chapter 7**
Suggested Learning Time:	+- 60 minutes
Students download a read and engage document which contains the allocated textbook reading for this section, as well as some optional enrichment questions based on the reading. These reflections are not graded or submitted, but can rather be used by students for their own studying and revision.	
Section 1	Introduction. This section introduces and defines the concepts of segmentation, targeting, positioning, and differentiation. It also includes a diagram visually representing these concepts.
Section 2	Market segmentation. This section delves deeper into the concept of segmentation, and discusses the various segmentation bases – geographic, demographic, psychographic, and behavioural. Under behavioural there are various sub-sections – occasions, benefits sought, user status, usage rate, and loyalty status. Various brands are used to explain these concepts, including Johnson & Johnson, ProNutro, and American Express.
Section 3	Using multiple segmentation bases. This section outlines the importance of using multiple segmentation bases to clearly define a market. This section also describes a common segmentation system used in South Africa – The Living Standards Measure (LSM). There is a table in this section which describes the different LSM levels, including their earnings, level of education, and access to services.
Section 4	Segmenting business markets. This section describes how business markets can be segmented. This section also includes examples, such as that of FNB which targets both individuals and businesses.
Section 5	Segmenting international markets. This section describes how firms can segment international markets. This section includes examples, such as Coca Cola, which operates in various countries.
Section 6	Requirements for effective segmentation. This section outlines and describes the MASDA framework for effectively segmenting a market.
Read & Engage section	Students are asked to apply the MASDA framework to a given brand. Students are then asked to apply the framework to their own business.

Component:	**6.2 Interactive video: The 'S' in STP - Segmentation**
Suggested Learning Time:	+- 10 minutes
A lecture video from the facilitator of the course, addressing the topic of segmentation. The style of the video is talking head with text and graphic overlays. This is an interactive video, so there are multiple choice questions which pop up during the course of the video, and which students need to answer before they can continue watching the video.	
00:00 – 01:00	The facilitator starts the video with a question, listing names of segments and asking which brand they correspond to. “To answer this question, let’s look at the S in STP. Segmentation.” She mentions segmentation, targeting, and positioning. As she lists these they appear in text on screen. She goes through the definition of segmentation and this appears on screen in text as she speaks. Then discusses a framework for effective segmentation – MASDA – and this appears on screen in text.
01:00 – 02:00	The video then pauses automatically and a multiple choice question appears on screen, which the viewer is required before the video continues playing. The question asks what MASDA stands for and the viewer is given three options to select from. Once the viewer inputs their answer, a pop-up will appear on screen that indicates whether the answer is correct or not. Then the viewer can click ‘Done’ and the video will start playing again. The facilitator then goes through and explains each of the elements of MASDA. The text appears on screen as she speaks. The facilitator then explains that once the segment has been chosen a value proposition can be created, along with appropriate marketing messages. Text summarising these points appears on screen as she speaks.
02:00 – 03:00	She explains that the brand can then consider appropriate media channels. ‘Media channels’ appears in text on screen, along with various icons depicting stylised versions of the media channels. She explains that one needs to segment the whole market before an appropriate segment or segments can be chosen. A graphic of a circle with various segments appears on screen. Then some of the segments are removed to leave a few segments behind. The facilitator then goes through the last step of the STP process – positioning. As she explains positioning, text summarising the main points appears on screen. The facilitator emphasizes that segmentation is an important first step in the STP process [orienting viewers in terms of the module content]. She then goes through the STP process again briefly, and the relevant text appears on screen.

03:00 – 04:00	The facilitator then starts on the concept of segmentation bases. She lists the four bases and as she speaks they appear as text on screen. She explains the importance of using a combination of bases rather than just one. She provides an explanation of geographic segmentation. As she speaks, text summarising the main points appears on screen. A graphic of the South African map and the map of Cape Town appear on screen. She mentions Butlers Pizza as an example of a brand that has segmented the market based on geographic factors. The brand's logo appears on screen.
04:00 – 05:00	She provides an explanation of demographic segmentation and, as she speaks, text summarising the main points appears on screen. "In Module 2 we discussed the consumer segments." She explains how these segments utilise demographic variables [Link to sequence]. Another multiple choice question pops up on screen, automatically pausing the video. The question is on the previous work covered in Module 2 that she has just referred to, and viewers are presented with five answer options. Again, a pop-up will appear once the viewer has answered, indicating whether the answer is correct or incorrect. Once the viewer clicks 'Done' the video will start playing again. The facilitator mentions First For Women insurance as an example of a brand that has segmented the market based on demographic factors, specifically gender. The brand's logo appears on screen. She provides an explanation of psychographic segmentation and, as she speaks, text summarising the main points appears on screen. She mentions Harley Davidson as an example of a brand that has segmented the market based on psychographic factors. The brand's logo appears on screen.
05:00 – 06:00	The facilitator goes on to explain how Harley Davidson is associated with the biker sub-culture, and how the popularity of the brand has led to certain brand extensions. A pop-up appears on screen allowing viewers to click on a link and be directed to a web resource on psychographic segmentation. The facilitator provides an explanation of behavioural segmentation (as well as its various sub-sections) and, as she speaks, text summarising the main points appears on screen.
06:00 – 07:00	The facilitator explains occasions segmentation (one of the sub-sections of behavioural segmentation). She uses the example of a Valentine's Day set menu at a restaurant to explain occasions segmentation. A graphic of a restaurant table and a set menu appears on screen. She explains benefits sought segmentation (one of the sub-sections of behavioural segmentation). She mentions Head & Shoulders shampoo as an example of a brand that has segmented the market based on benefits sought. The brand's logo appears on screen.
07:00 – 08:00	The facilitator then explains the final three sub-sections of behavioural segmentation – user status, usage rate, and loyalty status. She mentions Dis-Chem pharmacies as an example of a brand that draws on these three segmentation factors. The brand's logo appears on screen.

08:00 – 09:00	"To go back to the question at the beginning of the video…" The facilitator explains that these three segments mentioned at the beginning of the video refer to Vogue's three main target markets. She then goes through each of these segments and shows how the brand has used segmentation to reach these defined groups.
09:00 – 10:00	The facilitator continues explaining Vogue's target markets and how segmentation has been used to reach these groups. The facilitator then prompts students to think about the SAB brand, which they have already discussed during the course, and how they have implemented segmentation.

Component:	**6.3 Practice Quiz: Market segmentation**
Suggested Learning Time:	+- 30 minutes
A quiz consisting of 11 questions, testing students on the content from the unit. All questions are either multiple choice, true/false, or matching questions.	
Question 1-5 are based on a fictional scenario in which the student is asked to imagine that they are the marketing manager of a taxi company, and some information is presented about this company and its market.	
Question 1	Multiple choice question in which the student is asked to apply theory from the module to this scenario.
Question 2	Multiple choice question in which the student is asked to apply theory from the module to this scenario.
Question 3	True/false question in which the student is asked to apply theory from the module to this scenario.
Question 4	Multiple choice question in which the student is asked to apply theory from the module to this scenario.
Question 5	True/false question in which the student is asked to apply theory from the module to this scenario.
Question 6	Multiple choice question in which the student is asked to apply theory from the module to a scenario about a real brand.
Question 7	A matching question in which students are asked to match descriptions to theory from the module.
Question 8	A true/false question based on theory from the module.
Question 9	A multiple choice question based on theory from the module.

Question 10	A matching question in which students are asked to match descriptions to theory from the module.
Question 11	Students are presented with a scenario of a fictional business and are asked to apply theory from the module to this scenario.

Unit 2: Targeting

Unit Descriptor: Evaluate and select your segments

Suggested Unit Learning Time: +- 160 minutes

Component:	**6.4 Read and engage: Chapter 7 (cont.)**
Suggested Learning Time:	+- 45 minutes
Students download a read and engage document which contains the allocated textbook reading for this section, as well as some optional enrichment questions based on the reading. These reflections are not graded or submitted, but can rather be used by students for their own studying and revision.	
Section 1	Evaluating market segments. This section describes the factors firms should consider when evaluating market segments.
Section 2	Selecting target markets. This section defines a target market. This section also describes how firms should go about selecting a target market, and the various targeting strategies that can be employed – undifferentiated, differentiated, concentrated, etc. There is a diagram representing the various targeting strategies from broadest to narrowest. This section then goes on to explain each targeting strategy in more depth. Various examples are used to explain these concepts, including Clinique, KFC, and Pepsi.
Section 3	Socially responsible target marketing. This section outlines some of the important considerations for targeting responsibly, such as considerations when targeting vulnerable or disadvantaged customers.
Read & Engage section	The student is asked to select one of Unilever's brands and apply the theory covered in this reading to that brand and its targeting strategy.

Component:	**6.5 Notes: Target Market Selection**
Suggested Learning Time:	+- 15 minutes
A brief set of notes outlining some important considerations one must think about when selecting a target market.	
Section 1	Introduction. A short Introduction on the importance of knowing who you are targeting and how to reach them. This is followed by a list of things that a market segmentation analysis will allow one to do.
Section 2	Company vision and competencies. A short paragraph detailing important considerations when choosing a target market.
Section 3	Market definition A short paragraph detailing important considerations when choosing a target market.
Section 4	Size and growth of segment. A short paragraph detailing important considerations when choosing a target market.
Section 5	Structural attractiveness. A short paragraph detailing important considerations when choosing a target market.
Section 6	Conclusion. A short wrap-up of the main points of the set of notes.
Section 7	Bibliography.

Component:	**6.6 Interactive video: The "T" in STP - Targeting**
Suggested Learning Time:	+- 10 minutes
A lecture video from the facilitator of the course, addressing the topic of segmentation. The style of the video is talking head with text and graphic overlays. This is an interactive video, so there are multiple choice questions which pop up during the course of the video, and which students need to answer before they can continue watching the video.	
00:00 – 01:00	The facilitator refers to what was discussed in the previous video. “Now we will move on to the next step in the STP process – targeting.” [Link to sequence – orienting students in the module]. She explains what targeting involves, and how it follows on from segmentation.

	She then starts explaining the factors involved in selecting a target market and, as she speaks, text summarising the main points appears on screen. There is also reference to content covered in the previous video, which is built on here.
01:00 – 02:00	The facilitator continues explaining the factors involved in selecting a target market. A number of rhetorical questions are asked, such as “is the segment substantial?”, and “will it grow in future?” Again, these are factors to consider when selecting a target market. The facilitator begins to explain the various targeting strategies and, as she speaks, text summarising the main points appears on screen.
02:00 – 03:00	As she explaining the mass marketing targeting strategy a graphic of a space ship shining light down on a whole market of customers appears on screen. This is in an effort to show how a firm would target a whole market. Still referring to mass marketing/undifferentiated marketing, the facilitator mentions All Gold tomato sauce as a brand which employs this strategy. The video then pauses automatically and a multiple choice question appears on screen. The question asks students to select a brand they believe implements a mass marketing strategy. Once the student clicks ‘Done’ the video starts playing again. The facilitator starts explaining the next targeting strategy – differentiated marketing. The graphic of the spaceship appears again, but this time the light only shines on a few groups within the market. This is to show that differentiated marketing is more defined. She mentions the Edcon Group as an example of a brand that employs this marketing strategy. She also mentions that this brand has been discussed in the previous module. [Link to sequence].
03:00 – 04:00	She continues with the Edcon Group example, explaining its various divisions, and how each caters to a different target market. She explains in more depth how Edcon’s strategy is therefore an example of differentiated marketing. The video then pauses automatically and a multiple choice question appears on screen. The question asks students to identify the targeting strategy employed by the TFG group (a company similar to Edcon). Once the student clicks ‘Done’ the video starts playing again. Text and a graphic appear on screen. There is a brief explanation of the TFG brand, as well as a pyramid graphic showing how the various brands in this group target different markets.
04:00 – 05:00	The facilitator starts explaining the next targeting strategy – concentrated or niche marketing. The graphic of the space ship appears once again on screen. As she explains the concept, the graphic shows the space ship shining only one beam of light on a small group of consumers, in an effort to explain how niche marketing is much more defined and small-scale.

	She continues explaining the concept of niche targeting and, as she speaks, text summarising the main points appears on screen. She mentions the Coleman company which specialises in camping gear as an example of a company employing niche targeting. The video then pauses automatically and a multiple choice question appears on screen. The question asks students to select a brand that employs niche targeting, from a list of brands. Once the student clicks 'Done' the video starts playing again. The facilitator starts explaining the next targeting strategy – micro-marketing (which includes local and individual marketing). The graphic of the space ship appears again. As she explains the concept of micro-marketing, the space ship shines down one beam of light on one individual customer, who is then beamed up into the space ship. The space ship then flies away.
05:00 – 06:00	The facilitator mentions Butlers pizza delivery company as an example of a brand employing micro-marketing (and local marketing specifically). She mentions business-to-business firms as an example of companies employing individual marketing (a specific company name is not referred to). The video then pauses automatically and a multiple choice question appears on screen. The question is the same TFG question as previously. Once the student clicks 'Done' the video starts playing again. The facilitator then starts discussing how brands targeting the same markets can differentiate themselves. "To go back to the example in the previous video…" [Link to sequence]. She then starts discussing the example of Vogue from the previous video and their target market.
06:00 – 07:00	She continues explaining how Vogue has achieved success in this market. She then starts discussing the example of Cosmopolitan magazine and its similar target market. She then explains how Cosmopolitan has been able to differentiate themselves in this market.
07:00 – 08:00	She continues explaining Cosmopolitan's unique value proposition. She alludes to how this differs from Vogue. She then moves on to the next example – the US coffee market. She discusses two of the main players here, Starbucks and Dunkin' Donuts.
08:00 – 09:00	She explains how Starbucks and Dunkin' Donuts have carved out their own unique places in the market, even if they target similar markets at times. She then explains how, in the late 90s and early 2000s, Dunkin' Donuts launched a strategy to eat into Starbucks' market share, by releasing a range of high quality coffees. She then explains how Starbucks countered this with an increased focus on baked goods.
09:00 – 10:00	She continues explaining the value propositions of Dunkin' Donuts and Starbucks and how these have been achieved through various marketing elements.
10:00 – 11:00	She continues explaining the strategies of these two brands, giving various examples.

	She then ties this into how brands can target the same market yet with different value propositions – the theme of the last few minutes.
11:00 – 12:00	She then starts re-capping the main points of the video. She goes through the targeting strategies that have been discussed in the video and, as she speaks, text summarising the main points appears on screen. She then prompts students to think about two brands they are familiar with, which target the same segment, differentiate themselves in these markets. The video ends.

Component:	**6.7 Tutorial Discussion: Pick N Pay House Brands**
Suggested Learning Time:	+- 90 minutes
This is a tutorial discussion which forms part of the DP requirement for this course. The class is split into five discussion groups and given a focussed topic related to the module content, which they need to discuss with their peers and the tutors. For this discussion, students are given a detailed case study on Pick n Pay's house brands. They are then asked two questions based on this case study, and related to the theory covered in the module.	
Group 1	This thread contains 8 student posts and 2 tutor posts. Only one student posted within the time period allocated for this discussion. The other students posted after the module had already been completed. This could indicate that they were only participating to meet the DP requirement for the course, rather than with the intention to start an engaging discussion.
Group 2	This thread contains 19 student posts and 7 tutor posts. This group was much more engaged than Group 1, as most students posted within the allocated timeframe. There were a number of instances in which students would engage in a dialogue with fellow students or the tutors, rather than simply posting their own thoughts.
Group 3	This thread contains 11 student posts and 7 tutor posts. Like Group 2, most students participated in the discussion within the allocated timeframe. There was some engagement with students responding to tutor questions and engaging in dialogue.
Group 4	This thread contains 9 student posts and 6 tutor posts. Most students participated in the discussion within the allocated timeframe. There was little engagement. Most students posted their thoughts in one post and did not post again. There was also little attempt by students to engage in dialogue with other students or the tutors.
Group 5	This thread contains 11 student posts and 5 tutor posts. Most students participated in the discussion within the allocated timeframe.

	This discussion was very engaging. There were a number of instances in which students would engage in a dialogue with fellow students or the tutors, rather than simply posting their own thoughts.

Component:	**Class Discussion Forum**
Suggested Learning Time:	N/A
The class discussion forum is a space where the students, facilitator, and Course Coach can interact. In this module there are no focussed content threads, but there are a number of other threads on general course admin. In total there are 16 posts on the class discussion forum.	
Thread 1	The facilitator posts a short 'wrap-up video'. This is an informal video of her discussing the key features of the previous module, and what to expect in this module. There are no student responses on this thread.
Thread 2	This is a thread from the facilitator explaining how students can sign up for optional feedback sessions with their tutor for the group project. There are also follow up posts from the facilitator explaining how to access the sign-up sheet. There are no student responses on this thread.
Thread 3	This is a detailed feedback post from the facilitator explaining some of the key feedback for a past assignment. The facilitator also includes good student examples taken from the class and posted anonymously. A student asks a question about word limits for the assignments and the facilitator clarifies. Another student posts to say thank you for the feedback.
Thread 4	This is another wrap-up video. Because this module falls just before the mid-term vac, this wrap-up video is posted at the end of this module, and just before the vac begins. There are no student responses on this thread.
Thread 5	This is a detailed feedback post from the facilitator explaining some of the key feedback for another past assignment. The facilitator also includes good student examples taken from the class and posted anonymously. A student posts to say thank you for the feedback, and to say that it is very helpful.

Recurring themes during observation and reflections on framing and classification:

Classification:

Practical examples of how the theory can be applied are used throughout the module. In the first video, for example, each segmentation base is illustrated with an example.

In the second video, a number of in-depth case studies are used to explain the theory, including those of Starbucks and Dunkin' Donuts. This differs quite a bit to the contact course lectures in which fewer in-depth case studies are used. In the contact classes it is more common for the lecturer to mention various brands, with little contextualisation.

Sequence:

Interactive videos are used in this module. This impacts sequencing as students have to answer MCQs at certain points during the video. The use of interactive videos is also an attempt to keep students engaged. Videos are generally considered quite a passive learning activity. The insertion of multiple choice questions, however, means that the student needs to actively engage with the content and, hopefully, pay attention throughout. This is similar to a strategy lecturers use in contact classes, pausing at certain intervals to pose a question to the class to ensure they are still paying attention. Unless the lecturer picks on certain students, however, students do not have to answer these questions, whereas in the interactive video the student has to answer the question for the video to continue playing.

The content covered in this study – segmentation, targeting, and positioning, referred to as STP – is a sequence itself, as each step should be carried out in that order to achieve the desired outcome. The facilitator does allude to this sequence in the first video at [02:00 – 03:00] when she explains segmentation in the context of the broader STP process, in an attempt to orient students within the content. In the second video at [00:00 – 01:00] she orients the students once again by explaining the next step in the STP process and how this builds on the previous step. There are also a number of other references to previous content, such as when she refers to Module 2 content in Video 1 at [04:00 – 05:00], and in the second video at [02:00 – 03:00] when she discusses the Edcon brand used previously in the course as an example, and also in the second video at [05:00 – 06:00] when she refers to the Vogue example from the previous video. At the end of Video 2 there is a clear re-cap of the content.

Selection:

For the most part, the facilitator has decided which content to cover and which examples to use in this module. There are a few instances in which students are prompted to select their own practical

examples, such as in the read & engage activities, and in Video 2, although these activities are not assessed and students are not provided feedback on their thoughts.

It is interesting to note that in the online course only four segmentation bases are discussed, whereas in the contact lectures, five segmentation bases are used. It seems that similar content is being covered. The fifth base ('needs and benefits') in the contact course is covered as a sub-section under 'behavioural' in the online course.

Pace:

The structure of this online course, including the fact that the new module and all its content is released every week at once, leads to relatively weak framing over pacing. Students could go through all the content on the very first day of the new module, they could stretch it out over the week, or they could even come back to it during later modules of the course. This means that, in general, there is relatively weak framing over pacing.

The suggested learning time allocations in the learning path can assist students in planning their study time. These suggested learning time allocations are instances in which the framing over pacing is a bit stronger, although it is impossible to enforce these time allocations in reality – they are merely suggestions. At times, however, the suggested learning times do not seem very accurate. The first video in this module, for example, is just under 10 minutes and the suggested learning time is 10 minutes. This suggested learning time does not account for the student pausing the video to make notes, or to re-watch certain sections. Because core theory is covered in these videos it is unlikely that the student will only watch them once. The second video in this module has a suggested learning time of 10 minutes, yet the video itself is almost 12 minutes long.

Evaluative Criteria:

There is little reference in the videos, or elsewhere in the course content, as to how this content will be assessed. While the facilitator does demonstrate in the videos how theory could be applied to practical case studies, it is never made explicit that this is the expectation for the assessments.

There are 11 questions in the practice quiz in this module. Of these 11, 7 are application questions, while 4 are purely theory questions. Questions 1-5 are also based on a single scenario. The emphasis on application rather than pure recall of theory seems to accurately reflect the expectations of the assessments in this course. This alignment can be explored in more depth when the assessment for this section is covered.

The tutorial discussion in this module is a long case study followed by questions where students are asked to apply theory from the module to this case study. Again, this focus on application to a case study seems to accurately reflect the expectations of the assessments in this course. In fact, this

particular case study has been used in a previous presentation of the course for a test, so it should be very helpful in showing students what to expect in a test or exam.

The facilitator seems to offer quite a bit of support to students when it comes to assessments, yet it appears that students do not always take full advantage of that support. There is a thread in the class discussion, for example, regarding group project support sessions, as well as two detailed feedback posts on previous assignments. There are very few student responses on these threads.

Hierarchical Rules:

Given the ratio of tutor to student posts in the tutorial discussion, it is clear that this format allows for quite a high level of engagement, as well as personalised responses.

The wrap-up video posted on the class discussion forum is a casual and conversational form of communication and support from the facilitator to the class. It is also helpful in addressing any relevant presentation-specific issues, as the majority of the content on the online courses is pre-created, and therefore allows for little flexibility.

Introduction to Marketing: Module 7

Outline of Module:

This section of the course is presented in a one-week module, the seventh of the course (out of a total of twelve modules). All module content is released at once, and is then available to students for the rest of the course.

The content is presented using a combination of different online learning methods, from videos, to notes, to infographics, web resources, and so on. Each module also has its own dedicated class discussion forum, which usually contains a mix of content-focussed discussion topics initiated by the facilitator, along with student questions on content and assessments. Any student has the ability to post a new thread to the forum whenever they wish. Participation in this class discussion is not compulsory, but is encouraged.

Below is the basic structure of the module. Please note that while this module has three units, only the first unit as well as one element from the third unit are included in this particular study. Unit 1 has 3 online learning activities. Each learning activity is numbered, creating a suggested learning path for students. The module is bookended by two learning outcomes questionnaires. The student can rate their own competence in relation to the module learning outcomes before they begin the module, and after they complete it. This is a way for the student to monitor their own progress, and become familiar with the learning outcomes for the course. The relevant learning outcomes are also provided at the beginning of each learning activity.

Module 7	
Learning Outcomes Questionnaire	A non-graded questionnaire in which students can rate their own competence in relation to the module learning outcomes *before* the start of the module.
Unit 1	
7.1 Read & Engage	Prescribed section of reading from the textbook, as well as some engagement questions on the reading.
7.2 Notes	A brief set of notes on the module content. This set of notes also includes two embedded interactive lecture videos.
7.3 Class-wide Forum	An optional class discussion on a focussed content topic.

Unit 2	
Not covered in this study.	
Unit 3	
Only one element in this unit covered in the study.	
7.11 Live Tutorial	A live session, hosted by the facilitator, in which students participate in a guided activity, based on content from the module.
Learning Outcomes Questionnaire	A non-graded questionnaire in which students can rate their own competence in relation to the module learning outcomes *after* the completion of the module.
Class Discussion	Asynchronous online discussion forum for students and facilitator.

Field Notes:

Module 7: Positioning and Branding

Module Descriptor: Guiding perceptions, building identity.

Unit 1: Positioning

Unit Descriptor: Defining your place in the consumer's mind.

Suggested Unit Learning Time: +- 185 minutes

Component:	**7.1 Read and engage: Chapter 7**
Suggested Learning Time:	+- 45 minutes
Students download a read and engage document which contains the allocated textbook reading for this section, as well as some optional enrichment questions based on the reading. These reflections are not graded or submitted, but can rather be used by students for their own studying and revision.	
Section 1	Differentiation and positioning. This section contains a definition of positioning, as well as examples of how various car brands are positioned.

	This section also contains other examples of brands and their positions, such as OUTsurance, FNB, and Standard Bank.
Section 2	Positioning maps. This section explains positioning or perceptual maps. An example of a positioning map is included. This map features various car brands that are positioned in relation to reliability and safety.
Section 3	Choosing a differentiation and positioning strategy. This section outlines the steps brands must take in positioning and differentiating their offering.
Section 4	Identifying possible value differences and competitive advantages. This section explains the concept of a competitive advantage. This section also outlines how brands should differentiate themselves from competitors. Various examples are used to explain these concepts, including Unilever, Volvo, and Amazon. This section goes on to discuss what kinds of difference can be promoted.
Section 5	Selecting an overall positioning strategy. This section explains the concept of a value proposition. This section also includes a table that outlines various value propositions, including 'more for more' and 'the same for less'. This section then goes on to describe each value proposition in more detail. Various examples are used to explain these propositions, including Mercedes, Dell, and Kulula.
Section 6	Developing a positioning statement. This section explains the concept of a positioning statement and also provides a template for creating a positioning statement.
Section 7	Communicating and delivering the chosen position. This section details the importance of the brand actually living up to the promise made in their positioning statement. The section also emphasizes the importance of consistently communicating that position.
Section 8	Chapter review. This section briefly summarises the main points from the chapter, and also provides questions and answers based on content from the chapter.
Read & Engage Section	Students are asked to come up with their own example of a brand and apply the theory covered in the reading to that brand.

Component:	**7.2 Notes: Positioning**
Suggested Learning Time:	+- 80 minutes

A set of notes on the topic of positioning.	
Section 1	Introduction. The set of notes begins with a few quotes on positioning. This section also includes a definition and explanation of the concept of positioning.
Section 2	Positioning in perspective. A list of the things that positioning aims to achieve.
Section 3	From position to positioning. This section explains the difference between a position and the process of positioning. It also explains the concept of a positioning statement.
Section 4	Positioning statement. This section includes another definition of a positioning statement. It also explains how this links to the concept of differentiation. There is a list of the factors that make an effective positioning statement. There are also steps to creating a positioning statement and an example of a completed positioning statement.
Section 5	Positioning in action. This section outlines some of the important considerations in positioning.
Section 6	Principles – check. There is a list of questions that companies need to ask before deciding on their positioning statement.
Section 7	Principles – Forfeiting potential customers. This section outlines the importance of focussing on a defined target market, even if this means forfeiting potential customers.
Section 8	Principles – Simplicity and consistency. This section outlines the importance of creating a position that is simple and consistent. There is a list of brands and their positions, including Levi's, Walmart, and Volkswagen. This section also includes a brief case study on Pepsi's positioning, and a video from YouTube on one of their campaigns.
Section 9	Principles – Authenticity. This section outlines the importance of having an authentic positioning.
Section 10	Generic types of positioning – Attribute or benefit. This section provides an explanation of what positioning by attribute or benefit involves.
Section 11	Generic types of positioning – Price or quality. This section provides an explanation of what positioning by price or quality involves.
Section 12	Generic types of positioning – Use or application.

	This section provides an explanation of what positioning by use or application involves. The example of Kulula is used here.
Section 13	Generic types of positioning – User or user group. This section provides an explanation of what positioning by user or user group involves. A number of examples are used here, including Trevor Noah for Cell C, and Farmer Brown Chickens.
Section 14	Generic types of positioning – Product class. This section provides an explanation of what positioning by product class involves. The example of the iPod is used. This section also refers to perceptual maps, and a graphic of a perceptual map is provided. This perceptual map represents the athletic footwear market and includes various brands, such as Sketchers, Converse, and Reebok. On the y-axis is 'expensive' and 'cheap' at the two extremes. On the x-axis is 'performance' and 'fashion' at the two extremes.
Section 15	Generic types of positioning – Competitor. This section provides an explanation of what positioning by competitor involves. This section does make reference to the Advertising Standards Authority of South Africa, with a link to their website, as comparative advertising is heavily restricted in this country. Three YouTube videos are included as examples of comparative advertising, including ads from Verizon, and the back-and-forth comparative advertising between BMW and Mercedes Benz.
Section 16	Parity and difference. This section explains the importance of differentiating from competitors, while also fulfilling the basic requirements of a product category. The concepts of 'points of difference' and 'points of parity' are explained.
Section 17	Conclusion. This section wraps up the key points in the set of notes. It also includes two lecture videos which expand on the notes.
Section 18	Bibliography
Component:	**7.2 Notes: Positioning**
Suggested Learning Time:	+- 80 minutes

As mentioned above, there are two lecture videos embedded in this set of notes. This section describes **Video 1**. A lecture video from the facilitator of the course, addressing the topic of positioning. The style of the video is talking head with text and graphic overlays. This is an interactive video, so there are multiple choice questions which pop up during the course of the video, and which students need to answer before they can continue watching the video.	
00:00 – 01:00	The facilitator starts the video by posing a question. Asking the viewer which clothing brand has positioned itself on certain qualities, including "individualism" and "confidence". Before answering the facilitator starts explaining the concept of positioning. As she speaks, the main points are summarised in text on screen. As she explains the concept a graphic of the human brain appears on screen. Refers to a previous section – perception, covered in Module 2 of the course [Link to sequence]. She explains that perception can often become a consumer's reality. As she says this, an animation of an older man looking in the mirror appears on screen. The reflection in the mirror is more attractive than the man himself, demonstrating that people can perceive things quite differently to how they are in reality.
01:00 – 02:00	The facilitator continues explaining the importance of positioning. She refers back to content from Module 2 again. [Link to sequence]. A multiple choice question pops up on screen, automatically pausing the video. The question is on the previous work covered in Module 2 that she has just referred to, and viewers are presented with three answer options. A pop-up appears once the viewer has answered, indicating whether the answer is correct or incorrect. Once the viewer clicks 'Done' the video starts playing again. The facilitator then continues discussing this content from Module 2 and demonstrates how this relates to positioning. [Link to sequence].
02:00 – 03:00	The facilitator then starts discussing brand equity and how it links to positioning. A multiple choice question pops up on screen, automatically pausing the video. The question is on brand equity, and viewers are presented with three answer options. A pop-up appears once the viewer has answered, indicating whether the answer is correct or incorrect. Once the viewer clicks 'Done' the video starts playing again. She continues explaining the benefits of brand equity. As she speaks, the main points are summarised in text on screen. She then answers the question posed at the beginning of the video by explaining how the Levi's clothing brand has created their positioning. She also explains how a recent Levi's campaign reinforced this positioning.
03:00 – 04:00	She starts explaining how brands can create, reinforce, and alter a positioning. She refers to the 4 P's – a concept covered earlier in the course. [Link to sequence]. A graphic of a television screen appears on screen, with a brand logo. The facilitator then shows, step-by-step, how the Levi's brand has applied the 4 P's to create its positioning.

04:00 – 05:00	She continues explaining how Levi's has applied the 4 P's to create its positioning. A multiple choice question pops up on screen, automatically pausing the video. The question is on brand positioning, and viewers are presented with four answer options. A pop-up appears once the viewer has answered, indicating whether the answer is correct or incorrect. Once the viewer clicks 'Done' the video starts playing again. The facilitator starts explaining the concept of differentiation, which is closely tied to positioning. As she speaks, the main points are summarised in text on screen. She also applies this concept to the Levi's brand.
05:00 – 06:00	The facilitator continues explaining how the Levi's brand has created a differentiated offering. She then starts discussing the positioning of another denim brand – Guess. She compares the positioning of both brands. She then explains how both have been able to differentiate their brands. She then starts summarising the main points covered in the video.
06:00 – 07:00	She continues summarising the main points covered in the video. She says that in the video they have looked at how Levi's created their unique position in the market. She asks the viewer to now think about how the Guess brand has created their unique position in the market. The video ends.

Component:	**7.2 Notes: Positioning**
Suggested Learning Time:	+- 80 minutes
As mentioned above, there are two lecture videos embedded in this set of notes. This section describes **Video 2**. A lecture video from the facilitator of the course, addressing the topic of positioning. The style of the video is talking head with text and graphic overlays. This is an interactive video, so there are multiple choice questions which pop up during the course of the video, and which students need to answer before they can continue watching the video.	
00:00 – 01:00	The facilitator briefly re-caps what was covered in the previous video – Video 1. [Link to sequence]. She poses a question to the viewer, asking how one can evaluate whether a brand's positioning is strong and distinctive. She then starts explaining the positioning framework and lists the four factors of it. As she speaks, the main points are summarised in text on screen. There are also small icons used to represent each of the factors. E.g. 'true' is represented by an image of somebody's hand on a bible. She then starts explaining each factor in the positioning framework in more depth, starting with 'true'.

01:00 – 02:00	She draws on the example of Levi's from the previous video to explain 'true' positioning. She demonstrates how Levi's positioning is true. She then starts explaining the next factor – 'believable'. She uses the example of the retailer, PEP, to explain this concept.
02:00 – 03:00	She continues explaining the PEP example. She then starts explaining the next factor – 'relevant'.
03:00 – 04:00	She starts explaining the final factor – 'differentiated'. She says that many brands have made errors in their positioning by not following the factors in this framework. She explains the current positioning of McDonald's as an example.
04:00 – 05:00	She explains that McDonald's attempted to counter the current unhealthy image of the brand. She says that while this move may have been believable, it was not true, as the salads often had more calories than the burgers. She explains that many new restaurants fail each year because they cannot provide an offering that is differentiated, even though it may be relevant.
05:00 – 06:00	She explains how important differentiation is in this example of the restaurant industry. She uses the example of the restaurant Stardust in Cape Town as one that is differentiated, as they have live performances by the waiters. She then cautions the viewer against creating a positioning that is differentiated, but not relevant to the target market. She used the example of Greenworx cleaning products, as the first brand to introduce eco-friendly cleaning products.
06:00 – 07:00	She continues with the example of Greenworx cleaning products and explains that eco-friendliness was not top of mind for these consumers and, therefore, the offering was not relevant. She then asks the viewer, as a re-cap, what the four factors of effective positioning are. A multiple choice question pops up on screen, automatically pausing the video. The question is on the four factors of effective positioning that she has just referred to, and viewers are presented with five answer options. A pop-up appears once the viewer has answered, indicating whether the answer is correct or incorrect. Once the viewer clicks 'Done' the video starts playing again. She then starts on the concept of perceptual maps. As she speaks, the main points are summarised in text on screen.
07:00 – 08:00	She explains how the perceptual map will look, but there is no actual image of a perceptual map on screen. She explains that the two most common factors to look at when creating one of these maps are price and quality. An example of a map then appears on screen. It is a map representing various chocolate brands positioned in relation to each other based on price and quality. She refers to M&Ms and its positioning, and this brand is then highlighted on screen. She does the same for Lindt.

	She then explains that other attributes can be used when positioning brands, other than just price and quality. It depends on which factors are most important to the target market.
08:00 – 09:00	Continuing this discussion, she explains that for toothpaste, the attributes may be fresh breath, whitening, or sensitivity, whereas for yoghurt the attributes could be flavour, volume, or pack size. Another example of a perceptual map appears on screen, this time representing car brands. On the y-axis are two extremes of 'classy' and 'affordable', while on the x-axis are two extremes of 'conservative' and 'sporty'. She refers to VW and its positioning, and this brand is highlighted on screen. She then refers to Porsche and its positioning, and this brand is highlighted on screen. A multiple choice question pops up on screen, automatically pausing the video. The question is on the Volvo brand and its positioning related to this perceptual map that has just been discussed, and viewers are presented with four answer options. A pop-up appears once the viewer has answered, indicating whether the answer is correct or incorrect. Once the viewer clicks 'Done' the video starts playing again.
09:00 – 10:00	She then explains why the perceptual map is a useful tool and what it can be used for. She then re-caps the key points covered in the video. As she speaks, the main points are summarised in text on screen. The video ends.

Component:	**7.3 Class-wide Forum: Repositioning LVMH**
Suggested Learning Time:	+- 60 minutes
This is a focussed class discussion topic. Students are presented with a case study and a number of articles on the luxury brand LVMH and their repositioning. The class is then asked to share their own examples of brands which have repositioned themselves, tools used to do so, and whether these repositioning efforts were successful.	

Unit 3: Managing brands

Unit Descriptor: Decisions and metrics - the measures of success.

Suggested Unit Learning Time: +- 115 minutes

[Please note that only one learning activity from this unit will be covered in this study].

Component:	**7.11 Live Tutorial: Fruit & Veg vs Food Lover's Market**
Suggested Learning Time:	+- 60 minutes
The live tutorials and workshops on this programme take place through Adobe Connect software. Students sign up for a specific time slot in which to attend any scheduled live tutorials for the course. This is a synchronous learning activity, unlike the other course components which are mainly asynchronous. The facilitator or Tutor hosts the session and up to 25 students can attend during one slot. The facilitator prepares PowerPoint slides beforehand which are then shared on the screen throughout the session. Attendees do not have access to video functionality, but everyone has access to a mic and can therefore contribute verbally. There is also a 'chat box' where students can type comments or questions. This is visible to all students. If students want to ask a question or contribute to the session, they can click on the 'raised hand' icon. The facilitator will then give them permission to speak, they will unmute their mic and start speaking. Once they have finished, they will mute their mic again. This system, in which the facilitator gives students permission to speak upon request, mirrors a classroom or lecture, where students raise their hands and are then given permission to speak. The Adobe Connect software also allows for break-out rooms. This means that the facilitator can split students up into smaller groups (usually of about 4-6 students) and place them in private 'rooms'. The facilitator usually provides a task or activity to complete in these break-out rooms. These rooms are separate from the main room, so only the students in that break-out room can hear what each other are saying. Within this room students are able to type on a notes pod which appears on screen. The facilitator can then bring up this notes pod on screen in the main room during the report back/feedback session.	
00:00 – 05:00	The facilitator begins the session. She starts by giving the class some time to provide any feedback they have on the course, and discuss how things are going thus far. One student provides some feedback on what she has enjoyed about the course that she has not experienced in previous marketing courses. Another student comments in the chat box that it can be tough to manage various deadlines, class discussions, and group work. The facilitator says that she understands that parts of the course can be quite challenging. She provides some guidance for students on managing their time effectively, such as spending less time on the discussions in busy weeks, as these activities are not graded.

	She also reassures the class that it is fine to simply pass the course. She says that some people are aiming to pass with Firsts, but for others lack of time may mean they are simply aiming to pass the course, which is also fine. She advises students to think about how much time they have available to dedicate to their studies, and to plan accordingly. Another student comments in the chat box saying that the course can be quite challenging. The facilitator reminds the students that the qualification should be challenging because it is a prestigious programme. She reassures the students that they have been selected by the programme convener because they are considered capable, so they should remember that this is an achievement. Another student says that, while the course is challenging, she is enjoying it as this is the course she was most looking forward to, and a subject that she is very interested in. She says that she has not received the grades she would have liked, but this is also motivation to not become complacent and to keep working hard. The facilitator responds and says it is a good thing to have that learning curve and for the course to be challenging. She reminds the class that this is a two year programme so if they were getting 90s for every assignment, there would not be much to learn over the course of the next two years. Another student says that the challenge for him is doing group work online, without seeing peers face-to face, and therefore missing some of those visual cues, and making it harder to build rapport.
05:00 – 10:00	The facilitator says she knows what the student mean. She says that with discussion forum communication it can be quite hard to sense tone. A student asks a question. She says that in the tutorial discussions the first students to comment often cover most of the points, and she does not know how to extend and enrich the discussion. The facilitator says that she understands the concern. She says that the tutorial discussions should flow quite conversationally. She says that it is also fine to go off on tangents, as one would in a conversation. She reminds students that they do not have to approach the discussions as they would an essay – with a carefully structured response. Another student says she has struggled with the assessments in the course, specifically how to structure her essays and assignments.
10:00 – 15:00	The facilitator acknowledges that it can be challenging to answer in the essay format if one is not used to it, but it is very important to look at and incorporate feedback from previous assignments, as well as the general feedback posted by the facilitator on the discussion forums. She says that she can see many students are making the same mistakes again and again, indicating that they are not taking the feedback into account. The facilitator also says it is important to approach the assignments as convincing the marker of one's position, and building up a solid argument throughout the

	essay. She explains that the emphasis is not on repeating theory and definitions, but rather on analysing the case at hand and providing a meaningful response. The facilitator then starts getting on to the content of the session. The first slide asks the question, “what is positioning?” The facilitator asks if anyone can provide an overview of what they understand by the term positioning. A student responds with a basic definition. Two other students also respond, emphasizing the importance of perception. The facilitator moves on to the next slide, which shows a graphic of a “consumer’s mind”, with various brands in it. The slide also includes a definition of positioning, which the facilitator chats through and expands upon. The facilitator moves on to the next slide which asks the question, “what framework can we use to create an effective position?” The facilitator refers to the four factors covered in one of the videos in Unit 1, and asks if anyone can remember those four factors.
15:00 – 20:00	A student asks if the facilitator is referring to the various value propositions, including ‘more for less’, ‘more for the same’, and so on. The facilitator says that is not what she is referring to, and moves on to the next slide with the four factors listed to show students what she is referring to. She asks the class if anyone would like to expand on any of the factors. A student explains the first factor in more depth. Another student reiterates one of the main points from the video. The facilitator says this is a great point. Another student explains one of the factors in more depth in the chat box. The facilitator also acknowledges this point. The facilitator then goes on to explain the four factors in more depth. The facilitator then moves on to the next slide which asks, “what is a perceptual/positioning map? Why is it useful?” The facilitator moves on to the next slide which displays an example of a positioning map of the athletic footwear market. She provides more context on this map. She asks the class if anyone wants to discuss why they find positioning maps useful. A student starts explaining the value of seeing one’s brand relative to competitors. The facilitator says this is a good point. Another student says that it also allows you to see a gap in the market where your competitors may not be dominant.
20:00 – 25:00	The facilitator acknowledges the student’s point.

	Another student makes a point regarding the usefulness of the positioning map. The facilitator thanks the student for their point. Another student reiterates the point about finding a gap in the market. The facilitator moves on to the next slide which asks, “what about repositioning?” The facilitator asks the class why repositioning would be necessary for some brands. A student says that it could possibly be an attempt at growth. The facilitator acknowledges this as well as another comment in the chat box. Another student suggests that brands need to reposition due to changing customer needs. The facilitator moves on to the next slide which shows a few bullet points on repositioning and why it is done. She provides further explanation on these points. The facilitator moves on to the next slide which asks, “what is branding?” Then to the next slide which provides the definition of branding.
25:00 – 30:00	The facilitator further expands on this definition. The slide also asks, “why is a brand valuable and useful for both consumers and the brand itself?” She poses this question to the class. A student says that branding is important to set you apart from competitors and for ease of identification. The facilitator acknowledges and expands on these points. Another student discusses the features from a consumer perspective and the facilitator acknowledges this. A few students add points in the chat box. Another student discusses the ability of brands to say something about the people who buy them. The facilitator acknowledges and expands on this point. The facilitator then moves on to the next slide which lists the features of branding. She chats through each point and expands on them.
30:00 – 35:00	The facilitator continues chatting through these points. The facilitator thanks the class for all their points and moves on to the next slide which introduces the break-out room activity. The break-out room activity is on the repositioning of Fruit & Veg City into the Food Lover’s Market brand. The facilitator goes through the questions students need to address in the break-out room activity and provides further explanation.

	The facilitator tells the class they will have about 15 minutes in the break-out room to discuss these questions. She asks the class if anyone has any questions on this before they begin. The class then goes into the break-out rooms.
35:00 – 40:00	The class is in the break-out rooms.
40:00 – 45:00	The class is in the break-out rooms.
45:00 – 50:00	The class is in the break-out rooms. The facilitator ends the break-out rooms and brings everyone back into the main room. She asks that one representative from each group briefly presents to the class on the main points from that group, in about 3 minutes. She brings up the notes from Group 1 on screen and asks the representative from that group to begin. The representative from Group 1 presents on that group's main points. The facilitator thanks them for their contribution and acknowledges some of their strong points. The facilitator then brings up Group 2's notes and asks them to present. The representative from Group 2 presents on that group's main points.
50:00 – 55:00	The representative from Group 2 continues presenting. The facilitator thanks them for their contribution and acknowledges some of their strong points. She also provides some additional points that the two groups have not covered. She links this back to repositioning. The facilitator moves on to the last slide which allows time for any questions. She asks the group if they have any other questions as they have reached the end of the session. Nobody has any questions so the facilitator says that if any questions come up they can ask her on the discussion forums. She says thank you and have a good Monday. A few students comment in the chat box thanking her for the session. The session is dismissed but one student stays behind to ask a question. He says that he has asked a question on the discussion forum but has not received a response. He repeats the question which is on the major assignment. The facilitator answers the question, referring to a previous announcement.

	Another student has also stayed behind to ask a question. It is a question on one of the assignments and one of the requirements. The facilitator answers the question and gives examples of how they could approach this assignment. The student asks a few follow-up questions which the facilitator answers. The student thanks her and says that it has really helped. The facilitator says “have a good day”.

Component:	**Class Discussion Forum**
Suggested Learning Time:	N/A
The class discussion forum is a space where the students, facilitator, and Course Coach can interact. This module is structured a bit differently than usual in that the focussed content discussion (on LVMH) actually forms part of the learning path. Other than this discussion, there are no other focussed content discussions, but there are quite a few general course threads. In total there are 57 posts on the class discussion forum. 33 of these are on the LVMH thread.	
Thread 1	Focussed content discussion on LVMH (discussed above).
Thread 2	A post from the facilitator acknowledging technical issues experienced in one of the live tutorials, and providing links for students to join other tutorial sessions if necessary. There are no student replies on this thread.
Thread 3	On this thread a number of students have expressed difficulties in accessing the live tutorials due to technical glitches. The facilitator addresses these questions.
Thread 4	A student asks the facilitator is they may be excused from the live tutorial as they are sick. The facilitator asks the student to liaise with their course coach.
Thread 5	After the live tutorials have been completed, the facilitator posts the PowerPoint slides from these sessions. There are no student replies on this thread.
Thread 6	The facilitator provides detailed feedback on an assignment that had been marked and released to students. There are no student replies on this thread.
Thread 7	The facilitator provides a detailed post with guidance for an upcoming submission.

	Within this post the facilitator advises students to re-look at feedback from previous submissions, as well as referring them to the assessments module where there are resources which assist students in answering case study questions. The facilitator advises students on how they should approach the case study and the questions. She also poses a few questions that students to address in answering the assignment question. She addresses the word limit, and asks students to post any other questions on this thread. One student thanks her for the feedback and briefly explains what they included in their essay. Another student asks a question about how to interpret the assignment question and what is expected of students. The facilitator answers the question and provides guidance, referring to her detailed post above. The same student then asks a question about how much additional research should be conducted for this assignment. The facilitator answers advising that some external research should be conducted, but most of the information is available in their module content.

Recurring themes during observation and reflections on framing and classification:

Classification:

The facilitator draws on a number of practical examples throughout the module to show how the theory could be applied practically.

The facilitator often uses more in-depth or better explained examples, as compared to the contact lectures. In Video 1 in this module, for example, the Levi's case study is quite a detailed one that she spends a number of minutes explaining.

Sequence:

As explained in the previous module, the interactive videos impact the sequence of the content. They also keep students engaged.

The facilitator makes clear links to previous content throughout the module. In Video 1 at [00:00 – 01:00] she refers back to Module 2. At [01:00 – 02:00] she makes meaningful links with the Module 2 content, which demonstrates that all the theory from the course can be meaningfully integrated, rather than being consumed in separate silos. At [03:00 – 04:00] she refers back to the 4 P's which were introduced earlier in the course.

In Video 2 at [00:00 – 01:00] the facilitator re-caps what was covered in Video 1. At [09:00 – 10:00] she re-caps what was covered in Video 2.

These links to sequence could be helpful to students in orienting themselves in the course.

Selection:

In most of the course content, such as the videos and notes, the practical examples are given by the facilitator.

There are a few instances where students are able to select their own practical examples. In the focussed class discussion on LVMH students are given the LVMH case study, but then are asked to provide their own examples of brands who have repositioned in the discussion itself.

In the read & engage tasks students are also prompted to think up their own examples in relation to the theory covered, although these are not graded and students do not receive feedback on these.

It seems that there is weaker framing over selection in the online course than in the contact course as students have a bit more control over selection in the online course.

Pace:

The structure of this online course, including the fact that the new module and all its content is released every week at once, leads to relatively weak framing over pacing. Students could go through all the content on the very first day of the new module, they could stretch it out over the week, or they could even come back to it during later modules of the course.

The live tutorial is one of the only elements of this course that features strong framing over pacing, as students have to participate at a specific pre-selected time. It is one of the only synchronous activities during the course, unlike the discussions which are asynchronous.

It is also interesting to note the strong framing over pacing *within* the live tutorial session itself. While students are free to contribute during the session, the facilitator still has the most control over the pace of the session. For the most part, she decides how long is spent on each section, when to move on to the next slide, how long students have in the break-out rooms, and she even tells them how long they should take to do their report back [live tutorial 45:00 – 50:00].

Evaluative Criteria:

There is little reference in the videos, or elsewhere in the course content, as to how this content will be assessed. While the facilitator does demonstrate in the videos how theory could be applied to practical case studies, it is never made explicit that this is the expectation for the assessments.

Expectations for assessments are made more explicit through more informal avenues of the course, such as the discussion forums and the live tutorials.

In Thread 7 on the class discussion, for example, the facilitator provides a detailed post on various pointers for one of the upcoming assessments and how to approach the question.

The facilitator provides some time at the beginning of the live tutorial for students to provide feedback on how the course is going and ask any questions. Many of the student questions relate to the assessments and the course workload. Within the first 15 minutes of the live tutorial the facilitator provides the students with guidance on the expectations of the assignments and discussions. Much of this is general guidance on how to approach the course in an efficient manner, such as prioritising graded activities, and spending less time on ungraded activities.

Within the first five minutes of the live tutorial the facilitator mentions that grade expectations should not be particularly high at the start of the programme. She says that students should not be expecting to achieve 90s at the start of the programme. This could give students some vague indication of what marks they should be expecting, but it is not specific.

At [05:00 – 10:00] of the live tutorial the facilitator provides some guidance on how to approach the discussions and what level of input is expected. At [10:00 – 15:00] she provides some very general guidance on how to approach the assignments in the course.

Something to consider is whether practical guidance on the assessments should be formally incorporated into the learning path. While the live tutorials and class discussions are available to everyone, students may not think to go there when studying or revising for the assessments. While the discussion forum posts remain online and can be referred back to throughout the course, the live tutorial session recordings are not provided to students, and some students do not attend these sessions, so guidance provided there regarding the assessments may not be available to all students.

Hierarchical Rules:

Any student is able to post questions on the class discussion for the facilitator at any time. The facilitator has responded to every question on this class discussion.

The live tutorial has a few instances of weakened framing over hierarchical rules. The facilitator dedicates the first 10 – 15 minutes of the session to student feedback and questions. This will likely go some way to making students feel supported, even in the event that the feedback is not implemented in the course going forward. It is significant that time is dedicated to support, rather than just purely academics.

The facilitator does show support and reassurance during this session. There are a few instances where she acknowledges students' difficulties and says that she understands their concerns. She tells students that is fine to aim for a pass, for example, rather than feeling pressure to get a First. She also tells students that they have been selected for this prestigious programme for a reason. This could go some way to boosting their confidence.

The facilitator also carves out time for student questions at the end of the session, and stays on after the live tutorial has ended to answer students' questions on the assessments.

During the live tutorial session itself, students do need to 'raise their hand' and the facilitator needs to grant them permission to speak. This clearly indicates that the facilitator is still in control of the session, even though interaction is highly encouraged. These requests for permission to speak mirror the contact courses. In the live tutorial session, however, students can write comments in the chat box whenever they like, without permission. This could be a helpful tool for those who do not feel confident enough to participate in the class vocally.

The level of one-on-one interaction and student support present in the live tutorial was not as observable in the contact classes. Most of the class time in the contact course was dedicated to academic content, and there were no instances where students provided feedback on how the course was going in general. One of the reasons for this could be that the online course has less synchronous 'contact' time and therefore these issues need to be raised when this time is available. The smaller sizes of the live tutorial groups allow for more one-one-one interaction than may be present in the contact course, but it is important to note that the online course has far less 'contact' time to facilitate this.

Appendix 3: Managerial Finance contact lectures: field notes

Managerial Finance: Lecture 1

Mangerial Finance **[Lecture 1]**

Date: Monday 5 March 2018

Field Notes

Before lecture S1	Two students ask questions and he responds while prepping for the class – quite an informal chat. Takes a while to quiet students down, everyone collects papers at the front that he has put there. Calls out the same student again informally to carry on conversation – making hand gestures. Seems like quite a casual relationship – he calls the student by his name.
12h00 – 12h05 S2	He starts lecture with a re-cap (presumably from the previous class) Referring to the amount of work he has given them, he says he will make up for the tough week with fewer questions (presumably in the tasks) Refers to the objective test [link to evaluation] "You all know this definition" – referring back and linking to previous work. "I noticed some people were struggling to get it done." He says that they need to know a balance sheet well – seems to be hinting at assessment

12h05 – 12h10 S3	"Happy? Any questions?" before moving on from re-cap He says he loves Mondays because everyone is quiet – joking tone. A few students laugh. He tells them that he cannot move an upcoming workshop. Apologetic tone. Asks the class what the accrual basis is. Nobody answers so he answers the question himself. Asks what is going to happen with expenses. He waits for answers from the class. No answer. So he asks – "will they increase or decrease?" A few students answer from the audience in unison. He tells the class that they will not get that in the first test, but will get it in the second test and exam. [Link to evaluation]
12h10 – 12h15 S4	Refers to the handout given at the start of the class. He asks the class – "will the shares be valued more or less?" ; "Will the share price increase or decrease?" Continues referring to handout. When explaining how the salaries increase in the balance sheet he contextualises this – says that maybe the business got busier and hired more people. This context is not provided in the handout or slides. Contextualises the numbers in a more accessible way. Asks the audience - "What characteristic won't your balance sheet comply with?" A few answer in unison as it seems to be a one-word answer. He says "Pay attention" – and then explains that this section will be in the test and exam.
12h15 – 12h20 S5	Refers to handout – and shows it to the class (the actual page they are working on). Explains what they are expected to do next week. "Follow? Happy?" – pauses for response. Lists the possible things he can ask them in the exam [link to evaluation] "Happy?" – a few grumbles of agreement. He then asks one student by name if they are sure – this seems to be a rhetorical jokey question. Continues with content and asks the class how this ties in with a concept from last week in their tuts (linking back to previous work).

	Shows how the company financial year is broken down into periods and cycles. He tells the class it is similar to how they have birthdays every year – it breaks up the year, like a financial year. This seems to be a case of weakened classification between the theory and the everyday – to help students make the link.
12h20 – 12h25 S6	During his explanation he refers to a student by name – "this is all you need to know Mr. X". It is not a question and he does not wait for any response. This may be a strategy to keep students on their toes. "I know rent is paid in advance but here we work with arrears" [Weakened classification – referring to the real world, not just this accounting scenario. Helps students contextualise.] A student asks a question. I am not sure if the student put up his hand, but he just starts talking without a response from the lecturer. There doesn't seem to be any rule for students to wait for permission to speak in class. There are a few informal exchanges back and forth between him and the lecturer. In an effort to further explain the answer, the lecturer brings down the board and starts drawing the balance sheet in chalk and filling in the numbers [this is the first time he has used the board in this session]. Now he is asking the student (and the broader class), questions based on this original question.
12h25 – 12h30 S7	"Now to comply with this principle you have to do what?" – addresses the question to the class Continues explaining on the board with chalk. Student has his hand up but the lecturer continues explaining for a few minutes. Then he goes back and says "You had a question, X." Refers to the student by name. Then another student question. Yet another student jumps on this question asking for further clarity. There are quite a few clarity questions coming through. "Questions? Happy?" "Mr X you look a bit worried. Don't worry we will sort you out." He is referring to one of the students he spoke to earlier that he knows by name. Playful, jokey tone. This seems rhetorical as he doesn't wait for an answer. "To which income account does it refer to?" Waits for response from class. Another question. More explaining on board using the balance sheet set up. Students continue asking for clarity.
12h30 – 12h35	He continues to explain. "Which journal would it be recorded in? That would be a nice bonus question."

S8	Again he seems to provide another tip for upcoming assessments. Another question from a student in front who he knows on a first name basis. Lecturer repeats the question to the class – " X just asked this…" When the class doesn't answer he starts to explain. Another question from a different student. Repeats a list of 1000s. "Shall I continue?" Bit of a sarcastic tone because this is a pattern and every input will be 1000. "Happy?" A student asks what a scenario in a test or assignment would look like. Then he starts explaining a scenario and how it would look. [Link to evaluation] Then he explains another scenario. There are a few groans from the class – they sound a bit overwhelmed by the complexity of the scenario. He says "No, I'm just joking." A few laughs from the class.
12h35 – 12h40 S9	He continues explaining a potential scenario for an assessment. "I will tell you the rent is 11 000, but only received for 11 months." "But you need to read the question carefully…because it could be like that…you would figure out monthly rental expense like this." [Link to evaluation – quite explicit.]. "Makes sense?" He then says that the information will be there (in the assignment question). He says that he doesn't use long stories (in the assignment questions), but rather likes to keep it brief. Then gives another example of a scenario. "Can we move on?" Another question from back. He answers. "Happy? Can we continue?" He makes a joke about how he gave them so much work this weekend. He continues explaining expenses. He says that nowadays everything is prepaid and he even refers to his own electricity meter. He then says with day zero we now use less water so water expense may be lower. There is weakened classification here between the theory and the everyday. Referring to current events and practices that they would identify with. "Shall I do it again?" Starts explaining but there seem to be many nods so he stops explaining. "You guys get it? You with me?"

	Then he says to the class that those living with their parents or who don't own their own place must look at the utility bills. He says you are paying about R120 for refuse collection." He explains that these are always paid in arrears (this is how he explains this theoretical concept to them). Again this is weakened classification. He is bringing in the everyday to contextualise the equations.
12h40 – 12h45 S10	"Can I leave this? It was just for illustrative purposes. Happy?" Refers again to the question at the back – "Happy?" Now he moves on to the slide with the 'lecture example'. He says that in the test the scenario will not be this long. He will make it shorter than this by putting a lot of the expenses under one broad heading of 'operating expenses'. [Link to evaluation]. Another student calls out another question, referring to the lecturer by his first name. It is the same student who asked a question earlier. Again, quite an informal exchange. As he is about to continue with his lecture example he sees the time – "Is my time up? I was having so much fun." He smiles. Then the class starts packing up and leaving. There is no formal dismissal. As they leave he reminds everyone to take the handouts he put out at the beginning of the class.
After lecture S11	He stays for about 20 minutes after the class answering questions from about 10 different students. Some in groups, some individual. He chats to them all quite informally. One student (the one who referred to him by his first name earlier), asks him to explain something on the board which he does. He reminds her to look at the lecture example. Again she refers to him by his first name. They have a very informal exchange and she speaks to him in a very casual tone, sometimes making jokey or sarcastic remarks. Their voices become a bit raised and almost argumentative, but not aggressive as they are smiling. He chats to another group of three students informally about the group project. At one point he refers to his wife, then he refers to something that happened in the news – the fall of the share price of Tiger Brands due to the listeriosis crisis. He then discusses some other general share trading tips that seem to be relevant to the project, but also a matter of personal interest for him and the students. When they say they don't know which shares to trade he says they should use a women's intuition and he refers to an article he read about women being better at trading. Here there seems to be a weakened classification – between the theory and the everyday. Students ask questions about the project. "So you're basically looking more for the 'why'?" He says yes. He tells them they have to follow Business Day and the Times. Again, clear link to evaluation. Explaining the evaluative criteria.

	Another student asks about an assessment. He says that he will probably delay the deadline but he will chat to them on Wednesday.

(S12) Informal chat with lecturer after the class:

He says he has changed the class in recent years to reduce the workload as the programme is very intense, and students were struggling with many deadlines. Another change he has made is to provide the students with handouts so that they don't need to waste time creating their own balance sheets, etc. during the class. They can just make notes on the handout.

He immediately discusses the flaws of the online course (he has been somewhat involved in the development and presentation of it as the course convener). He says that he did appeal to the programme manager of the online programme for the inclusion of more contact time (such as workshops on a Saturday). He emphasizes the importance of students having contact time with lecturers and tutors and the ability to ask questions as they go through the content. He seems to feel this is an important aspect of the course and the reason why the online course has not performed well.

He also says that the online students don't get the handouts that he gives in class which he feels also disadvantages them.

Note: It is likely that all course materials would have been redesigned into online learning materials so I am not sure if this is the case (that they were actually missing content), unless it wasn't handed over properly.

<u>Recurring themes during observation and reflections on framing and classification:</u>

Evaluative Criteria:

The lecturer constantly refers to evaluative criteria throughout the lesson. There are many instances in which he refers to tests, assignments, and the exam, and what content they would include and how they would be assessed, as he goes through each topic.

Pace:

A large portion of the lesson is spent on answering student questions. The lesson ends quite abruptly before the lecturer can start on the lecture example he planned to cover. This indicates that framing could be quite weak, with students being able to set the pace to some extent. He also pauses often for questions and to ensure everyone is following, which allows students the opportunity to set the pace.

At the end of the class he does mention to one student that he will probably move out one of the assessment deadlines, suggesting there is weakened pacing here too.

Hierarchical Rules:

Overall, the lecturer seems to have quite an informal relationship with his students. This is based on a few observations. Students come to him and ask questions before and after the lecture, and he stayed for about 20 minutes after the lecture to answer these questions. He knows many of the students by name and will often refer to them by name when answering their questions. Sometimes he will call out a student by name during the lecture in a jokey way – e.g. "Mr X you look a bit worried. Don't worry we will sort you out." This could also be a strategy to keep students on their toes and paying attention to the class.

One of the students refers to him by his first name. There does not seem to be a formal process for students to ask questions in class, and there was also not a formal dismissal at the end of the class.

Sequence:

Nothing is really standing out here yet. It seems that there is a defined sequence in the course. He refers to previous sections and this week is dedicated to the adjustments section. I still need to access the course outline to see how the course is sequenced.

Selection:

Also nothing really standing out. The content, scenarios, and examples are chosen by the lecturer for the most part. There is not much of a push from students to cover other topics. Most of their questions are seeking clarity on the topics being covered already.

Classification:

There are a few instances of weakened classification between the theory and the everyday. The lecturer will often contextualise the content with reference to the everyday. This weakened classification seems to be used mainly to assist students in understanding the content. To explain the concept of paying in arrears, for example, he says to the class that he knows that rent is paid in advance in the real world, but here they work on the assumption of paying in arrears. He also contextualises the utility bills by referring to the current day zero issue in Cape Town and how this could lead to businesses using less water.

The scenarios he works with in the lecture are fictional, but they are based on real world situations (the use of a fictional business with fictional expenses and income). It is important to remember that the subject itself does require reference to real world scenarios – this is the nature of the discipline. It is a subject which prepares students to work with real financial documents in the business world so there is

a need to present the scenarios in this realistic way. The content is therefore not likely to ever be completely abstract – like it would be in a subject such as mathematics, for example.

Another general observation I made is that when he addresses questions to the class he often presents these as questions with two possible answers – e.g. increase/decrease ; more/less. This may be a strategy he uses to keep students engaged throughout the class. For the most part a number of students shout out the answer together, rather than one person raising their hand and answering it. This allows everyone to participate. It also allows him to gauge whether students are following.

There are three sources of pedagogic material he uses throughout the class – handouts, lecture slides, and the board (which he writes on in chalk). It will be interesting to compare this use of multiple materials at one time with the online class.

Managerial Finance: Lecture 2

Mangerial Finance **[Lecture 2]**

Date: Wednesday 7 March 2018

Field Notes

Before lecture S1	He is at the front with a few students, chatting, and smiling. Starts drawing the outline of the balance sheet on the board with chalk. Brings up the lecture slide. Initiates a chat with a student at the front of the class – seems informal, not about the coursework.
12h00 – 12h05 S2	Starts the class with a re-cap. “Let’s see what you learnt on Monday.” “Let’s see your retention and ability to apply.” Asks the class why it is necessary to prepare end of year adjustments. Nobody answers. “See you don’t listen. What are you doing here?” Jokey tone.

	Calls out a student by name. He then starts discussing a current news event – the share price drop that Steinhoff has experienced. He links it to the theory they are covering. [Weakened classification]. He starts on the lecture example they didn't get to in the last class. He says this time he wants to go through the content faster.
12h05 – 12h10 S3	Writes on the board while referring to the handout. A few students call out and there are confused grumbles from the class – "Where are we?" They are not sure what part of the handout he is referring to. He shows them. He then explains how departments at the university are charged for exam booklets and other stationery. He seems to be linking this to the stationery expense in the course work, but the meaning of the link is not entirely clear. [Weakened classification]. Then goes on and refers to the basic principles of debiting and crediting an account.
12h10 – 12h15 S4	In the middle of his sentence he says "right Mr X" (referring to a student). Again he does not pause for a response. He does this again when discussing a question. Refers to handout while writing on the board. "Ms X are you happy?" (referring to a student). She says yes. A student calls out a question and there is an exchange back and forth between him and the lecturer. "You get marks for the journal entry and for the calculation. Sometimes you get more marks for the journal entry." [Link to evaluative criteria.] "I'm not going to help you so much anymore. You should have looked at it on the bus." [probably referring to looking at the handout while on the Jammie bus]. He then refers to a student question from the previous class (she asked what a scenario would look like in a test or exam). He then explains what this scenario would look like. He explains how a student should answer it – "That's 4 marks."
12h15 – 12h20 S5	Continues filling in balance sheet on board. Tells the class to go to page 4 on the handout and asks what the figure is there. Then refers to the next page. "Am I going too fast or slow enough?" "What amount would you put there?" A number of students answer in unison.

	"Happy?" He tells them they need to struggle through question 6 for next week. Goes through the slide. As he is explaining he again refers to a student by name in the middle of a sentence.
12h20 – 12h25 S6	"Happy?" Again he refers to another student by name. He is now discussing expenses again. "What else do you need in an office environment?" He gives the example of cleaning materials and said this is the same concept as stationery (this seems to be a tip for assessment). "Your Jik, your Pledge…" refers to real products. [Weakened classification]. "Happy?" "Remember that big corporations spend a lot on stationery." He says now they are able to balance the account. "You do it for me. You should be able to do this now." Fills the balance sheet out on the board with some interaction from students. "You don't need to know this but I'll put it down." [Link to evaluative criteria]. "What's the balance?" Waits for students to answer. He then asks a question and refers to "those who have done accounts." He seems to be referring to students who have done accounting in school or previously at university, and seems to imply that they would have more knowledge on this than the others.
12h25 – 12h30 S7	"It's the same concept. Learn from this basic entry." He is showing them how a particular concept works in a simple example, so that they could apply it to more complex examples. "All income and all expenses get treated this way." "Let's move on to depreciation." [Link to sequence]. Goes through the formal definition on the slide. He then explains it in a more simplified way. Does the same for the concept of residual value. Also including a practical example on the board. Asks them what people do when they sell their cars.

	"Make it pretty, isn't it so?" He talks about how people will cover up scratches, buy new tyres, etc. He uses this to explain the extra costs associated with disposing of an asset. [Weakened classification]. Referring to something else he says, "I don't expect you to know this." [Link to evaluative criteria]. "Makes sense? Correct?"
12h30 – 12h35 S8	Poses a question to the class with two answer options – "better or worse". Referring to something else he says, "In real accounting they would change it every year. That's why I don't like students to know this." Seems to imply that what they are doing in class is not "real accounting". A question from a student and a bit of back and forth. When explaining an example he refers to how this occurs in companies and even at this university. [Weakened classification]. The last definition on the slide. Gives the formal definition and then a practical example. "Some of you drive cars here." Explains how if you don't drive the car it will get rust and other issues. He says that he likes old cars personally because they don't cost you an arm and a leg. [Weakened classification]
12h35 – 12h40 S9	Goes through the slide and also writes on board. Goes through a calculation on the board. Asks the class a question. When nobody answers he writes it on the board and then asks again. A few confused looks from the students. Goes through a few more examples and students start answering. "Oh we getting smarter now?" Jokey tone. "Happy?" Question from student. Gives another practical example from the university. Someone asks a question about this university example. He says it is a good question and starts explaining.
12h40 – 12h45 S10	He refers to a student he had last year by name. Someone calls out a question and he answers, then goes back to the lecture example on the slide. "I'm going to trick you in the first test."

	Talking about a bonus question. Says they will get a mark for getting it right, but he will subtract a mark if they get it wrong. Says this in a jokey tone. Continues going through the example and someone shouts out something. “I’ve noticed through the years, when a lecturer makes a mistake everyone is on it like hawks.” He says this in a jokey tone and students laugh. “You don’t need a calculator for that X.” Refers to a student by name. “You gotta practise it. It’s not difficult.” He says that in the last few years students have been disappointing in how they handle this type of question. Poses a question to the class. Nobody answers and he singles out a student at the back of the class. He does not refer to him by name but starts describing his clothing so as to identify him. “Take a chance. You can’t hide behind your Apple laptop.” Students start packing up as it is 12h45. A student in the front asks a question and students continue packing up while he answers it. “Tomorrow we will do…” “Thank you.” Again, no formal dismissal.
After lecture S11	As students leave the class he turns back to the student at the front of the class with a question and continues explaining. More students come up to ask him questions. At one point there are about 7 students around him.

<u>Recurring themes during observation and reflections on framing and classification:</u>

Evaluative Criteria:

Again, the lecturer is quite open about the evaluative criteria for upcoming assessments. He makes reference to how questions would be asked, and how they should be answered.

Sequence:

There is one point at which he makes a clear transition to a new section on depreciation. He does this by saying to the class that they are moving on to depreciation, and changing the slide to the definition of depreciation.

Pace:

The framing over pacing is a bit stronger in this class than it was in the previous class. He does say at the beginning of the class that he wants to move through the content faster this time. A few times he implies to the class that they should be covering the content in their own time so that they can go through the content more speedily in class. E.g. "I'm not going to help you so much anymore. You should have looked at it on the bus."

He is still as open to student questions during the lesson, however, and he does pause often to check that everyone is following. At one point he asks if he is going fast or slow enough.

Selection:

As in the last class the lecturer exerts most control over selection. Even the practical, real world examples are his.

Hierarchical Rules:

Again, the relationship is quite casual and informal. He refers to students by name often, and makes jokes during the class. Students come to him before and after the class.

Classification:

As in the last class, there are a few instances of weakened classification where there are references to practical, real world examples – many that are relevant to them as students, or relevant to the university environment they are familiar with.

I would be interested to see if this weakened classification is simply a pedagogic strategy used in the lectures to help students grasp the concepts, and if the expectation in the assessments is that responses are strongly classified. Will students be able to identify this shift?

Another interesting observation was his reference to students who have done accounting previously, and the expectation that they would have more knowledge on certain topics than the other students. Could this be problematic and lead some students to feeling excluded or at a disadvantage from the outset?

Also, the reference to "real accounting", and the resulting implication that what they are doing is not real accounting is interesting.

Managerial Finance: Lecture 3

Mangerial Finance **[Lecture 3]**

Date: Thursday 8 March 2018

Field Notes

Before lecture S1	Joking with a few students at the front of the class. Tells the class they need to nominate a class rep tomorrow – lists the names of students who have done it in the past. Speaks about an upcoming workshop - "in a more relaxed environment you learn better" He explains that this is why he likes workshops.
12h00 – 12h05 S2	Starts a re-cap of the previous class. "Tell me what you know about depreciation and non-current assets". He says that he likes these types of broad questions. He says that he did a sociology undergrad degree and would love for students to just write about what they know about the topic (more open-ended, essay format). He says, however, that they are constrained by UCT convention so this is not possible. [This seems to be quite an important indication to students about evaluative criteria and what is expected of them.] Refers to a student by name and makes a joke. "Do assets always appreciate?" Addresses this question to the class and a few students call out. A student raises hand and asks question. He answers. "Makes sense? Right?" When discussing depreciation he makes the practical example of the student owning their own car. He says that he still has a desk he bought in 1983. He has treated it well and thinks he could get more for it than what he bought it for (practical link to depreciation).
12h05 – 12h10 S3	Student calls out question and he starts explaining answer on the board. He goes to the next slide on depreciation with its definition and so on. He says that this is what he wanted them to say and that this would be 5 marks (presumably in an assessment context). "I would have given Ms X one mark." Refers to a student by name who made an attempt to answer this question before.

	"You will always be given the method and rate." (again this seems to refer to an assessment context)
12h10 – 12h15 S4	He is filling out the balance sheet on the board. He tells the students to write a note next to the dividends section indicating that it is not an operating expense. "Don't tell the others who are not here" – jokey tone "I always ask that for 2 marks." – [link to evaluation] "I'm only going to do one. You can do the others." – he says this while writing out an example on the board and referring to a lecture slide. "Makes sense?" A student asks a question and there is some back and forth. "What we are doing here is accounting depreciation, what SARS gives you is tax depreciation." (reference to real world application) Again, is he implying that this is not "real" accounting? "What do we write in here?" Students call out as he fills in the balance sheet on the board.
12h15 – 12h20 S5	"Let's do the next one. Quickly." [Link to pace]. "These methods are all the same. Make a note somewhere." Refers to a student by name, does not wait for response. Poses a question to the class. "Look out for that in the first test, or next week in your objective test." [Link to evaluative criteria.] "Correct?" Poses another question to the class and some students call out. "You have to look at the date." Says that they will get that in a test or exam. Continues doing the balance sheet on the board. "You can score marks for free there."
12h20 – 12h25 S6	Poses question to class and a number of students answer in unison. "Now I can go a little bit faster." [Link to pace]. "That's my culture, by nature we talk fast." [Link to pace and hierarchical rules]. "I could throw this in." [Another tip for assessment.]

	Poses a question to class. “Do you make a profit or a loss?” [Two answer options]. Continues filling in balance sheet on board. “Right? Correct?” “Just pay attention.” Asks a question to the class. Nobody answers so he answers himself. Asks another question to class. “Come on Ms X.” – refers to a student by name.
12h25 – 12h30 S7	One of the students picks up an error in the handout. He acknowledges it. It is an extra 0 in one of the numbers. “In accounting we love zeros.” Does calculation on board while asking class questions. “Mr X will tell you how I calculated 2550” – refers to student by name. “Happy?” “Something for you to think at home.” “The kids in grade 3 learn that.” (referring to addition) “We normally give you this number. It’s not so much about the number, it’s about the calculation.” [Link to evaluative criteria]. “Let’s go on to the next adjustment.” He says that next week they will do a lot of theory with another lecturer. “You will enjoy that, he will spoil you.” As he goes through an example he calls out another student by name. He then discusses how Edgars used to allows customers to buy things 6 months interest free. [Weakened classification].
12h30 – 12h35 S8	“That’s what you are going to learn.” (referring to an upcoming section). He asks them what they do when a debtor doesn’t pay. He says after you have called the lawyers, sent the mafia and so on. Jokey tone and some students laugh. Student asks a question and he answers. He speaks about how bad debts work with retailers in the real world. Explains the benefits to credit sales even when there are bad debts. “It was on Facebook the other day.” He also mentions loan sharking and says that it happens here on campus too. Someone asks where. He laughs but doesn’t answer. [Weakened classification]. “Are we happy?”

12h35 – 12h40 S9	He goes back to his previous example. He says now that they have done everything to try and get the debtor to pay, like calling the lawyers, they can decide to write it off as bad debt. [Provides context to these figures through these explanations]. He then tells the class that he wonders if we have a moral obligation to explain to people what buying on credit means. He asks how retailers can rip people off like that. He says that in South Africa there is poor financial literacy. That people don't manage money properly. If it was up to him, he wouldn't let pensioners buy things on credit as they are unable to pay it back, and then they get into even more debt. "Anyway that's enough." This has been a bit of a tangent about general issues in the country, but not really related to the calculations. Continues doing the balance sheet on the board. He says that they could continue forever talking about morals, ethics, etc. "Let's move on." "I'm not going to balance it." He asks the class to balance it themselves. He says they might get that in the test. Tells them that he has shown them how to do it in the past. [Link to evaluative criteria]. He tells them that Mr. X (referring to a student name) is not here today so he can't pick on him. Referring to the students that are not in class today he says that they must be starting to feel the pressure, especially with tests coming up. Jokey tone.
12h40 – 12h45 S10	A student asks if they need to worry about this section in the test and the lecturer says not to worry about it. Another student asks a question and he refers to her by name. He sounds slightly exasperated as she is getting it wrong. "Why do I have to say this over?" Goes through the process again. Refers to something that would appear in the objective test. Another student question which he answers. "Makes sense?" Another student question. He answers it as students start packing up. Refers to the student by name. As students leave he says "Tomorrow we do…" Then he goes back to the student question. Again, no formal dismissal.

After lecture S11	A number of students come after class to ask questions and he stays for over 10 minutes. He is answering their questions using the board.

Recurring themes during observation and reflections on framing and classification:

Classification:

There are a number of examples of weakened classification during this class. The lecturer often uses practical, real world examples to help students grasp concepts. To explain depreciation the student refers to a car students may own and how this would depreciate over time. He also explains the concept of bad debts and how it works with retailers.

At one point he says, "What we are doing here is accounting depreciation, what SARS gives you is tax depreciation." This could be another reference to 'real' accounting and the fact that what they are covering in class may not be 'real' accounting.

The discussion on the moral considerations of giving credit and financial literacy is a bit of a departure from the course work. This could even be perceived by some students as a sensitive or controversial subject given how many lower income and non-English speaking people have been taken advantage of by retailers who provide complex and confusing credit terms.

Pace:

It seems to be the lecturer's belief that a more relaxed environment is conducive to greater learning. While he doesn't specify what he means by 'relaxed', this could refer to the pace of learning. The workshops he refers to are 2 hours long rather than the 45 minute length of the lecture and are less structured than the lectures.

In this lecture he tries to pick up the pace a bit. There are a few times when he refers to his desire to go through the work a bit faster. He also asks them to do their own balances or calculations at times rather than him going through every example – another strategy to speed up content coverage. As always, however, there are many student questions throughout the lesson, which affect the pace of the class, and he still allows all these questions.. He does also stop often to ask the class if they are happy before moving on.

Evaluative Criteria:

The lecturer makes an interesting comment at the beginning of the lecture about how he would like to ask them open-ended, essay-type questions where they could discuss what they know about the subject, but they are constrained by UCT convention. This is an important indication to students about the nature of the subject, and also what the acceptable types of assessment are in this subject. The comparison to sociology is also quite telling. Those familiar with the subject will then be able to understand Finance in contrast to Sociology.

I wonder if this comment by the lecturer could create a negative perception of the course in the minds of students. By using a term like 'constrained', the lecturer is creating an unfavourable picture of evaluation in the course. He also says that they will enjoy the classes next week as they will contain a lot of theory. This also reinforces a negative view of calculations.

As in previous lectures, the lecturer is quite open and transparent about the evaluative criteria. He goes through the actual mark allocations. E.g. "I always ask that for 2 marks." He also shows them a definition on the slide that he says would be worth 5 marks.

There are a number of points at which he says that a certain type of calculation should be expected in the test, or in an objective test. E.g. "Look out for that in the first test, or next week in your objective test."

He also discusses which content will not be examined. When a student asks him if a certain section is relevant for the test he says no.

Selection:

As mentioned in the section above, the lecturer's comment comparing Finance to Sociology and his desire to ask questions in a more open-ended, essay-type manner is quite interesting. It also indicated something important about selection. A more open-ended approach where students just write what they know about a topic implies that students have more control and freedom in terms of selection, bringing in content they choose. The 'constrained' approach he refers to implies that students are quite limited in terms of what they can select to include in their assessments.

Hierarchical Rules:

As observed in the previous lectures, the lecturer seems to have quite a casual and relaxed relationship with his students. He knows many of them by name and often refers to them by name during the class, even if it is simply to keep them on their toes and paying attention.

He often jokes with his students and is always available before and after class to answer questions.

As mentioned previously, he believes that a more relaxed environment is conducive to learning (referring to the environment in the workshop). Again, he has not stated what he means by 'relaxed', but this could refer to a more informal environment than the lecture environment, which has its own ways of creating a hierarchy among students and teachers.

Managerial Finance: Lecture 4

Mangerial Finance **[Lecture 4]**

Date: Friday 9 March 2018

Field Notes

Before lecture (This section takes the first 11 minutes of the lecture time)	As the lecturer is about to start a student puts up his hand to ask a question. He says that as there is no class representative yet he wants to address an issue. He asks that the lectures are recorded as many of the students are not from an accounting background and the content is going very quickly. The lecturer says he is going as slowly as possible and the workshops will also be helpful with understanding content. He adds that not recording the lectures is a departmental decision as when lectures were recorded they noticed that attendance dropped significantly. The lecturer says that another issue is that students think that finance is a subject they can learn in parrot fashion, whereas it is actually a new 'language' they need to learn.
S1	There is a bit of an argument back and forth between the students and the lecturer that gets quite heated. Some of the students feel that he is not understanding their concern. He thinks they won't attend lectures but they don't feel it is fair for them to not get the recordings if other students choose not to come to lectures. The lecturer starts relenting a bit but he says he will also need to get the other lecturers' approval (that work on the course). He also says his door is always open and students never come to ask him questions. Another student asks that if the lectures are not recorded could the workshops then be recorded. She says that some students cannot attend, not because they do not want to, but because transport is an issue (the workshops take place in the evenings). He says that he will also find out if this is possible. He is aware that transport has been an issue for a number of years. He has asked the university to organise transport after tests and other evening activities but this has never happened. He says that he does not like using lecture slides, Vula, and laptops because he thinks it makes people lazy. He enjoys writing on the board rather. Another student asks if they can put the slides up before the lectures. He says then students won't do the readings in advance. A few students laugh.

12h00 – 12h05	[redacted]
12h05 – 12h10	
12h10 – 12h15 S2	Writes on board. Refers to a student by name. Mentions that this is something extra that is not in their notes. A student asks if he can explain insolvency and he explains it.
12h15 – 12h20 S3	Poses a question to the class – what happens to the balance of a particular sheet. Someone calls out 'bad debt'. He shows them a different way of recording the transaction. He says that they will still get 100% if they record it the other way [link to evaluative criteria]. Asks the class, "What is an accrued expense?" Doesn't really leave much time for anyone to answer. Starts explaining it himself. Refers to an example on the handout to explain it.
12h20 – 12h25 S4	Continues filling out the balance sheet on the board. Calls out a student by name in the middle of an explanation, but does not require a response. Referring to the handout he asks the class what the amount is. When it comes to accrued expenses he explains that there are three different things you could call it. He prefers 'accrued expenses', but an American textbook may call it 'payable'. Student calls out question and he answers it, referring to her by name. He says that he does not mind which name they use for 'accrued expenses', it is only the classification as a 'current liability' that is important. He says that he has marked other names correct. [link to evaluative criteria]

12h25 – 12h30 S5	A student calls out, referring to an error in the handout. He acknowledges that it is an error. Balances a total on the board. He says that the same concept can be applied to other expenses, not just telephone expenses. He uses the example of advertising being another expense. He mentions that he is trying to teach them about the principles. “Happy?” Goes on to a new slide and starts explaining accrued income.
12h30 – 12h35 S6	He explains the concept of debtors through practical examples. He says that if, as a student, you owe the university money, then you are a debtor. If you owe money on a Woolworths account, then you are a debtor of Woolworths. [weakened classification]. Continues explaining with reference to the handout. Refers to a student by name – again no response needed. Poses a question to the class and a number of students answer in unison. He says that these are basics from Week 1 (seems to imply that everyone should know them). Asks the class for a figure from the handout. A few call out. Poses a question to the class. A few answer. Shows them a calculation on the slide. Tell them that this is how they should be thinking in a test as this is what is required. Explains the ways that he could change this type of question in a test - “I can play around with that” [link to evaluative criteria].
12h35 – 12h40 S7	Shows the class a calculation on the slide. He says that he prefers the long method of doing this type of calculation. He explains the steps of the calculation that you would get marks for in the test. [link to evaluative criteria]. There is a student question and he answers it by referring to the slide. “Happy?” Refers to a student by name. Going through another example he says that he could bring this in for the test. He explains how he would do so. [link to evaluative criteria]. He tells the class that it is important for them to know this kind of language if they go to the bank, for example. [weakened classification – showing the relevance of the content in practical, real world examples]. Continues going through the balance sheet on the board.

	Asks class for a total. A few call out. “There’s your post adjustment trial balance.” He says that this is what they need to know. Referring to another section he says that they have not done it here so he will not examine it, although it may come up in the tutorials. Shows them the completed sheet on the slide. He gives them a task for Monday. When there are a few groans from the class he says that fear will hold them back.
12h40 – 12h45 S8	He tells the class that he once tried to balance a balance sheet for 3 hours but couldn’t figure it out. He took it home and his son solved it in a few minutes by identifying the error. He tells the class that they can still get 18/20 for a balance sheet that doesn’t balance in the test. A student asks him what marks are given for the different components of a balance sheet. He explains, and mentions that a mark is also given for presentation – i.e. putting the sheet in the correct format. A student calls out a question, which he answers, referring to the student by name. Refers to handout and starts writing on the board. Poses question to the class and a few mumble an answer. Referring to some of the work they did previously, he explains that this is why he introduced it to them last week (implying that the previous work equipped them for what they have been doing this week). [Link to sequence]. Refers to a task on the slide and asks them to try this on their own. Some students start packing up and he shouts out, “not yet.” Continues going through slide. “Correct?” “Do it.” – referring to the calculation they have been asked to try on their own. He says that he might put the solution up on Vula.
After lecture S9	About 10 students come up to him after the lecture to ask questions. He stays on for about 15 minutes. One group of students ask if they can change the number of members they have in their group project (to below the required number). He says that’s fine. Seems quite relaxed on that. [evaluative criteria].

(S10) Informal chat with lecturer after the class:

The pace of the classes is clearly a concern for some students, with some expressing that they feel the content is being covered too quickly. The lecturer seems quite exasperated by this point. He tells me that he is going as slowly as he can, and they have even cut down on the amount of course content in recent years. In spite of these efforts, he states that some students are not even understanding the basics of the subject. He says that he cannot help it if people are not doing their work. This implies that his perspective is that students are at least in some way accountable for their own struggles with the work.

He also states that language is an obstacle, as some students are not first language English speakers. He refers to one of the students who did not understand a common turn of phrase due to language barriers.

Explaining why he does not want to record lectures, he again refers to the attendance issue. He says that when they have recorded lectures in the past, attendance dropped dramatically, with some classes seeing an attendance of fewer than 10 students.

When discussing marking of tests and assignments he says that there are often quite significant discrepancies in marks allocated between different tutors/markers. He does some moderation himself but he says that he obviously cannot look at every paper. He says that sometimes he will pick up 4 or 5 extra marks. Once he picked up a discrepancy of 20 marks. I find this quite surprising as the nature of the course implies that there is only one right answer (therefore it should be quite straightforward to mark). When I look at the test and marking rubric I will need to interrogate this issue and see how marking discrepancies could occur. Are they simply counting and totalling errors? Or is there some ambiguity in the marking rubrics themselves?

Recurring themes during observation and reflections on framing and classification:

Classification:

Again, the lecturer uses weakened classification by drawing on practical examples to help students grasp the various concepts. To explain the concept of debtors, for example, the lecturer uses the example of the students owing the university money and therefore being a debtor to the university. These are examples students could relate to personally.

Sequence:

While there is not much in the way of sequence to observe in this lecture, there is one point at which he gives students some insight into the sequence of the course. Referring to a previous section, he tells the class that this is why they covered that previous section first, in order to equip them for this week's work.

The lecturer controls the sequence of the lectures for the most part, with the support of the lecture slides in transitioning from one section to the next.

Pace:

It seems that some students are struggling with the pace of the lectures, hence the request for the lectures to be recorded and uploaded on Vula.

The lecturer is very resistant to this idea, in part because he feels that it will affect attendance. He feels that he is going through the content very slowly, but clearly this view is not shared by everyone in the class.

It seems that he feels comfortable having more control over the pacing of the course. Recording the lectures and putting them on Vula would mean that students would have more control over the pace at which they go through the course content (as well as the sequence to some extent). He seems to be quite resistant to this idea. He also makes his general dislike for technology quite clear in the lectures too.

Evaluative Criteria:

As in previous lectures, he is quite open and transparent regarding the evaluative criteria. Again, he shows how marks will be allocated – e.g. how marks will be allocated for certain steps in a calculation.

During the debate at the beginning of the class regarding lecture recordings he does mention that students should approach this course as if learning a new language, rather than trying to study the content in parrot fashion. This is an important indication to students about the nature of the subject and the expectations when it comes to assessment.

He shows quite clearly what is and isn't acceptable in terms of recording transactions and how marks will be allocated. He also explains which names (e.g. for accounts) are and aren't acceptable in assessments.

He does emphasize the importance of general principles rather than specific examples. When discussing the names of accounts, for example, he says it is more important to know the classification of the account rather than its name.

In order to assist students in preparing for the test and other assessments, he shows them how the examples they are going through could be altered in a test question – e.g. "I can play around with that". The example he goes through in the class for expenses is a telephone expense but he says that in a test this could be an advertising expense, or another type of expense. This focus on principles and methods rather than actual examples implicitly encourages students not to learn in parrot fashion but rather to learn how to do these types of calculations, so that they will be able to do them in the test, even if the details or questions are slightly different.

He does also mention the topics that won't be examined.

When students ask him if they can form a group for their group project with fewer members than required in the course outline, he is happy for them to do this.

Hierarchical Rules:

While he still maintains the casual and informal relationship with students that he has had in previous lectures, the discussion at the beginning of the lecture about the recording of lectures does create some tension between him and some of the students. While they are expressing their concern, he does assert his power as the lecturer to deny this request. While he does say he will look into it, it is clear that he is quite resistant to the idea, and it is also clear that he will ultimately have the power to make this decision.

In other aspects of the course he is far more laid back and relaxed, such as allowing students to determine their own group project numbers, even if these numbers do not fit in with the required allocations.

Appendix 4: Managerial Finance online module: observation notes

Managerial Finance: Module 3

Outline of Module:

This section of the course is presented in a two-week module, the third of the course. All module content is released at once, and is then available to students for the rest of the course.

The content is presented using a combination of different online learning methods, from videos, to notes, to infographics, web resources, and so on. Each module also has its own dedicated class discussion forum, which usually contains a mix of content-focussed discussion topics initiated by the facilitator, along with student questions on content and assessments. Any student has the ability to post a new thread to the forum whenever they wish. Participation in this class discussion is not compulsory, but is encouraged.

Below is the basic structure of the module. This module is divided into two units, and has 9 online learning activities (excluding the class discussion). Each learning activity is numbered, creating a suggested learning path for students. The module is bookended by two learning outcomes questionnaires. The student can rate their own competence in relation to the module learning outcomes before they begin the module, and after they complete it. This is a way for the student to monitor their own progress, and become familiar with the learning outcomes for the course. The relevant learning outcomes are also provided at the beginning of each learning activity.

Module 3	
Learning Outcomes Questionnaire	A non-graded questionnaire in which students can rate their own competence in relation to the module learning outcomes *before* the start of the module.
Unit 1	
3.1 Reading	Prescribed section of reading from a set of notes.
3.2 Web Resource	Link to an online video.
3.3 Infographic	Simplified visual and textual representation of content.

3.4 Reading	Prescribed section of reading from a textbook.
3.5 Practice Quiz	Non-graded multiple-choice practice questions.
Unit 2	
3.6 Reading	Prescribed section of reading from a set of notes.
3.7 Video	Lecture video from facilitator.
3.8 Reading	Prescribed section of reading from a textbook.
3.9 Video	Lecture video from facilitator.
Learning Outcomes Questionnaire	A non-graded questionnaire in which students can rate their own competence in relation to the module learning outcomes *after* the completion of the module.
Class Discussion	Asynchronous online discussion forum for students and facilitator.

Field Notes:

Module 3: Adjustments and Annual Financial Statements

Module Descriptor: Gain insight into the accrual basis of accounting, adjusting entries in the general journal and general ledger to aid in annual report preparations, and different methods of calculating depreciation.

Unit 1: The accrual basis of accounting and adjustments

Unit Descriptor: Discover the difference between the cash and accrual basis of accounting, and how to perform basic adjustments in the general journal and general ledger.

Suggested Unit Learning Time: +- 100 minutes

Component:	**3.1 Reading: Adjustments, prepayments and accruals**

Suggested Learning Time:	+- 20 minutes
Page 1	List of learning objectives for the set of notes. Examples of adjustments and their financial reporting classification.
Page 2	Definitions of income and expenses. Definition of the accrual basis of accounting and why it is more comprehensive and complete. Definition of end of period adjusting entries. This definition includes both the accounting terms used in actual balance sheets, as well as their everyday language equivalents. “obligations to pay cash in the future (liabilities)” “resources that represent cash to be received in the future (debtors)”
Page 3	Table showing how accrued income and expenses are classified in a balance sheet. Numbers are not used, only explanations.
Page 4	An example of an accounting entry is provided, however actual numbers are not included. A symbol is used to indicate where the numbers would go in the entry.
Page 5	Definition of prepaid expense and how it is recorded in an accounting entry. This explanation includes both the accounting terms used in actual balance sheets, as well as their everyday language equivalents. “Prepaid expenses is when the cash outflow (is paid) occurs before the recognition of the expense (that is before the service is used up).” “Are the costs of resources (assets) or services acquired by the firm before they are used to produce income (revenue).” Another example of an accounting entry is provided to demonstrate how prepaid expenses are recorded. Again, symbols are used in place of actual numbers.
Page 6	Definition of income received in advance and how it is recorded in an accounting entry. Another example of an accounting entry is provided to demonstrate how income received in advance is recorded. Again, symbols are used in place of actual numbers.
Page 7	Definition of accruals. Definition of accrued income and how it is recorded in an accounting entry. This definition includes both the accounting terms used in actual balance sheets, as well as their everyday language equivalents. Another example of an accounting entry is provided to demonstrate how accrued income is recorded. Again, symbols are used in place of actual numbers.
Page 8	Definition of accrued expenses and how it is recorded in an accounting entry. Another example of an accounting entry is provided to demonstrate how accrued expenses are recorded. Again, symbols are used in place of actual numbers.
Page 9	Definition of bad debts expense and how it is recorded in an accounting entry.

	Another example of an accounting entry is provided to demonstrate how bad debts expense is recorded. Again, symbols are used in place of actual numbers.
Page 10	Definition of allowance for doubtful debts and how it is recorded in an accounting entry. It does state at the top of the page, however, that this concept will not be covered in the course. Another example of an accounting entry is provided to demonstrate allowance for doubtful debts is recorded. Again, symbols are used in place of actual numbers.
Page 11	The step-by-step procedure for recording allowance for doubtful debts. A written formula for determining whether the allowance for doubtful debts should be increased or decreased.
Page 12	Two examples of accounting entries are provided – one for an increase in allowance for doubtful debts and one for a decrease in allowance for doubtful debts. Again, symbols are used in place of actual numbers.

Component:	**3.2 Web resource: Cash vs. Accrual basis of accounting**
Suggested Learning Time:	+- 5 minutes
This is a 5 minute long video clip from YouTube about the difference between keeping track of income and expenses using the cash basis of accounting and the accrual basis of accounting.	
00:00 – 01:00	A voice over narrator is used with stick men drawings on a white board. Uses a character called Jim who mows lawns. Shows a basic income statement for the income Jim has received mowing lawns using numbers.
01:00 – 02:00	Shows the basic calculations for Jim's income and expenses. Explains that this way of depicting income and expenses is known as the cash basis of accounting.
02:00 – 03:00	Introduces the concept of accrual basis accounting and explains what it is. Also explains the two rules of accrual basis accounting.
03:00 – 04:00	Jim's basic income statement is now redrawn using the accrual basis of accounting with the relevant figures. Once the income statement has been completed, the narrator emphasizes again that this is the accrual basis of accounting. The two incomes statements are then shown side-by-side and the narrator shows how the accrual basis income statement is more effective in reflecting the state of the business.
04:00 – 05:00	The narrator continues to explain the differences between the two income statements and two methods of accounting. Explains how the accrual basis is preferable for investors who are looking to make a decision about the business.

Component:	**3.3 Infographic: Prepaid and accrued expenses**
Suggested Learning Time:	+- 15 minutes
An infographic containing arrows and blocks of written text on prepaid and accrued expenses.	
Section 1	The infographic branches out into accruals on the left side, and prepayments on the right. On the left side there are two blocks – one explaining accrued income, and the other accrued expense. On the right side there are two blocks – one explaining income received in advance, and the other prepayment.
Section 2	This section covers prepayments and income received in advance. The infographic has expenses on the left, and income on the right. This section also contains two scenarios related to income and expenses. In some of the blocks there are questions, with different branches based on a yes or no answer. The different outcomes of the scenarios lead to different accounting entries, which are detailed in the text.
Section 3	This section covers accrued expenses and accrued income. Again, the infographic has expenses on the left, and income on the right. There are also scenarios once again, and questions, with different branches based on a yes or no answer. The different outcomes of the scenarios lead to different accounting entries, which are detailed in the text.

Component:	**3.4 Reading: Recording adjusting entries**
Suggested Learning Time:	+- 30 minutes
This is a reading from the textbook on recording adjusting entries.	

Component:	**3.5 Practice quiz: Accruals and adjustments**
Suggested Learning Time:	+- 30 minutes

A quiz consisting of 20 questions, testing students on the content from the unit. All questions are either multiple choice or true/false.	
Question 1	True/false question on theory from the module.
Question 2	Multiple choice question on theory from the module.
Question 3	True/false question on theory from the module.
Question 4	True/false question on theory from the module.
Question 5	Multiple choice question. Students are presented with an accounting scenario and have to choose the correct figure.
Question 6	Multiple choice question on theory from the module.
Question 7	True/false question on theory from the module.
Question 8	True/false question on theory from the module.
Question 9	Multiple choice question. Students are presented with a mock-up of an accounting entry and are asked a question based on this.
Question 10	True/false question on theory from the module.
Question 11	True/false question on theory from the module.
Question 12	Multiple choice question. Students are presented with a scenario and an accounting entry and are asked a question based on this. This question contains numbers.
Question 13	True/false question in which students are given a scenario and have to answer based on this.
Question 14	True/false question on theory from the module.
Question 15	Multiple choice question. Students are presented with a scenario and an accounting entry and are asked a question based on this. This question contains numbers.
Question 16	True/false question on theory from the module.
Question 17	True/false question on theory from the module.
Question 18	Multiple choice question. Students are presented with a scenario and an accounting entry and are asked a question based on this. This question contains numbers.
Question 19	True/false question on theory from the module.
Question 20	True/false question on theory from the module.

Unit 2: Accounting for tangible non current assets (fixed assets)

Unit Descriptor: Learn how to calculate depreciation using the straight-line and reducing-balance method.

Suggested Unit Learning Time: +- 85 minutes

Component:	**3.6 Reading: Accounting for tangible non-current assets**
Suggested Learning Time:	+- 45 minutes
Page 13	List of the major problems in accounting for tangible fixed assets. A diagram showing the process of valuing fixed assets at the date of acquisition. A table showing the various costs associated with the purchase of land or buildings (numbers are not included, only descriptions).
Page 14	Definition and explanation of the depreciation expense. This section includes both the accounting terms used in actual balance sheets, as well as their everyday language equivalents. List of the causes of depreciation.
Page 15	Methods of depreciation section. Definition of the straight-line method of depreciation. Mock-ups of the equations to calculate annual depreciation (using text and mathematical symbols, not numbers). Definition of residual value.
Page 16	Definition of the reducing balance method of depreciation. Equation for how to calculate this method of depreciation using text and mathematical symbols, not numbers. A mock-up of an accounting entry is provided to demonstrate how depreciation is recorded. Symbols are used in place of actual numbers.
Page 17	Definition of depreciation. A scenario is used to explain depreciation. Calculations (with numbers) are used to show depreciation over a period of time. The accounting entries for the depreciation are provided.
Page 18	Definition of the reducing balance method of depreciation. A scenario is used to explain this method of depreciation. Calculations (with numbers) are used to show the depreciation over a period of time. The accounting entries for the depreciation are provided.
Page 19	Example of an asset register – an empty template.

Component:	**3.7 Video: Understanding depreciation**
Suggested Learning Time:	+- 10 minutes
A lecture video from the facilitator of the course, addressing the topic of depreciation. The style of the video is talking head with text and graphic overlays.	
00:00 – 01:00	facilitator says that all businesses will have assets, and goes through examples of these. As she speaks, images of these types of assets appear on screen. She explains the concept of depreciation – text summarising these points appears on screen.
01:00 – 02:00	She introduces two methods of depreciation. As she explains what these are, text summarising these concepts appear on screen. She starts introducing the first method through a practical example/scenario of a business' asset using numbers. An image of the asset appears on screen. Explains the method through the example. Starts explaining residual value, again draws on the same example. Image and text appear on screen as she speaks.
02:00 – 03:00	Explains concept of depreciable amount. Again draws on the same example to explain this concept. Text appears as she speaks, summarising her main points. Expands the same scenario to explain additional concepts.
03:00 – 04:00	Explains a calculation that can be used to calculate depreciation – uses the scenario to give a practical example of this calculation. The calculation also appears on the screen in text and numbers as she speaks. She explains the different ways in which depreciation can be asked (this seems to be a tip for assessment). "If you get a question like that…" Explains a calculation and it is shown in text on the screen as she speaks. Goes through how to work out depreciation for the given scenario. As she speaks, the calculation appears in text and numbers on the screen.
04:00 – 05:00	Refers to the accounting entry and how it would be recorded. However, the entry does not appear on screen, she is just explaining it verbally. Explains what accumulated depreciation is – as she explains text appears on the screen to summarise this concept. She does say that it appears on the balance sheet, but no example of the balance sheet is provided on screen. She now clearly moves on to the next method of depreciation [link to sequence]. Starts explaining the reducing balance method of depreciation. Explains what it is in basic everyday language.
05:00 – 06:00	She then refers back to the original scenario and shows how this second method would apply here. A graphic is used to show the reducing balance over time. She emphasizes the importance of ignoring residual value and focusing on original cost in this method. This point is also summarised in text on screen. Goes through a comparison of the two methods of depreciation. The key points appear as text on screen.
06:00 – 07:00	Explains that in this method of depreciation certain figures will be provided (seems to be referring to assessment).

	She then goes through an example using a given figure, using the scenario that has been used throughout the video. Emphasizes the importance of accumulated depreciation here. Re-caps the equations for both methods of depreciation. These equations appear in words on screen as she speaks. Goes through the example and the calculation appears on screen in numbers as she speaks.
07:00 – 08:00	Continues going through the example. The calculation appears on screen in numbers as she speaks. Uses quite a bit of repetition. Shows through the calculation how the balance reduces over time, and why this method is therefore called the reducing balance method. Links example to theory. Explains how this small example could be expanded to a large business with many assets, all using their own methods of depreciation. Says that these will need to be recorded in an asset register, and then explains what it entails. The summarised points appear on screen as she speaks. The actual structure of the asset register as it would appear in accounting records is not provided in the video.
08:00 – 09:00	Clearly starts the re-cap [link to sequence]. Re-caps the definition and explanation of depreciation. Re-caps the two methods of depreciation. The names of the two methods appear on screen as she speaks. Re-caps the importance of the asset register. Video ends with no formal sign-off.

Component:	**3.8 Reading: Recording adjusting entries**
Suggested Learning Time:	+-20 minutes
This is a reading from the textbook on recording adjusting entries.	

Component:	**3.9 Video: Lecture example 2: Putting it all together**
Suggested Learning Time:	+- 10 minutes
This lecture video from the facilitator of the course is a mix of talking head, text overlays, and a balance sheet. In this video the facilitator goes through the solutions to questions given in the lecture example in the set of notes from this module.	

00:00 – 01:00	The facilitator explains that this video is about putting everything together. She refers to a lecture example that is given to students in the set of notes in this module. Provides context by explaining where they are in the accounting process. Goes through a question from the lecture example. As she speaks, the question appears on the screen in text. Then a balance sheet with relevant sections filled in appears on the screen.
01:00 – 02:00	Refers to one of the figures on the sheet, and the camera zooms into this figure on screen. She then refers back to the question and says this figure needs to be adjusted. The figure and text appear on screen as she speaks. Refers back to the sheet and it appears on screen. The camera zooms onto the relevant figure on screen – it now reflects the adjusted amount as per the question. Also explains how this adjustment will then be reflected in other accounting records, but does not show these other records on screen.
02:00 – 03:00	Starts going through the next question from the lecture example. The question appears on screen in text as she reads it. Refers back to the sheet and it appears on screen. The camera zooms in on the figure that the question refers to. The question requires a calculation so she explains this and the calculation appears on screen in numbers as she speaks.
03:00 – 04:00	Refers to another entry on the balance sheet that is relevant to the question. The camera zooms into this line on the balance sheet. Another calculation which she explains, and which appears in numbers on screen as she speaks. The camera zooms into the line she is referring to on the balance sheet.
04:00 – 05:00	Goes through another calculation and the calculation appears in numbers on screen as she speaks. Refers back to the balance sheet and the updated amount. The camera zooms into the relevant figures.
05:00 – 06:00	Starts going through the next question. As she reads the question it appears in text on screen. She refers to two tables that are provided in the lecture example in the notes, but these are not shown on screen. Explains these tables using a mix of everyday and accounting language. Some of her key points are summarised in text on screen as she speaks. “Someone who owed us money, so an account receivable on our balance sheet…” “That person is unlikely to pay us…so we are overstating that asset because we are never going to collect the money.”
06:00 – 07:00	Goes through the answer to the question. As she speaks the figures appear on screen. The updated balance sheet is shown on screen and the camera zooms into the relevant line. Starts going through the next question. As she reads the question it appears in text on screen. She provides more context to this question by explaining it in everyday language.

	“Item 4 is a telephone expense. We’ve used the telephone services during February, but we haven’t yet paid for those services.” Explains the link to accrual accounting here. She also emphasizes the importance of using accrual accounting for this question and the term appears on screen in text as she speaks.
07:00 – 08:00	Goes through the solution to the question with a mix of everyday and accounting language. Her key points are summarised in text on screen as she speaks. The balance sheet appears on screen. The camera zooms to the relevant line with the updated figure. Starts going through the next question. As she reads the question it appears in text on screen. Provides context for the question by explaining it with everyday terms.
08:00 – 09:00	Continues explaining the question. “This is going to require a little bit of basic algebra.” The balance sheet appears on screen. The camera zooms onto the relevant line in the sheet. There is a calculation that she explains. As she speaks the calculation appears in numbers on screen. Goes through another equation. As she speaks the calculation appears in numbers on screen.
09:00 – 10:00	Goes through the solution to the question. As she speaks, the figures appear on screen. Refers to another accounting record where this should reflect, but does not show this sheet on screen. The balance sheet appears on screen and the camera zooms onto the relevant line. The adjustment is shown.
10:00 – 11:00	Starts going through the next question. As she reads the question it appears in text on screen. Explains the question in more depth. “For the sake of simplicity, we are going to assume that that interest accrues monthly. Later on in the course you are going to discover the power of compound interest.” [Link to sequence and selection]. Goes through a calculation. As she speaks, the calculation appears in numbers on screen.
11:00 – 12:00	She refers to the balance sheet and it appears on screen. The camera zooms onto the relevant line. She goes through the solution. The key points appear in text on screen. The balance sheet appears again, reflecting the updated amount. Starts going through the next question. As she reads the question it appears in text on screen.
12:00 – 13:00	She explains the question in more depth. She summarises the key points of the question, and these appear in text and numbers on screen as she speaks. She goes through a calculation and it appears on screen in numbers as she speaks.
13:00 – 14:00	The balance sheet appears again on screen. The camera zooms onto the relevant line in the sheet.

	She explains what needs to be calculated to answer the question. She goes through the calculation and it appears in numbers on screen as she speaks. Also provides more context to the solution by using a mix of everyday language and accounting terms. “There is a difference here…an overstatement of income.” “Debit service income…so reduce service income.”
14:00 – 15:00	Balance sheet appears again on screen and reflects the updated figure. She then explains how this updated balance sheet can be used to inform the other financial statements, like the income sheet. Again, she emphasizes the accrual principle of accounting for these types of questions.
15:00 – 16:00	Re-caps the accrual principle. As she speaks, the key points appear as text on the screen. She explains this concept in a mix of everyday and accounting language. The everyday language assists in explaining the accounting concepts. “If we owe people…” refers to “liabilities”, for example. Re-caps another key principle from the video.
16:00 – 17:00	Continues the summary of some of the key points from the video and how these principles can be applied generally. “Thanks for watching this video everyone.” Then the video ends.

Component:	**Class Discussion Forum**
Suggested Learning Time:	N/A
The class discussion forum is a space where the students, facilitator, and Course Coach can interact. In this module there is one focussed content thread where the facilitator has presented a question to the class, related to the theory, and asked them to discuss it. There have been a number of other threads started by students asking the facilitator questions. There are 42 posts in total on the class discussion forum. Of these, 8 of the posts are in the focussed content thread, the rest are student questions and facilitator answers.	
Thread 1	A student asks the facilitator when the results of a tutorial will be released. The facilitator responds with a link where the results can be found.
Thread 2	A student asks the facilitator if an assignment can be submitted in Excel rather than Word as the student feels Excel is an easier programme for these types of questions. The facilitator first acknowledges that she understands the student’s feelings on this, but does say that the assignment still needs to be submitted in Word format. She does say that the student could try copying and pasting from Excel into Word. The facilitator also provides a “note of caution” to the student, reminding the student that in the final exam they will only be equipped with a pen, paper, and a calculator and therefore it is important to practise things manually, which cannot be done in Excel.

Thread 3	A student asks the facilitator if the content for the workshops can be released with the release of the new module so that students have more time to prepare. Another student comments under this post saying that it is a “great point” as this student also struggled. The facilitator thanks the student for a “good suggestion”. She says that while she cannot release the content with the release of a new module, she will try to release it ahead of the workshop. She says that she understands this would help students with note taking during the workshops.
Thread 4	A student asks the facilitator for further explanation on solutions she has posted to an assessment. The student also asks if similar solutions should be given for the exam. The facilitator addresses one of the student’s questions, saying that there was an error in the solutions she released. She then explains how this entry should be recorded in the accounting records. Another student posts, addressing the previous student’s other question which has not yet been addressed by the facilitator. This second student attempts to answer the first student’s question. The second student then addresses another question to the facilitator, asking for more clarity on one of the solutions released by the facilitator. The facilitator then replies, thanking the second student for answering the first student’s question – “you did a great job with your explanation”. She then addresses this second student’s question. She then also provides a tip on assessment: “please keep this example in mind re exam technique. Information is not always asked and presented "neatly" in MF questions!” The facilitator then posts again, answering the first student’s other question. She provides more clarity and explanation than was evidently provided in the solutions. A third student thanks the facilitator for her explanations and comments on her ability to explain things so clearly.
Thread 5	A student asks the facilitator for further clarity on one of the scenarios in the solutions the facilitator posted. The facilitator provides a detailed response, going through each step of the solution in detail. She also provides the relevant accounting entries in this response. Another student asks the facilitator for clarity on one of the points in her response. The facilitator responds, providing further clarity on this point.
Thread 6	A student asks the facilitator a question on the tutorial submission. The student also asks if this type of question will be asked in the tests and exams. The facilitator provides a detailed response addressing the student’s confusion. The facilitator also explains how this type of question will be asked in a test or exam scenario. The facilitator provides another tip for assessment: “Of course, the greatest importance needs to be placed on getting the underlying JEs correct so that the correct debit / credit amounts are posted to the ledger. Try not to get too bogged down in the format and make sure you understand the transactions themselves.”

Thread 7	A student asks the facilitator a number of questions on the tutorial submission. The facilitator provides a detailed response, addressing all the student's questions. The facilitator does refer to how these questions would be asked in a test scenario. The same student asks the facilitator a follow-up question asking for further clarity on her responses. The facilitator responds, providing further clarity. As she has mentioned in a Thread 6, she reminds the student to focus primarily on the transactions rather than the format. While she does not explicitly link this to assessment, it could be interpreted as guidance for the assessments.
Thread 8	A student asks the facilitator two questions which relate to a tutorial submission. The facilitator answers both questions. The student thanks the facilitator for her response and seems happy with it. Another student asks a question related to the test – specifically if something will be included in the test as the student is worried about the time allocation. The facilitator responds and says that she cannot provide more information regarding the test than what has already been released. She then provides some general guidance on managing time constraints in the test, without revealing the actual content of the test.
Thread 9	A student asks the facilitator a number of questions, referring to a tutorial submission. The facilitator addresses all questions. She also refers to how such a question may be approached in a test situation.
Thread 10	This is the focussed content thread where the facilitator presents a theory-related question to the class, in an effort to prompt discussion. This question is not closely related to the accounting transactions and calculations which predominate this module, but is still related to accounting in general, specifically students' thoughts on different forms of accounting software. The facilitator asks students to select an example of an accounting software programme, and to share its pros and cons for small and large businesses with the class. A number of students were able to provide insights from their own work experience, and the software used in their work environments. In most cases their pros and cons were based on actual experience (e.g. struggles with internet speed, or security concerns). There were other students in the discussion who did not refer to any experience with these programmes in a work environment, but rather did their own online research to identify and discuss relevant software. Instances of weakened classification here. The facilitator does not respond to any student posts on this thread.

<u>Recurring themes during observation and reflections on framing and classification:</u>

Classification:

There are a number of instances of weakened classification in the module. In both the readings and the videos, weakened classification is used to explain concepts. A mix of everyday language and accounting terms are used, seemingly in an attempt to explain the accounting terms through language the student would recognise and understand. In the readings these everyday language explanations are usually followed by the accounting term in brackets.

"obligations to pay cash in the future (liabilities)"

"resources that represent cash to be received in the future (debtors)"

In the videos, the facilitator uses simple, everyday language to explain the accounting terms.

"Someone who owed us money, so an account receivable on our balance sheet…"

"That person is unlikely to pay us…so we are overstating that asset because we are never going to collect the money."

While, in the readings, everyday language is used to explain the accounting terms, not many practical examples are used (e.g. examples of accounting in the 'real world'). In this sense classification is a bit stronger than in the contact lectures, where more practical examples are used.

The video used in the web resource uses one basic scenario, as well as actual numbers, and simple, everyday language. In the first lecture video the facilitator uses one scenario to explain the concepts in the video. There are few references to other, real world examples of accounting in use, however. In these videos classification is a bit weaker than the readings, but still stronger than the contact lectures where more practical examples are used.

I have noticed something interesting about the differences in classification between the online and contact course, and the different teaching styles in evidence. While both courses use weakened classification to some extent, it is done so in different ways.

In the contact lectures the lecturer uses many everyday examples to which he seems to think students can relate. There are a few context-specific examples relevant to the university (a context shared by all students in the class), as well as examples he seems to think are relevant to young people or university students in general. This weakened classification is used in an apparent attempt to demonstrate how these accounting concepts are used in the 'real world'. This is possibly in an effort to help clarify the

concepts, or to encourage interest from the students, given the subject's relevance to their lives, or a combination of the two.

In the online course, there are practical examples or scenarios used, but not to the same extent. In the first lecture video the facilitator uses one scenario, and keeps referring back to this as she goes through the content. A form of weakened classification that is common in the online course, however, is the use of everyday language to explain accounting terms, as explained above. Often in the lecture video the facilitator will describe something in simple, layman's terms, and then repeat it using the accounting terminology.

So she is using weakened classification between everyday and accounting language. He is using weakened classification between the theory and everyday scenarios.

[Could look at a visual representation for this].

Evaluative Criteria:

The practice quiz in this module contains 20 questions. Of these 20 questions, 12 are in the format of true/false questions on theory from the module, the remaining 8 are multiple-choice questions.

14 of these questions are purely theoretical with no application, while the remaining 6 feature scenarios where students are asked to apply their knowledge.

Is this practice quiz the ideal formative assessment to prepare students for the graded assessments? I will need to analyse the test before conclusions can be drawn. My initial assumption is that this practice quiz will not sufficiently equip students for the requirements of the test, and may even be misguiding for students in how they prepare for this test. As discussed above, the bulk of the questions in this quiz are theoretical rather than practical in nature. My assumption is that the test will place more of an emphasis on application of theory (e.g. doing calculations, filling in accounting records, etc.) rather than simple repetition or understanding of theory.

Interestingly, the dominance of true/false questions in the practice quiz, somewhat mirrors the questions posed to the class by the lecturer in the contact lectures. The lecturer often poses questions to the class that have two answer options – e.g. increase/decrease, debit/credit, etc.

There is some guidance provided on evaluative criteria in the module, primarily in the lecture videos and the class discussion. In the lecture videos the facilitator makes some reference to assessments, and the types of questions or structure of questions in the assessments, although she does not always explicitly state the link to assessments.

"If you get a question like that…"

Explains that in this method of depreciation certain figures will be provided (seems to be referring to assessment).

[Extracts from first video notes.]

She is even more open about the evaluative criteria in the class discussion forum, although she still keeps some information under wraps. In the majority of the threads in the discussion forum she refers

to assessment in some manner. At times she provides examples of how certain types of questions would be asked in a test or exam setting. At other times she provides general guidance on assessment.

“Try not to get too bogged down in the format and make sure you understand the transactions themselves.”

““please keep this example in mind re exam technique. Information is not always asked and presented "neatly" in MF questions!”

[Extracts from threads 6 & 4]

There are limits, however, to the amount of information she will provide on assessments:

The facilitator responds and says that she cannot provide more information regarding the test than what has already been released. She then provides some general guidance on managing time constraints in the test, without revealing the actual content of the test.

[Extract from notes on thread 8]

In general, the lecturer in the contact classes seems to be more open and explicit regarding the content of tests and exams than the facilitator of the online class.

In Thread 10, the facilitator proposes a discussion topic to the class regarding their thoughts on different accounting software. As in the case of the practice quiz, I am not sure if this is the most effective method of formative assessment for preparing students for the graded assessments of the course. Again, an analysis of the test will be required before conclusions can be drawn.

Maybe the purpose of this discussion is not related to assessments at all. Maybe this discussion is useful simply for the working context (as it is very practical), and there is no link to assessment. The link to the content of the module is also not immediately clear, as this topic does not really relate to the topics that have been covered in the module. The question requires weakened classification by its nature, and many students brought in their own workplace experiences. Even if this question was linked to assessment in some way, it would be hard for the student to perceive that as no explicit link is made to assessment. It would also be difficult for students to get value out of this exercise in terms of preparing for assessments, as no grading is carried out, and the facilitator does not provide any feedback on student posts.

Hierarchical Rules:

The main points of interaction between the facilitator and students are the class discussion forum and the live sessions, such as workshops.

In general, the facilitator's communication on the class discussion can be considered friendly, helpful, and supportive, but firm where necessary. In Thread 2, for example, the facilitator acknowledges the student's feelings but does stay firm in the requirements for the assessment. She then provides a suggestion on how the student could still work in Excel, but submit assignments in Word, as well as providing a "note of caution" for the final exam.

In Thread 3, she thanks a student for a "good suggestion" regarding the release of the workshop content ahead of time. While she cannot fully fulfil the student's request, she does make a compromise so that the content can be released in advance.

Given the nature of the class discussion forum in this kind of learning environment, students are able to post whenever and as often as they choose. They do not require permission from the facilitator to post. In this case the facilitator addresses all student questions she receives. This creates quite open lines of communication between facilitator and students. In most cases students address the facilitator by her first name when asking questions, and she responds by addressing them by their first names when responding to questions. This goes some way to creating familiarity between the facilitator and students.

Pace:

Given that all module content is released in one go, and given that only the live sessions require synchronous learning and communication, students can control their pace of learning to some extent. They can choose how long they spend on the module content over the two-week period, and can even go back at later stages of the course to access content.

A suggested learning time is offered for each component of the learning path. This can assist students in managing the pace of their learning. I have noticed, however, that the suggested learning time may be too short in some cases. In the case of the videos, the suggested learning time simply accounts for the length of the video itself. It does not account for the full time students may choose to spend on this component – e.g. pausing the video and taking notes, going back to earlier points in the video for repetition. The second video provides a suggested learning time of 10 minutes, when the actual video length is 16 minutes, which seems to be an error.

Sequence:

The structure of the module presents a clear learning path. Learning activities are broken down into two units, and learning activities within those units are numbered, suggesting the order in which students should access those various learning activities. Students, however, have the power to access the learning activities in whichever sequence they choose.

Within the learning activities themselves, there are also links to sequence. The readings have clear headings for each section. In the video, the facilitator also makes some reference to sequence. In the

first video, for example, she makes a clear distinction between each method of depreciation discussed. The text appearing on screen as she speaks also assists with making this sequence explicit. It is also clear when she begins the re-cap of the video at the end.

In the second video the facilitator goes through each question in the lecture example step-by-step. Each question also appears in text on the screen as she speaks, helping to make this sequence through the questions explicit.

My first impression is that the online course presents a clearer sequence in comparison to the contact course.

Selection:

The content of this module is quite clearly established, and there is little room for students to participate in selection.

Given the nature of the content itself, there is often only one right answer (e.g. a calculation), which further constrains students' ability to select.

The class discussion in Thread 10 is an instance of weakened framing over selection as students have the ability to choose whichever accounting software they like and discuss it. This discussion, as mentioned above, may not be the most effective formative assessment for this course. This instance of weakened framing over selection, therefore, may not be an accurate representation of the requirements of the assessments. Whether students recognise this or not will have to be analysed when looking at the test.

The class discussion also presents other instances of weakened framing over selection to some extent. Students are able to start their own threads and ask the facilitator questions on the assessments or course content. While these questions still relate to the already selected content of the course, students do have some control over what is discussed in the class discussion.

Other notes:

The second video in the module is the one that most closely mirrors the structure of the contact lectures. The balance sheets and accounting records are shown on screen and the facilitator goes through a lecture example step-by-step, as done in the contact classes. The contact classes differ in that the lecturer asks for student participation in filling out the accounting records on the board, and is stopped often for student questions. The lecture video for the online class is less interactive. The accounting records that are shown on screen are also those that are already filled in, while the lecturer in the contact lectures fills in the records as he goes.

The learning outcomes of the module seem to be emphasized more in the online course than the contact course. The online course features two learning outcomes questionnaires – one at the start and

one at the end of the module. Each learning activity also features the relevant learning outcomes, so that students know what they are supposed to be gaining from each component.

As mentioned previously, there are few practical examples used in the readings. The readings also feature very few numbers or calculations. In most cases symbols are used in place of numbers. This could have been done in an attempt to clearly show the principles behind recording these transactions, rather than focussing on the numbers themselves, which may confuse students and detract focus from the principles. In the contact lectures, however, actual numbers and calculations are used the majority of the time.

In the lecture videos, actual numbers and calculations are used, but often the accounting records discussed are not shown on screen:

- Refers to the accounting entry and how it would be recorded. However, the entry does not appear on screen, she is just explaining it verbally.
- Says that these will need to be recorded in an asset register, and then explains what it entails. The summarised points appear on screen as she speaks. The actual structure of the asset register as it would appear in accounting records is not provided in the video.

[Extracts from notes on first video]

In the contact lectures, quite a bit of time and emphasis is given to drawing and filling in the accounting records on the board.

The infographic in this module contains much of the same information as presented in the readings, but here it is presented in a more visual manner. The infographic could also be considered more interactive than the readings because students can choose different branches.

In the lecture videos, the text on screen is mainly used for two key functions – summarising the main points the facilitator is discussing, and showing the calculations she goes through in numbers. This could assist in emphasizing to students what is most important in the content of the video.

Appendix 5: Summary of assessments

Introduction to Marketing: Assessments Summary

The below table summarises some of the key aspects of the Introduction to Marketing assessments and marking rubrics under study. The first row, 'Assessment structure of the course' provides an overview of the assessment structure of each course. Only one assessment from the online course, and one assessment from the contact course will be analysed in this study, and that assessment, as well as its accompanying marking rubric, are described in the remainder of the table. The Introduction to Marketing contact assessment and marking rubric can be found in Appendix 6. The Introduction to Marketing online assessment and marking rubric can be found in Appendix 7, and Appendix 8.

Table 11: Introduction to Marketing assessments: Comparison

	Online	**Contact**
Assessment structure of the course	Duration of the course is one semester. The course is split into 50% coursework and 50% final exam. This course has the following assessments and weightings: - Group Project (15%) - Four smaller case study assignments (8% - best 3 out of 4 marks are included in this calculation) - Class Test (17%) - Major assignment (10%)	Duration of the course is one semester. The course is split into 50% coursework and 50% final exam. This course has the following assessments and weightings: - Group Project 1 (25%) - Group Project 2 (25%)
Assessment under study	This is a major assignment in the form of a 1200-1500 word	This is a group project in the form of a 3-question

	essay based on a case study of casual dining restaurant chain, Nando's. It is an individual assignment.	submission of 5000 – 5500 words (in total). This project is also based on a case study, specifically a case study of South African retailer, Woolworths. This case study is slightly shorter than the Nando's case study. Students are required to work in groups of two students. The lecturer is open to students working individually if they wish.
Question	One long essay question. 100 marks in total for the question. This is an application question in which students are asked to apply theory from the course to the case study and brand.	Broken down into three questions. Weightings per question are shown – 25, 25, and 50 marks respectively. This is likely to indicate how much time/effort students should dedicate to each question. All questions are application questions in which students are asked to apply certain aspects of theory to the case study and brand.
Marking Rubric	Quite detailed marking rubric used, but not given to students before or after assessment deadline. This rubric is tailored to the specific assignment rather than a generic rubric. It is broken down into relevant sections of theory from the course, with mark allocations per section of theory (even though these mark allocations are not provided to students in the assignment document). It includes suggestions of points students could have included in relation to each	Marking rubric used (less detailed than the online rubric). This rubric is provided to students with the assignment guidelines. More transparency in terms of evaluative criteria than the online course. This rubric is quite a generic one that could be applied to any assessment in the course, and includes categories like 'relevance to the case study', and 'evidence of research'. Mark allocations are provided for each section of the rubric.

	section of theory, with reference to the case study. Seems to be focused on guidance and support for markers.	
STP	As this study focuses on the STP section of the course, it is important to note how much emphasis is placed on this section of the work in the assessment. In this assignment the STP section is weighted at 20% of the assignment mark.	As this study focuses on the STP section of the course, it is important to note how much emphasis is placed on this section of the work in the assessment. In this assignment the STP section is weighted at 50% of the assignment mark.

Managerial Finance: Assessments Summary

The below table summarises some of the key aspects of the Managerial Finance assessments and marking rubrics under study. The first row, 'Assessment structure of the course' provides an overview of the assessment structure of each course. Only one assessment from the online course, and one assessment from the contact course will be analysed in this study, and that assessment, as well as its accompanying marking rubric, are described in the remainder of the table. The Managerial Finance contact test and marking rubric can be found in Appendix 9, and Appendix 10. The Managerial Finance online test and marking rubric can be found in Appendix 11, and Appendix 12.

Table 12: Managerial Finance assessments: Comparison

	Online	**Contact**
Assessment structure of the course	Duration of the course is two semesters. Course is split into 40% coursework and 60% final exam. This course has the following assessments and weightings:	Duration of the course is one semester. Course is split into 40% coursework and 60% final exam. This course has the following assessments and weightings:

	Class Test 1 (5%) Class Test 2 (5%) Class Test 3 (5%) Class Test 4 (5%) Objective Tests (5%) Investment Project (7.5%) Business Plan Project (7.5%)	Class Test 1 (5%) Class Test 2 (15%) Objective Tests (Best out of 5) (5%) Investment Project (7.5%) Project (7.5%)
Assessment under study	60 minute class test (Class Test 2) 3 major questions (with sub-questions)	90 minute class test (Class Test 1) 2 major questions (with sub-questions)
Question	Question 1 has three sub-questions and a bonus question. Students are provided with the completed trial balance of a fictional company. They are then provided with a number of adjustments which need to be recorded. The first sub-question (for 12 marks) asks students to prepare journal entries for all these adjustments. The second sub-question (for 2 marks) asks students to show how the rent adjustment must be recorded. The third sub-question (for 16 marks) presents students with a net profit figure and asks them to draw up the statement of financial position given this net profit figure and the adjustments above. The bonus question (for 1 mark) is also based on the fictional company in the question, and students are asked to calculate a dividend.	Question 2 has three sub-questions and four bonus questions. Students are provided with the completed trial balance of a fictional company. They are then provided with a number of adjustments which need to be recorded. The first sub-question (for 12 marks) asks students to prepare journal entries for all these adjustments. The second sub-question (for 11 marks) asks students to prepare the statement of comprehensive income for this fictional company. The third sub-question (for 17 marks) asks students to prepare the statement of financial position for this fictional company. The four bonus questions (for 1 mark each) mainly cover current affairs in the South African and global finance space. The first bonus question asks students for the share prices of two South African companies. The second asks them to name countries within BRICS – the association of emerging economies. The third asks them to provide the current interest rate of government bonds. The fourth bonus question is based on the fictional company

		in the question, and students are asked to specify how many class A shares this company issued.
Marking Rubric	The marking rubric provides the model answers and shows the mark allocated for each correct answer. On a journal entry, for example, the rubric will indicate how many marks are allocated to each line or entry. Marks for each entry range between 0,5 – 2 marks. This marking rubric is not given to students after the test. Appeals for a remark can still be made but the students do not have the marking rubric to refer to when making these appeals.	The marking rubric provides the model answers and shows the mark allocated for each correct answer. On a journal entry, for example, the rubric will indicate how many marks are allocated to each line or entry. Marks for each entry range between 0,5 – 2 marks. This marking rubric is given to students after the test. Students have 10-15 minutes during a tutorial session to go through their marked scripts. If there are any errors in marking the students can raise this with their tutor to have their marks corrected. The lecturer has explained that the rubric is made available so that they can be as transparent as possible with students regarding how they mark.
Adjustments and Annual Financial Statements	As this study focuses on the Adjustments and Annual Financial Statements section of the course, it is important to note how much emphasis is placed on this section of the work in the assessment. Question 1 is dedicated to this section of the content, with a weighting of 60% of the total test mark.	As this study focuses on the Adjustments and Annual Financial Statements section of the course, it is important to note how much emphasis is placed on this section of the work in the assessment. Question 2 is dedicated to this section of the content, with a weighting of 53% of the total test mark.

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Appendix 6: Introduction to Marketing contact assessment and marking rubric

BUS2011F:

INTRODUCTION TO MARKETING

Project 2: Woolworths

Table of Contents

1. Instructions and Guidelines

Guidelines

1. The report must be completed in MS Word.

2. Please be sure to conduct your own research into the South African retail market to inform your recommendations. Your project should be well-researched and referenced using suitable sources of secondary data such as A-rated marketing journals. Please reference your sources appropriately using the Harvard-UCT referencing style.

3. Your submission must not be longer than 5 000 – 5 500 words. Answers that exceed the maximum word limit will be penalised.

4. This project is due on **03 May 2018** and must be uploaded onto VULA by 5PM.

Mark allocation

Total Marks = 100

2. Case study

Read the following case study on ***Woolworths*** and then answer the questions that follow.

BACKGROUND

Woolworths has become very well-known over the last few years, the name is associated with favourable qualities and there is a very positive perception of the brand. This is an indication of the success with which the brand values have been communicated and reinforced. These values are quality and style, value, innovation, service, integrity, energy, and sustainability. The market

situation is complex because Woolworths serves many different target markets with a variety of products from one store.

Their marketing strategies revolve around some core values including integrity, energy, and sustainability. The success of the Woolworths brand, especially over the last decade can be seen in their growth. Woolworths has won the internationally respected 'Responsible retailer of the year award from the World Retail Congress in recognition of its business practices, known as the Good business journey'. Woolworths is competing against different competitors in different product categories. The food business is a premium, value-added offering targeting the upper-end market. The market offering in terms of clothing, home and beauty business offers key wardrobe building blocks at affordable prices to the aspirant middle to upper market. Woolworths serves a slightly higher income group market with a market offering that is slightly inclined to value as opposed to purely fashion.

The Woolworths' core philosophy is underpinned by quality and value, offering customers consistently high-quality merchandise at affordable prices and incorporating innovative developments across the business. Woolworths occupies a unique brand position: it attracts upper-income consumers in the higher LSMs and is a highly desirable shopping destination for aspirational consumers. One would not normally associate any retailer with product development and product innovation research, however, Woolworths employs two teams of scientists, one team specializing in clothing and homeware, the other in food science. Innovation is considered to be a Woolworths critical differentiator and is at the core of their product development philosophy, alongside quality and value. Examples of a commitment to innovation include an organic clothing range, use of renewable sources of natural fiber, sustainable development of the local wool value chain and a range of private-brand beauty products developed with an emphasis on natural, gentle ingredients. As the chief executive officer of Woolworths says, 'Woolworths attracts consumers on the basis of quality, innovation, freshness and unique placements, such as its free range and organic products.'

***Source**: Cant, M., and Machado, R. (2013). 'Marketing Success Stories', Oxford University Press. Cape Town, South Africa.*

3. Question

'Woolworths has not only re-defined itself but also the industry in which it operates and has provided South Africans with a unique shopping experience'. Against the backdrop of this statement, present a critical discussion on the following questions:

(3.1) The various marketing management philosophies especially as they pertain to the Woolworths brand (25 marks).

(3.2) The competitive structure of the industry in which Woolworths functions (25 marks).

(3.3) The segmentation, targeting, and positioning strategy to be adopted by Woolworths to facilitate the launch of only one new product from either the food or clothing or home and beauty range [you may choose a specific product category, but please identify your specific product category of choice in your discussion] (50 marks).

(100 Marks)

4. Project Marking Rubric

	Unsatisfactory	Limited	Accomplished	Exceptional
Application of theoretical concepts **40 marks**	**0-15** A weak understanding of theoretical concepts and application to the case is lacking overall.	**16-23** A limited understanding of theoretical concepts and application to the case is lacking in some critical areas.	**24-29** A good understanding of theoretical concepts and is able to apply these concepts to the case with few gaps.	**30-40** A sophisticated understanding of theoretical concepts and is able to skillfully apply these concepts to the case at hand.
Relevance to the case study **35 marks**	**0-13** Very little understanding of the key issues of the case, and the final project barely addresses these issues.	**14-20** Limited grasp of the key issues of the case. The final project addresses these issues, but with significant gaps.	**21-26** Good grasp of some of the key issues in the case, and their final project addresses these issues well.	**27-35** A sophisticated grasp of the key issues of the case, and addresses them skillfully in their final project.
Evidence of research	**0-5** There is very little	**6-8** There is evidence of	**9-11** There is evidence of	**12-15** There is clear

15 marks	or no evidence of research. Any research present is not well integrated into the final project.	limited research which is somewhat integrated into the final project.	satisfactory research, which is integrated into the final project.	evidence of extensive, thorough, and relevant research. Research findings are well integrated into the final project.
Quality of writing and referencing **10 marks**	**0-3** The project is poorly written, with many spelling and grammatical errors. Layout and formatting is flawed. There is little to no evidence of referencing, and any referencing carried out is flawed.	**4-5** The writing of the project is average to weak, with a number of spelling and grammatical errors. Layout and formatting is somewhat flawed. The Harvard-UCT referencing style is used, but in a limited sense, with a number of errors.	**6-7** The project is well written, with few spelling or grammatical errors. Layout and formatting is satisfactory. The Harvard-UCT referencing style is used accurately, with few errors.	**8-10** The project is superbly written with no spelling or grammatical errors. Layout and formatting is professional and attractive. The Harvard-UCT referencing style is used accurately, without error.

Appendix 7: Introduction to Marketing online assessment

ASSESSMENTS MODULE

Case study: Nando's

Note: This case study is required reading for the Assessments Module major assignment.

Nando's: A history of South Africa's most successful restaurant group

Nando's is undoubtedly South Africa's most successful restaurant group export. It has its roots in Rosettenville, South Africa. It all started when Robert Brozin and Fernando Duarte, friends and colleagues, opened their first Nando's restaurant in 1987. Brozin's vision for the brand was to have fun and make money at the same time. Early on Brozin and Duarte had decided they wanted to create a multi-national brand and just two years later they had added an additional two outlets in Johannesburg and one in Portugal. Shortly thereafter a national roll-out commenced. Although the Portuguese operation ultimately failed, Nando's has subsequently very successfully grown its footprint to more than 1,000 outlets in over 30 countries, including the UK, USA, and Australia.

Brozin brought a marketing expert with a background in fast food and significant experience in franchising on board and Nando's soon had a multi-national presence. The company utilises a franchising model. This poses certain challenges for the brand. As the operation of the various outlets is left up to franchisees, it is more difficult to maintain standardised levels of product quality and service. The average waiting time for service in their Sandton outlet, for example, is often significantly shorter than the waiting time in other Johannesburg outlets.

Nando's biggest challenge was a lack of budget and the fact that they were up against competitors with deep pockets. Any marketing and advertising initiatives needed impact in order to get maximum bang for their buck. In spite of a limited marketing budget, the brand quickly became well known for its witty, humorous, and often controversial advertising campaigns. Its advertising frequently took on the role of social commentator with the brand's satirical comment on social, cultural, and even political issues often landing Nando's in hot water. This is a brand characteristic Brozin never wants Nando's to lose.

In South Africa, the brand has produced an array of iconic television ads, many of which have gone viral in recent years. The "Diversity" TV campaign, which took a controversial look at xenophobia in South Africa, was quickly banned by some TV broadcasters. Pulling a controversial Nando's ad off air due to backlash or banning, not surprisingly, garners even more attention. "Diversity", for example, quickly went viral on social networks and had 85,000 views on YouTube the first two days it appeared.

Although their controversial adverts have become very popular and generate significant word-of-mouth for the brand, they tend not to provide great detail on the brand's product offerings.

Many would argue that the South African market for fast food outlets and restaurants is almost at the point of saturation. Nando's faces significant competition from a number of brands. The following table lists a number of Nando's main competitors and their comparative prices:

Brand	Meal	Price
Nando's	**Burger Meal (Chicken or veggie burger, any regular side & a 330ml soft drink)**	**R49.90**
Steers	Chicken burger, regular chips & a 330ml soft drink.	R43.90
Chicken Licken	Big John chicken burger, regular fries & 330ml Coke.	R34.90
KFC	Colonel Burger Meal (chicken burger, regular drink, regular chips)	R45.90

Unlike their competitors, Nando's is the only takeaway outlet offering authentic Mozambican/ Portuguese-style flame grilled, peri-peri chicken. Most of their competitors' chicken offerings are fried and do not have the peri-peri flavours. Nando's products are therefore healthier than many other takeaway options. Other than a few vegetarian options, the menu is only chicken offerings, and even their logo is a chicken. They also offer a home delivery service in specified areas.

In addition to the fierce competition in the SA market, Nando's also has to be wary of the state of the economy, which affects South Africans' consumer behaviour. While many restaurants and

takeaway outlets experience a drop in sales during tough economic times, others experience a sales increase, if their products are priced very competitively.

In spite of the success of Nando's advertising locally, the brand does not run global marketing campaigns. Unlike many other global brands, Nando's has somehow morphed into one of the most "elastic" brands in existence. Due to the "elastic" nature of the brand, they are able to implement specific services relevant to the country in question: the model could be take-out in one country, full service restaurants in another, and perhaps even a combination in yet others.

In the UK, for example, they have moved away from the takeaway model to what is termed as "fast casual dining". Customers order at the counter and then find a table, and wait for their food to be brought by the server. The atmosphere is relaxed and fun.

For any entrepreneurial business which experiences massive growth, the biggest threat is that it loses its original soul, particularly as large company processes and structures are put in place. Brozin's focus is to safeguard Nando's intrinsic brand properties and essentially to maintain the soul of the brand.

Full name	
Student number	
Course code	BUS2011Q

Instructions (read carefully)

1. **Insert your details** in the space provided above.

2. **Rename the file** to include your **full name and student number**: **e.g. UCT INTM Major assignment_Lilly Smith_SMTLIL001. (NB!** *Please ensure that you use the name that appears in your student profile on the Virtual Learning Environment (VLE).)*

3. Write all your answers in this document. There is an instruction that says, "Start writing here" under each question. Please type your answer there.

4. Submit in **Microsoft Word only**. No other file types will be accepted.

5. **Do not delete the instructions**. They must remain in the document when you submit.

6. Make sure that you have carefully read and fully understood the questions before answering them. Answer the questions fully but concisely and as directly as possible. Follow all specific instructions for individual questions (e. g. "list", "in point form").

7. Answer all questions in your own words. Do not copy any text from the notes, readings or other sources. **The submission must be your own work only.**

8. Ensure that you **submit a signed and dated plagiarism declaration** along with this document. Your submission will not be marked if you do not attach a valid declaration.

9. Refer to the instructions on the VLE for further information.

2. Mark allocation

Question 1	100
TOTAL	**100**

3. Question

Brozin and his team are considering possible strategic growth opportunities for the Nando's brand in South Africa. Imagine that you are the marketing expert advising the team. Which strategic growth opportunity do you think is most suitable for the brand and why is this the case?

Justify your decision by drawing on the theory you have covered so far in the course. In your answer, be sure to refer to your interpretation of the brand essence of Nando's, and whether you think this is being communicated sufficiently in the brand's marketing efforts.

Prescribed word count: 1200-1500 words. Please note that anything over the maximum count will not be marked.

Start writing here:

Appendix 8: Introduction to Marketing online assessment marking rubric

MAJOR ASSESSMENTS

Major Assignment Rubric

In this assignment, students are asked to choose a strategic growth opportunity for the Nando's brand.

Students need to choose one of the four strategic growth opportunities from the product/market expansion grid and then justify their choice by drawing on relevant theory. These are the main areas of theory they can draw on (besides the P/M expansion grid):

- Situational Analysis (SWOT – including macro and micro considerations)
- STP and branding
- Customer relationship management

The second part of the question asks them to discuss the brand essence of Nando's. The student should identify that the brand image portrayed in Nando's marketing communication does not communicate to the customer the product and health benefit of Nando's products. They may argue that while a fun, cheeky brand image is important for the brand to stand out, they also need to emphasize their key points of differentiation from competitors – i.e.:

- The fact that they are the only takeaway outlet offering authentic Portuguese/Mozambican style food
- Their options are healthier than most of their takeaway competitors, especially KFC, Steers, etc.

I have created a separate marking rubric for each option in the P/M expansion grid. You only have to use one of these rubrics (depending on which option the student you are marking has chosen):

Market Penetration Strategy:

	Unsatisfactory	**Limited**	**Accomplished**	**Exemplary**
Market Penetration: Possibly opening more outlets or different types of outlets. The case discusses how Nando's global strategy is to adapt their offering based on the context or area they find themselves in. So maybe they could open more dining restaurants in wealthier parts of SA (up-market malls or shopping areas, for example) and those in poorer areas could be pure takeout outlets (easily accessible stores in areas with high foot traffic, along major transport routes). Changing the format of the store for different segments of their market. They could also increase advertising to their existing target market, or have a different focus for this advertising. They could include more detail of their product offerings and points of differentiation from competitors (as listed under brand essence).				

They could also utilize more unconventional forms of marketing communication. They already sponsor comedy festivals. Maybe they could also 'sponsor' certain comedy shows on TV or create a comedy YouTube channel. There are various possibilities with this strategy. They are free to mention other tactics, as long as they justify them.				
Market Penetration **30 marks**	(0-11) Student barely makes any argument for their choice.	(12-17) Student provides very limited evidence or argument for their choice.	(18-22) Student discusses this option and argues for it, but not with enough insight to gain a first.	(23-30) Student makes a strong argument for this strategic growth option based on evidence from the case.
Macro: **Economic:** Many customers in SA have limited disposable income and many financial pressures. If Nando's offers fast casual dining outlets that still have a pleasant atmosphere rather than a takeout atmosphere, for example, their customers can still feel like they are treating themselves and going out for dinner, but for much less. This means that Nando's could also get a bigger share of wallet of existing customers as they could go to Nando's for both takeaways and for dining out. **Demographic:** By targeting different segments of the market they would need to take these demographic considerations into account, especially when it comes to income levels. **Political/Legal:** The brand is known for its political satire in its advertising. Politically, there is a lot going on in SA which they could take advantage of for their advertising.				
Macro **20 marks**	(0-7) Student barely mentions the macro-environment.	(8-11) Student provides a limited discussion of the macro-environment.	(12-14) Student provides a good discussion of the macro-environment but does not show enough insight to achieve a first.	(15-20) Student provides a strong and insightful discussion of the macro-environment, drawing on the points above, or their own points justified by theory and evidence.

Micro:

Competitors: There are many competitors in this market in SA. Many competitors are also trying to position themselves as healthy in their offerings and ethical in their business dealings, so Nando's needs to be aware of this competition and they need to ensure they can face it head-on. This may mean placing more emphasis on their product offerings and the nature of their business, rather than on satire and humour alone (again this links to brand essence).

It is also important to point out not only the direct competitors but also the indirect competitors. Many retailers (such as Woolworths) offer readymade meals which you can pick up on your way home from work and just heat up in the microwave. This is an alternative to a Nando's meal.

The firm: The group has to adapt and remain relevant and competitive, but at the same time they need to maintain the 'soul' of the brand as they expand, as mentioned in the case. So even if they are changing the structure or nature of some of their outlets, or placing emphasis on product characteristics in their advertising, they still need to maintain a relatively consistent positioning and brand identity.

Micro **20 marks**	(0-7) Student barely mentions the micro-environment.	(8-11) Student provides a limited discussion of the micro-environment.	(12-14) Student provides a good discussion of the micro-environment but does not show enough insight to achieve a first.	(15-20) Student provides a strong and insightful discussion of the micro-environment, drawing on the points above, or their own points justified by theory and evidence.

STP and Branding:

If Nando's decides to alter their offering depending on the location of the store, they will need to ensure their segmentation and targeting strategy is clear, especially based on geographic locations.

Students may also discuss the various segments of the SA market here, and which segments Nando's would appeal to (as well as how they can change their offering to best appeal to these segments). E.g. Skilled Strugglers, Black Diamonds, etc.

The case discusses how the owners of Nando's want to maintain the 'soul' of the brand. They still need to maintain a relatively consistent positioning and brand identity, regardless of which alterations they are making to their strategy.

They can discuss brand essence again here.				
STP and Branding **20 marks**	(0-7) Student barely mentions STP and branding.	(8-11) Student shows limited insight into the STP and branding considerations.	(12-14) Student shows good insight into the STP and Branding considerations but not enough to gain a first.	(15-20) Student shows great insight into the STP and branding considerations.
CRM: Nando's doesn't really have a CRM strategy currently. It may be wise for them to invest in one. Kauai, for example, has a loyalty card (which has now become a loyalty app), and so does Spur.				
CRM **10 marks**	(0-3) Student barely mentions CRM.	(4-5) Student provides a limited discussion of CRM.	(6-7) Student makes a good CRM suggestion for the brand but does not show enough insight to gain a first.	(8-10) Student discusses CRM and makes an insightful suggestion for the brand.

TOTAL: 100 marks

Market Development Strategy:

Market Development: Nando's has done well internationally and has been able to adapt to their various markets. The student could suggest they expand to new countries – possibly certain African countries as there is a growing black middle class (with increased spending power) who may have demand for a good quality, yet affordable restaurant. Maybe Nigeria or Kenya. Or, Nando's could decide to target new markets within SA. They could use their different formats (like takeout, or fast casual dining, or restaurant), to appeal to different segments within the same city. This is what Primi and Col Caccio have done. They have nice restaurants but also have fast casual dining and takeaway options. In this way they could also appeal to various needs within the same customer. So fulfil this customer's need for a night dining out, as well as for a quick takeaway – this means Nando's could gain a greater share of wallet of their customers.				
Marked Development **30 marks**	(0-11) Student barely makes any argument for their choice.	(12-17) Student provides very limited evidence or argument for their choice.	(18-22) Student discusses this option and argues for it, but not with enough insight to gain a first.	(23-30) Student makes a strong argument for this strategic growth option based on evidence from the case.
Macro: **Economic:** A growing black middle class within South Africa, as well as Africa in general, with increased spending power. **Demographic:** Nando's will need to research the demographics in other countries, if they choose to expand to other countries, to see if these suit their broader target market. **Technological**: This would have an impact on advertising. Most consumers in African countries are very dependent on their mobile phones (and these are generally not smart phones) so Nando's needs to ensure their advertising and promotions are mobile-friendly and are compatible with feature phones. This would also be a consideration if they decided to have a loyalty app. **Political/legal:** possible legal considerations of opening outlets in new countries, have to follow regulations of that country.				
Macro **20 marks**	(0-7)	(8-11)	(12-14)	(15-20)

	Student barely mentions the macro-environment.	Student provides a limited discussion of the macro-environment.	Student provides a good discussion of the macro-environment but does not show enough insight to achieve a first.	Student provides a strong and insightful discussion of the macro-environment, drawing on the points above, or their own points justified by theory and evidence.
Micro: Competitors: If Nando's decides to expand to new African markets, they will need to do their research about the competitors in new countries (both direct and indirect), as they may not be familiar with these new markets. Even if they expand within SA to new target markets, they will need to identify the competitors frequented by their new target market. The firm: Nando's will need to adapt to the new market but still remain true to the 'soul' of the brand. Suppliers: They would need to set up a supplier network in the new country, this may be quite costly. Marketing intermediaries: They would need to find new marketing intermediaries as well.				
Micro **20 marks**	(0-7) Student barely mentions the micro-environment.	(8-11) Student provides a limited discussion of the micro-environment.	(12-14) Student provides a good discussion of the micro-environment but does not show enough insight to achieve a first.	(15-20) Student provides a strong and insightful discussion of the micro-environment, drawing on the points above, or their own points justified by theory and evidence.
STP and Branding:				

If Nando's decides to target a new market, whether in Africa or SA, they will need to ensure their segmentation and targeting strategy is clear and that they have chosen to target a profitable and substantial segment. Students may also discuss the various segments of the SA market here, and which segments Nando's would appeal to (as well as how they can change their offering to best appeal to these segments). E.g. Skilled Strugglers, Black Diamonds, etc. The case discusses how the owners of Nando's want to maintain the 'soul' of the brand. They still need to maintain a relatively consistent positioning and brand identity, regardless of which alterations they are making to their strategy. They can discuss brand essence again here.				
STP and Branding **20 marks**	(0-7) Student barely mentions STP and branding.	(8-11) Student shows limited insight into the STP and branding considerations.	(12-14) Student shows good insight into the STP and Branding considerations but not enough to gain a first.	(15-20) Student shows great insight into the STP and branding considerations.
CRM: Nando's doesn't really have a CRM strategy currently. It may be wise for them to invest in one. Kauai, for example, has a loyalty card (which has now become a loyalty app), and so does Spur.				
CRM **10 marks**	(0-3) Student barely mentions CRM.	(4-5) Student provides a limited discussion of CRM.	(6-7) Student makes a good CRM suggestion for the brand but does not show enough insight to gain a first.	(8-10) Student discusses CRM and makes an insightful suggestion for the brand.

TOTAL: 100 marks

Product Development strategy:

Product Development:

Which new products could they offer which would appeal to their existing target market (as well as gaining a greater share of wallet of this market)?

Maybe more vegetarian options, health options, even banting options (like Col Caccio has done). In this way they could get a greater share of wallet of existing customers – these customers would not only see Nando's as a treat once in a while but also a regular part of their diet (still able to stay healthy and stay on their diet).

Could offer more gourmet options on their menu – raise the positioning of the brand slightly. Then they could even take part in events like Taste of Cape Town and Good Food and Wine Show.

They could extend the peri-peri, flame grilled, Portuguese/Mozambican flavour to other product offerings – maybe sea food and meat – it would be tricky here to maintain the brand identity which has been focussed on chicken (even a chicken logo), but this may broaden their appeal if done gradually and carefully.

Product Development **30 marks**	(0-11) Student barely makes any argument for their choice.	(12-17) Student provides very limited evidence or argument for their choice.	(18-22) Student discusses this option and argues for it, but not with enough insight to gain a first.	(23-30) Student makes a strong argument for this strategic growth option based on evidence from the case.

Macro:

Demographics: Nando's needs to carefully consider the demographics of their target market before making product developments. They need to ensure that these new products would appeal to their chosen target market.

Natural: Nando's needs to make environmental considerations, especially as they are selling chicken, they need to think about how their business could affect the environment.

Cultural: Nando's may decide to expand the menu to include dishes which are culturally specific to different target markets.

Macro **20 marks**	(0-7) Student barely mentions the macro-environment.	(8-11) Student provides a limited discussion of the macro-environment.	(12-14) Student provides a good discussion of the macro-environment but does not show enough insight to achieve a first.	(15-20) Student provides a strong and insightful discussion of the macro-environment, drawing on the points above, or their own points justified by theory and evidence.
Micro: **Competitors:** By offering new products, Nando's may be able to increase their competitiveness and compete with different types of brands. **Suppliers:** Suppliers may be a consideration here – would their existing suppliers be able to cater to these new products? **Customers:** What new products would appeal to their existing target market and how would Nando's find this out? They would need to do some form of market research, possibly in the form of a social media competition. They could ask customers to send in their ideas for new dishes for the chance to win a prize and have their dish on the menu. **The firm:** The new products would have to be aligned to the positioning and 'soul' of the brand.				
Micro **20 marks**	(0-7) Student barely mentions the micro-environment.	(8-11) Student provides a limited discussion of the micro-environment.	(12-14) Student provides a good discussion of the micro-environment but does not show enough insight to achieve a first.	(15-20) Student provides a strong and insightful discussion of the micro-environment, drawing on the points above, or their own points justified by theory and evidence.

STP and Branding: Nando's will need to be clear on their segmentation and targeting and ensure that their new product developments suit the existing target market. Students may also discuss the various segments of the SA market here, and which segments Nando's would appeal to (as well as how they can change their offering to best appeal to these segments). E.g. Skilled Strugglers, Black Diamonds, etc. The case discusses how the owners of Nando's want to maintain the 'soul' of the brand. They still need to maintain a relatively consistent positioning and brand identity, regardless of which alterations they are making to their strategy. They can discuss brand essence again here.				
STP and Branding **20 marks**	(0-7) Student barely mentions STP and branding.	(8-11) Student shows limited insight into the STP and branding considerations.	(12-14) Student shows good insight into the STP and Branding considerations but not enough to gain a first.	(15-20) Student shows great insight into the STP and branding considerations.
CRM: Nando's doesn't really have a CRM strategy currently. It may be wise for them to invest in one. Kauai, for example, has a loyalty card (which has now become a loyalty app), and so does Spur.				
CRM **10 marks**	(0-3) Student barely mentions CRM.	(4-5) Student provides a limited discussion of CRM.	(6-7) Student makes a good CRM suggestion for the brand but does not show enough insight to gain a first.	(8-10) Student discusses CRM and makes an insightful suggestion for the brand.

TOTAL: 100 marks

Appendix 9: Managerial Finance contact test

DEPARTMENT OF FINANCE AND TAX
MANAGERIAL FINANCE (FTX1005F)
CLASS TEST 1

Time: 1 ½ hours	28 March 2018	Marks: 75

(Reading time of 7 minutes is allowed)

Instructions to candidates: ***(Please read the instructions carefully).***

1. Please do not open this paper until instructed to do so.

2. Record your **TUTORIAL GROUP NUMBER** in the top **LEFT** hand corner of each the answer books.

3. **PLEASE ANSWER QUESTION 1 IN BOOK 1 and QUESTION 2 IN BOOK 2.** Blue or black pen must be used for written answers. Answers must be written on the right hand side of the answer books.

4. **Show and reference *(number)* all your workings clearly on the left-hand side of the answer books**. Workings may be done in pencil.

5. No student is to leave the TEST venue during the **FIRST HOUR OR THE LAST 20 MINUTES** of the test.

6. Ignore Value Added Taxation *(VAT)* in all questions.

7. **No questions will be answered by the invigilators during the examination. Make whatever assumptions you deem appropriate and clearly state these in your answer. Any reasonable assumption will be considered.**

	Topic	Marks	Minutes
Question 1	True / False questions, Accounting equation and General Ledger and Sources of Finance	35	42
Question 2	Adjustments and Annual financial statements	40	48
		75	**90**

This class test paper consists of 6 pages.

QUESTION 1	(35 MARKS: 42 MINUTES)

This question consists of four *(4)* independent parts A, B, C and D.

PART A	(9 MARKS: 11 MINUTES)

Indicate whether the following statements are True or False. If the statement is False please provide a reason for your decision.

1. The main objective of Accounting and Annual reports are to provide decision useful information to a wide range of users.

2. Expense accounts increase on the credit side.

3. The two Fundamental Accounting Characteristics are Timeliness and Faithful Representation.

4. The Accrual Basis of Accounting states that financial transactions should only be recorded when cash is received or paid.

5. Income received in advance is a current asset.

PART B	(11 MARKS: 13 MINUTES)

Analyse the following transactions of Elliot Limited according to the Accounting equation below. You have to clearly show if the element increases (+), decreases (-) or no change (0).

Transactions: March 2018

1. Issued 10 000 ordinary shares at R2 each to shareholders.

2. Issued a cheque of R30 000 as a deposit on the purchase of land and buildings valued at R300 000. The balance was borrowed from Waller Bank at prime interest rate of 10.25 % per annum.

4. Bought inventory valued at R80 000 on credit from Bassier Wholesalers. Bassier Wholesalers offered a trade discount of 10 %.

10. Half of the inventory purchased on 4 March 2018 was sold for cash at a mark-up on cost of 100 %.

Example: Paid wages by cheque, R500.

	Assets	=	Equity	+	Liabilities
Example	***-500***		***-500***		***0***

PART C	(5 MARKS: 6 MINUTES)

Given below is the General ledger Bank account of Hamish Hardie (HH) Limited. Study the account and answer the questions below.

General Ledger of HH Limited

Bank Account

Date	Name of other account	Fol.	Amount	Date	Name of other account	Fol.	Amount
2018				**2018**			
Feb. 01	Balance	B/D	30 000	Feb. 25	Inventory	CPJ	20 000
15	**(a)**		40 000	26	**(b)**	CPJ	140 000
17	Share Capital		10 000				
20	Debtors	**(c)**	60 000				
			160 000				**160 000**

YOU ARE REQUIRED TO:

1. To provide the missing information denoted by **(a), (b) and (c)** in the Bank account. Your answer in **(a)** and **(b)** should not be the same as the accounts used above.

(3 marks)

2. What would the balance of the bank account be at 28 February 2018? Please indicate the balance amount and whether it would be a debit or credit balance.

(2 marks)

PART D	(10 MARKS: 12 MINUTES)

1. What are the three main goals in taking a company public by means of an Initial Public Offer (IPO)?

(3 marks)

2. In an IPO the underwriter drives the entire process *(which includes documentation and marketing)* but also ensures that _____. What is the other primary function of the underwriter?

(1 mark)

3. In an IPO what is the process to check the integrity ad validity of the information.

(1 mark)

4. a. Why do some investors prefer to invest in bonds **(1 mark)**

b. Name one category of investors who would prefer bonds **(1 mark)**

5. Sipho Limited has just completed a success IPO. The firm has Total Assets *(including cash from the IPO)* of R74.4 million and Total Liabilities of R32.2m. The Shareholders *(owners)* equity before the IPO was R6.2m. The shares were issued to the public at R8 per share.

How many new shares were issued?

(3 marks)

QUESTION 2	(40 MARKS: 48 MINUTES)

The following **Pre-Adjustment Trial Balance** was extracted from the accounting records of Nxumalo Ltd at
30 June 2017, the end of the company's financial year end:

		Dr	Cr
Statement of financial position accounts		**R**	**R**
Share capital *(Ordinary (Class A) shares of R0.50 each)*			200 000
Retained earnings (*1 July 2016) Opening balance*			20 000
Land at cost		75 000	
Buildings at cost		100 000	
Office equipment and fittings at cost		25 000	
Vehicles at cost		50 000	
Fixed deposit *(8 % per annum): 36 months*		30 000	
Accumulated depreciation: Buildings			30 000
Accumulated depreciation: Office equipment and fittings			15 000
Accumulated depreciation: Vehicles			20 000
Inventory		20 000	
Accounts receivable *(Debtors)*		15 000	
Prepaid expenses		500	
Cash and cash equivalents		5 000	
Accounts payable *(Creditors)*			12 500
Income received in advance			1 000
Sales income			150 000
Cost of sales expense		100 000	
Rent income			30 000
Salaries and wages expense		40 000	
Telephone and water and electricity expense		7 000	

General operating expenses		9 000	
Bad debts expense		2 000	
		R478 500	**R478 500**

The following additional information below has not been recorded at 30 June 2017.

Additional information:

1. Depreciation must be calculated as follows:

- Land is not depreciated;
- Buildings at 10 % per annum on the diminishing balance method;
- Office equipment and fittings at 15 % per annum on the straight line method;
- Vehicles at 20 % per annum on the straight line method.

2. A part of the building was let to a doctor, Melissa Catin, at R3 000 per month. At 30 June 2017 she had not paid the last 2 months rent.

3. A debtor, Simran Charania, who owed the company R100 was declared insolvent. Her estate paid a final 50 cents in the rand. This has been recorded. The balance must be written off as bad.

4. At 30 June 2017 an invoice was received from a supplier, Deswin Frans Services, who provided a window cleaning service to the firm. The amount was R1 000 and is normally recorded as a general operating expense.

YOU ARE REQUIRED TO:

1. Prepare General Journal entries for the adjustments 1 to 4.
(General journal narrations and Dates are not required.)

(12 marks)

2. Prepare the Statement of Comprehensive Income *(after all the additional information had been taken into account)* for the year ended 30 June 2017.

(11 marks)

3. The Statement of Financial Position as at 30 June 2017.

(17 marks)

Bonus questions

1. What is the current share price of Tigerbrands and Steinhoff.

2. Name any one of the five countries that make up BRICS.

3. What is the current risk free rate *(interest rate)* of Government bonds?

4. How many class a shares did Nxumalo Ltd issue?

Appendix 10: Managerial Finance contact test marking rubric

Managerial Finance (FTX1005F)
Class test 1
28 March 2018
Suggested solutions

QUESTION 1	(35 MARKS: 42 MINUTES)

This question consists of four (4) independent parts A, B, C and D.

PART A	(9 MARKS: 11 MINUTES)

Indicate whether the following statements are True or False. If the statement is False please provide a reason for your decision.

1. The main objective of Accounting and Annual reports are to provide decision useful information to a wide range of users.

True

2. Expense accounts increase on the credit side.

False: Expenses increase on the debit side / expenses decrease on the credit side

3. The two Fundamental Accounting Characteristics are Timeliness and Faithful Representation.

False: Relevance and Faithful Representation.

4. The Accrual Basis of Accounting states that financial transactions should only be recorded when cash is received or paid

False: Transactions are recorded when transactions occur irrespective whether cash is received or not.

5. Income received in advance is a current asset.

False: It is a current liability

PART B	(11 MARKS: 13 MINUTES)

Example: Paid wages by cheque, R500.

	Assets	=	Equity	+	Liabilities
Example	*-500*		*-500*		*0*
1	+20 000		+20 000		0
	(1)		(1)		
2	-30 000 (1)				
	+300 000 (1)		0		+270 000 (1)
4.	+72 000 (1)		0		+72 000 (1)
10.	+72 000 (1)		+72 000 (1)		
	-36 000 (1)		-36 000 (1)		0

PART C	(5 MARKS: 6 MINUTES)

Given below is the Bank account of Hamish Hardie (HH) Limited. Study the account and answer the questions below.

General Ledger of HH Limited
Bank Account

Date	Name of other account	Fol.	Amount	Date	Name of other account	Fol.	Amount
2018				**2018**			
Feb. 01	Balance	B/D	30 000	Feb. 25	Inventory	CPJ	20 000
15	**(a)**		40 000	26	**(b)**	CPJ	140 000
17	Share Capital		10 000				
20	Debtors	**(c)**	60 000				
			160 000				**160 000**

YOU ARE REQUIRED TO:

1. To provide the missing information denoted by **(a), (b) and (c)** in the Bank account. Your answer in (a) and (b) should not be the same as the accounts given above.

(3 marks)

Answer

(a) Sales income, Rent income, Interest income
(b) Assets purchased such as Equipment, Expense ect
(c) Cash Receipts Journal (CRJ)

2. What would the balance of the bank account be at 28 February 2018? Please indicate the balance amount and whether it would be a debit or credit balance.

(2 marks)

Answer

Bank account balance – R20 000 **(1)** Credit balance = Bank overdraft **(1)**

PART D	(10 MARKS: 12 MINUTES)

1. What are the three main goals in taking a company public by means of an Initial Public Offer (IPO)? **(3 marks)**

Answer:
Obtain capital for expansion (notes) **(1)**
A return for the original founders (notes) **(1)**
Ensure succession because shares will be owned by other outsiders (from video shown in class) **(1)**

2. In an IPO the underwriter drives the entire process (which includes documentation and marketing) but also ensures that _____. What is the other primary function of the underwriter? **(1 mark)**

Answer:
Guarantees that the company will raise the capital – they will take up shares if the public does not buy them **(1)**

3. In an IPO what is the process to check the integrity ad validity of the information **(1 mark)**

Answer:
Due diligence **(1)** *– must give the precise terminology.*

4. a. Why do some investors prefer to invest in bonds **(1 mark)**
   b. Name one category of investors who would prefer bonds **(1 mark)**

Answer:
a. bonds pay a fixed rate of interest and provide income **(1)**
b. pension funds or retired person **(1)**

5. Sipho Limited has just completed a success IPO. The firm has total assets (including cash from the IPO) of R74.4 million and total liabilities of R32.2m. The shareholders (owners) equity before the IPO was R6.2m. The shares were issued to the public at R8 per share. How many new shares were issued. **(3 marks)**

Answer:
Shareholders equity = Total assets R74.4m – Total liabilities R32.2m = R42.2m **(1)**
New equity = R42.2m – R6.2m = R36m **(1)**
No of shares = R36m ÷ R8 = 4.5 million **(1)**

QUESTION 2	(40 MARKS: 48 MINUTES)

1. General journal of

		Name of accounts		Dr	Cr		
1.	Dr	Depreciation expense	(½)	7 000		(½)	
	Cr	Accumulated depreciation: buildings	(½)		7 000		
		(R100 000 - 30 000) (½) x 10 % (½)					**2½**
	Dr	Depreciation expense	(½)	3 750		(½)	
	Cr	Accumulated depreciation: office	(½)		3 750		
		(R25 000 x 15 %) (½)					**2**
	Dr	Depreciation expense	(½)	10 000		(½)	
	Cr	Accumulated depreciation:	(½)		10 000		
		(R50 000 x 20 %) (½)					**2**
2	Dr	Accrued income	(½)	6 000		(½)	
	Cr	Rent income	(½)		6 000		
		(R30 000 / 10) x 2 (½)					**2**
3.	Dr	Bad debts expense	(½)	50		(½)	
	Cr	Accounts receivable	(½)		50		
		R100 x 50/100 (½)					**2**
4.	Dr	General operating expense	(½)	1 000		(½)	
	Cr	Accrued expenses	(½)		1 000		**1½**

(12 marks)

2. Statement of Comprehensive Income FOR THE YEAR ENDED 30 June 2017 (½)

Sales income			150 000	**(1)**
Less: Cost of sales expense			100 000	**(1)**
Gross profit			50 000	**(1)**
Add: Other income				
Rent income (R30 000 + 6 000)			36 000	**(1)**
			86 000	
Less: Operating expenses			**79 800**	
Depreciation expense: Buildings		7 000		**(1)**
Office		3 750		**(1)**
Vehicles		10 000		**(1)**
Bad debts expense *(R2 000 + 50)*		2 050		**(1)**
General operating expenses *(R9 000 + 1 000)*		10 000		**(1)**
Salaries and wages expense		40 000		**(½)**
Telephone		7 000		**(½)**
Net profit transferred to Retained earnings			**6 200**	**(1m)**

(11 marks)

3. Statement of Financial Position AS AT 30 June 2017 (½)

ASSETS					
Non-current assets		***Cost***	***Accumulated depreciation***	***Carrying value***	
Land		75 000		75 000	**(1)**
Buildings		100 000 (½)	37 000 **(1)** (30 000 + 7 000)	63 000 (½)	**(2)**
Office equipment and fittings		25 000 (½)	18 750 **(1)** (15 000 + 3 750	6 250 (½)	**(2)**
Vehicles		50 000 (½)	30 000 **(1)** (20 000 + 10 000)	20 000 (½)	**(2)**
				164 250	
Fixed deposit				**30 000**	**(1)**
Current assets				**46 450**	
Inventory		20 000			**(½)**
Accounts receivable (R15 000 - R50)		14 950			**(1)**
Accrued income (R30 000 X 2/10)		6 000			**(1)**
Prepaid expenses		500			**(1)**
Cash and cash equivalents		5 000			**(1)**
				240 700	
EQUITY AND LIABILITIES					
Equity and reserves					
Share capital				200 000	**(1)**
Retained earnings (R20 000 (½) + 6 200 (½m))				26 200	
				226 200	
Non-current liabilities					
Current liabilities				**14 500**	
Accounts payable		12 500			**(½)**
Income received in advance		1 000			**(1)**
Accrued expense		1 000			**(1)**
				240 700	

(17 marks)

Bonus question

1. Tigerbrands R376.51 Steinhoff R3.20 ***(approximately R10 range)***
2. Russia, China, South Africa, Brazil and India
3. 6.75 % to 9 %
4. R200 000 / 05 = 400 000 class A shares

1 mark each
Total 5 marks

Appendix 11: Managerial Finance online test

DEPARTMENT OF FINANCE AND TAX
FTX1005R
Managerial Finance
Class Test 2
25 October 2016

18:00 – 19:08
50 Marks

Name:

Student number:

DEPARTMENT OF FINANCE AND TAX
FTX1005R
Managerial Finance
Class Test 2
25 October 2016

18:00 – 19:08
50 Marks

Instructions to students: (Please read the instructions carefully).

1. This test paper comprises of 9 pages, including the cover sheet, Appendix A, formula sheet and Appendix B extracts from the 2016 annual reports of Pick n Pay.
2. Students are allowed 8 minutes reading time.
3. Ignore Value Added Taxation (VAT) in all questions.
4. Show and reference (number) all your workings clearly.
5. Make whatever assumptions you deem appropriate and clearly state these in your answer. Any reasonable assumption will be considered.

	Topic	Marks	Suggested time
			(minutes)
Question 1	Yearend Adjustments and Annual Financial Statements	30	36
Question 2	Financial analysis	15	18
Question 3	Risk and Return	5	6
		50	**60**

Question 1	(30 Marks : 36 Minutes)

The following Pre-adjustment Trial balance was extracted from the accounting records of Mpofu Ltd at 28 February 2016.

		Debit	Credit
		R	R
Statement of financial position accounts			
Share Capital			1 000 000
Retained earnings			286 000
Mortgage loan (10 % per annum)			500 000
Land		700 000	
Buildings		800 000	
Office equipment		200 000	
Motor vehicles		300 000	
Inventory		45 000	
Debtors		70 000	
Prepaid expense		5 000	
Cash and cash equivalents		20 000	
Creditors			120 000
Income statement accounts			
Sales income			2 400 000
Cost of sales expense		1 600 000	
Rent income			110 000
Salaries and wages expense		270 000	
Telephone expense		44 000	
Rates and taxes expense		12 000	
Other operating expenses		350 000	
		R4 416 000	**R4 416 000**

The following additional information must be recorded

i) Rates and taxes amount to 2 cents in the Rand on the land. The difference between the amount paid and the amount due must be brought into account.

ii) A closer scrutiny of the debtors' ledger revealed that a debtor, A. Slowpay, will be unable to repay the amount owing. According to the accounting records he owed R500 and it has been decided to write off his account as irrecoverable.

iii) The firm decided to adopt the following depreciation policies:

Land	is not depreciated.
Buildings	5 % per annum on straight-line method
Office equipment	10 % per annum on straight-line method
Motor vehicles	20 % per annum on straight-line method

iv) The tenant who has been letting the property for 5 years paid the rent only for 11 months.

You are required to:

1.1. Prepare general journal entries for adjustments (i), (ii), (iii) and (iv).
General journal narrations are not required.

(12 marks)

Start writing here:

1.2. Show how the Rent income account will appear in the general ledger after the adjustment (iv) above had been recorded and posted.

(2 marks)

Start writing here:

1.3. Assuming that the company made a **Net Profit of R121 500** after adjusting the income statement items with the additional information for the year ended 28 February 2016, prepare the Statement of Financial Position as at 28 February 2016.

Please note you are NOT required to prepare a Statement of Comprehensive Income for the year ended 28 February 2016.

(16 marks)

Start writing here:

Bonus question

Calculate the total amount of the dividend if the Mpofu Ltd declared a dividend of 50 cents per share. At 28 February 2016 the firm's Class A *(ordinary)* shares were trading at R2.50 per share.

(1 mark)

Start writing here:

QUESTION 2	(15 MARKS : 18 MINUTES)

The extracts from the annual reports of Pick n Pay Ltd for the year ended 28 February 2016 are presented to you in **Annexure B.**

Please note the following:

- **Assume that all the sales are on credit**
- **Use only stores group figures and not the holdings group figures**

You are required to:

2.1 Calculate two (2) Liquidity ratios of Pick n Pay Ltd for the year ended 2016.

(6 marks)

Start writing here:

2.2 Calculate the use of debt by Pick n Pay in 2016 to finance its assets.
Briefly comment of your findings.

(3 marks)

Start writing here:

2.3 Calculate Pick n Pay's Ltd Gross Profit on Sales (Turnover) and Net Profit on Sales (Turnover) percentages only for 2016.
Provide one reason why the two financial ratios would be different.

(6 marks)

Start writing here:

QUESTION 3	(5 MARKS : 6 MINUTES)

The following information was extracted the records of United Equity Analysts:

	Company Van Tonder	**Company Tiro**	**Company Mamputa**
Expected return	8.9 % *(0.089)*	7.3 % *(0.073)*	9.3 % *(0.093)*
Standard deviation	0.09648	0.02304	0.034

Coefficient of variation *(CV)*	?	?	?

You are required to:

3.1 Identify which company you would invest in.

(1 mark)

Start writing here:

3.2 You are required to explain with calculations and reasons why you chose the company in 3.1 above.

(4 marks)

Start writing here:

Test Total: 50 marks

DEPARTMENT OF FINANCE AND TAX
FTX1005R
Managerial Finance
Class Test 2
25 October 2016

18:00 – 19:08
50 Marks

Annexure A

Formula Sheet - Financial ratios

1.	Acid test ratio		Current assets – inventory
			Current liabilities
2.	Current ratio		Current assets
			Current liabilities
3.	Inventory days on hand		Inventory x 365
			Cost of sales expense
4.	Debtors collection period		Accounts receivable x 365
			Credit sales
5.	Debt ratio		Total debt x 100
			Total assets *(at carrying value)*
6.	Price earnings *(PE)* ratio		Market price per share *(MPS)*
			Earnings per share *(EPS)*
7.	Creditors payment period		Creditors x 365

			Cost of sales expense
8.	Gross profit on sales		Gross profit x 100
			Sales *(Turnover)*
9.	Return on equity (*ROE)*		Net profit after tax x 100
			Total shareholders' equity *(interest)*
10.	Net profit on sales after tax		Net profit after tax x 100
			Sales *(Turnover)*

Annexure B

Extracts from the annual reports of Pick 'n Pay Group for the year ended 28 February 2016.

Pick n Pay Group annual financial statements

Statements of comprehensive income

for the period ended

		Pick n Pay Stores Group		Pick n Pay Holdings Group	
	Note	52 weeks 28 February 2016 Rm	Restated* 52 weeks 1 March 2015 Rm	52 weeks 28 February 2016 Rm	Restated* 52 weeks 1 March 2015 Rm
Revenue	2	**73 477.3**	67 783.1	**73 477.4**	67 783.1
Turnover	2	**72 445.1**	66 940.8	**72 445.1**	66 940.8
Cost of merchandise sold		**(59 474.8)**	(54 994.3)	**(59 474.8)**	(54 994.3)
Gross profit		**12 970.3**	11 946.5	**12 970.3**	11 946.5
Other trading income	2	**971.3**	782.9	**971.3**	782.9
Trading expenses		**(12 425.3)**	(11 489.3)	**(12 427.8)**	(11 490.8)
Employee costs	3	**(6 060.6)**	(5 672.9)	**(6 056.6)**	(5 653.9)
Occupancy		**(2 337.6)**	(2 047.6)	**(2 337.6)**	(2 047.6)
Operations		**(2 848.1)**	(2 618.8)	**(2 848.1)**	(2 618.8)
Merchandising and administration		**(1 179.0)**	(1 150.0)	**(1 185.5)**	(1 170.5)
Trading profit		**1 516.3**	1 240.1	**1 513.8**	1 238.6
(Loss)/profit on sale of property, plant and equipment		**(24.0)**	10.4	**(24.0)**	10.4
Impairment loss on intangible assets	9	**(8.6)**	—	**(8.6)**	—
Finance income	2	**60.9**	59.4	**61.0**	59.4
Finance costs	3	**(117.0)**	(119.0)	**(117.0)**	(119.0)
Share of associate's income	14	**45.9**	14.3	**45.9**	14.3
Profit before tax	3	**1 473.5**	1 205.2	**1 471.1**	1 203.7
Tax	6	**(408.1)**	(343.5)	**(408.1)**	(343.5)
Profit for the period		**1 065.4**	861.7	**1 063.0**	860.2

Appendix 12: Managerial Finance online test marking rubric

Managerial Finance (FTX1005R)
Class test 2
September 2016
Suggested solutions

QUESTION 1	**(30 MARKS : 36 MINUTES)**

1.1
General Journal of Mpofu Ltd – February 2016

		Name of accounts		**Dr**	**Cr**	
	Dr	Rates and taxes expense	**(½)**	2 000		
	Cr	Accrued expense	**(½)**		2 000	
		(R700 000 x 2 %) **(½)** - 12 000 **(½)**				**(2)**
	Dr	Bad debts expense	**(½)**	500		
	Cr	Debtors	**(½)**		500	**(½)**
						(1½)
	Dr	Depreciation expense	**(½)**	40 000		
	Cr	Accumulated depreciation: Buildings	**(½)**		40 000	**(½)**
		(R800 000 x 5 %) = R40 000 **(½)**				**(2)**
	Dr	Depreciation expense	**(½)**	20 000		

	Cr	Accumulated depreciation: Equipment	**(½)**		20 000	**(½)**
		(R200 000 x 10 %) = R20 000 **(½)**				**(2)**
	Dr	Depreciation expense		60 000		
	Cr	Accumulated depreciation: Motor Vehicles			60 000	**(½)**
		(R300 x 20 %) = R60 000 **(½)**				**(2)**
	Dr	Accrued income (income receivable)	**(½)**	10 000		**(½)**
	Cr	Rent income	**(½)**		10 000	
		R110 00 /11 = R10 000 **(½)**				**(2)**

(12 marks)

1.2

Rent income

				Feb 28	Balance	**(1)**	110 000
				28	Accrued income or income receivable **(1)**	**(1)**	10 000
					Balance		**120 000**

(3 marks)

1.3

Mpofu Ltd
Statement of Financial Position *(Balance sheet)* at 28 February 2016 (½)

ASSETS		**R**	
Non-current assets		**1 880 000**	**(1m)**
Property, plant and equipment at carrying value	1 880 000		
Investments: Fixed deposit			

Current assets		**149 500**	
Inventory	45 000		**(½)**
Debtors *(R70 000* **(½)** *– 500* **(½)***)*	69 500		
Prepaid expenses	5 000		**(1)**
Accrued income	10 000		**(1m)**
Bank	20 000		**(½)**
TOTAL ASSETS		**R2 029 500**	
EQUITY AND LIABILITIES			
Equity			
Share capital and reserves		**1 407 500**	
Share capital	*1 000 000*		**(1)**
Retained earnings (R286 000 **(1)** + 121 500 **(1m)**)	*407 500*		
Non-current liabilities			
Mortgage loan		**500 000**	**(½)**
Current liabilities		**122 000**	
Creditors	120 000		**(½)**
Accrued expenses	2 000		**(1m)**
TOTAL EQUITY AND LIABILITIES		**R2 029 500**	

Non-current assets

	Cost	**Less**	**Accumulated Depreciation**	**Carrying value**	
Land	700 000			700 000	**(½)**
Buildings	800 000		40 000 **(½)**	760 000 **(½)**	
Equipment	200 000		20 000 **(½)**	180 000 **(½)**	
Vehicles	300 000		60 000 **(½)**	240 000 **(½)**	
	2 000 000 **(½)**		120 000	**R1 880 000**	**(4)**

(16 marks)

- **Minus ½ mark for incorrect heading: (maximum ½)**
- **Minus ½ mark for each foreign item: (maximum ½)**

Bonus question

Total dividends				
Number of shares in issue	R1 000 000 / 2.5	400 000 x 0.5	=	R200 000

(1 mark)

NOT REQUIRED BY THE QUESTION

Mpofu Ltd
Income statement for the year ended 28 February 2016 (½)

Sales income		2 400 000	**(½)**
Less: Cost of sales expense		-1 600 000	**(½)**
Gross profit		800 000	**(½m)**
Add: Other income		120 000	
Rent income (R110 000 **(½)**+ 10 000 **(½)**	120 000		
		920 000	
Less Operating expenses		**-798 500**	**(½)**
Salaries and wages expense	270 000		**(1)**
Telephone expense	44 000		**(½)**
Rates and taxes expense (R12 000 **(½)** + 2 000 **(½)**)	14 000		
Bad debts expense	500		**(½)**
Depreciation expense (R40 000 **(½)**+ 20 000 **(½)**+ 60 000 **(½)**)	120 000		
Other operating expenses	350 000		**(½)**

Net Profit for the year transferred to the RETAINED EARNINGS		**R121 500**	**(½m)**

(9 marks)

- **Minus ½ mark for incorrect heading: (maximum ½)**
- **Minus ½ mark for each foreign item: (maximum ½)**

QUESTION 2	(15 MARKS : 18 MINUTES)

		2016		2015
2.1	**Current ratio**			
	Current assets	R9 467.1m	**(½)**	R8 616.8m
	Current liabilities	11 335.0m	**(½)**	9 931.0m
		= 0.835 : 1	**(1)**	= 0.867 : 1
	Acid test ratio			
	Current assets - inventory	R9 467.1m **(½)** – 5 152 m **(½)**		R8 616.8m - 4 654.5m
	Current liabilities	11 335.0m	**(½)**	9 931.0m
		= 0.3808 : 1	**(1)**	= 0.3989 : 1

The firm's liquidity is not in line with the norms of 2 : 1 and 1 : 1 **(½)** required but given the cash nature of Pick n Pay's business this not cause for concern **(1)**

Alternative: The firm has a current ratio and quick ratio of less than 1 (or 1:1) **(½)** and may struggle to meet its short-term obligations. **(1)**

(6 marks)

2.2	**Debt ratio**			
	Total debt *(NCL + CL)* x 100	R12 667.1m *(R1 332.1 m+ 11 335m)*	**(1)**	R11 562.3 *(R1 631.3 m + 9 931.0m)*
	Total assets *(NCA +CA)*	R16 584.9 *(R7 117.8m + 9 467.1m)*	**(1)**	R14 824.1 *(R6 207.3 + 8 616.8m)*
		= 76.37 %	**(½)**	= 77.99 %

(3 marks)

2.3	**Gross profit**			
	Gross profit x 100	R12 970. 3 m x 100	**(1)**	R11 946.5m x 100
	Sales	R72 445.1 m	**(1)**	R66 940.8 m

		= 17.90 %	**(½)**	= 17.84 %

2.3	**Net profit on sales**			
	Net profit after tax x 100	R1 065.4 m x 100	**(1)**	R861.7m x 100
	Sales	R72 445.1 m	**(1)**	R66 940.8 m
		= 1.4706 %	**(½)**	= 1.28 %

The decrease in the net profit after tax could be caused by operating expenses, other income and expenses and tax. **(1)**
Students are required to identify only one of the above factors.

(6 marks)

QUESTION 3	(5 MARKS : 6 MINUTES)

3.1 Company Mamputa or Company Tiro

(1 mark)

3.2

	Company Van Tonder	Company Tiro	Company Mamputa
Expected return	8.9 % *(0.089)*	7.3 % *(0.073)*	9.3 % *(0.093)*
Standard deviation	0.09648	0.02304	0.034
Coefficient of variation *(CV)*	**?**	**?**	**?**
CV = σ	0.09648	0.02304	0.034
Er	0.089	0.073	0.093
Coefficient of variation *(CV)*	= 1.08408	= 0.31566	=0.36559
	(1)	**(1)**	**(1)**

Based on the information provided Company Mamputa gives the highest expected return is 9.3 % **(½)** and its Coefficient of Variation *(CV)* is 0.36559 which states that for every 1 percent of return the firm has 0.36559 % of risk **(½)** which is better than that of Company Van Tonder

Alternative: Based on the information provided, Company Tiro gives the best risk-adjusted return **(½)** and has a Coefficient of Variation (CV) of 0.31566 which states that for every 1 percent of return the firm has 0.31566% of risk **(½)**

(4 marks)

Appendix 13: Ethics clearance letter

EDNREC20180204

21 February 2018

SCHOOL OF EDUCATION

Dr Carolyn McKinney
Associate Professor

University of Cape Town, Private Bag X3, Rondebosch, 7701
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Ms Lara Karassellos
B.Ed (Honours)
Programme
University of Cape
Town

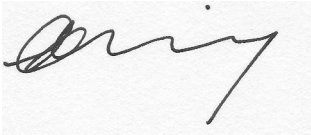
Dear Ms Karassellos

Re: Ethical Clearance for Research Project

I am pleased to inform you that ethical clearance has been granted by the School of Education Ethics Review Committee of the Faculty of Humanities for your M.Ed research project entitled: 'Does subject matter? A comparative study of framing and classification in online and contact courses and its implications for student assessments'.

I wish you all the best with

your study. Yours sincerely,



A/Prof Carolyn McKinney
Chair – School of Eduction Research Ethics Committee

Appendix 14: Convener consent form

Course Convener Information Sheet

Dear [Course Convener Name],

Does subject matter? A comparative study of framing and classification in online and contact courses and its implications for student assessments.

I am a researcher completing my Masters in Education, specialising in Higher Education Studies, through the University of Cape Town. I would like to ask your permission to carry out research in some of your lectures and tutorials.

The aim of this research project is to use Basil Bernstein's concepts of 'framing' and 'classification' as a framework to describe how different courses are taught in both online and contact mode, on the Postgraduate Diploma in Management, specialising in Marketing. Five elements will be analysed in both the online and contact courses – sequencing, pacing, selection (of content to be studied), evaluative criteria, and hierarchical rules (regarding how teacher and students interact). These aspects of the course will be studied in conjunction with student assessments. Some courses require students to submit assessments that are strongly defined – i.e. there is only one right answer. These courses are often calculation-based. Others require a more integrated approach (essay-based courses, for example) where there is no single right or wrong answer, but students are evaluated on the relative strength or weakness of their argument.

The aim of this research is not to evaluate or critique teacher performance, but rather to explore how subject matter is taught in different learning environments. While many researchers have compared online and contact teaching, few have considered the impact of subject matter in these different learning environments.

Data collection will take place in the first semester of 2018. I hope to sit in on a few of the lectures and a few of the tutorials and carry out my observation by taking notes. I would also like to look at a few student submissions. The exact duration of the data collection can be determined in consultation with you, but it is likely to only span one section or module of the course. We can also discuss whether you would be open to an informal interview regarding the course.

Participation is voluntary and the confidentiality of the university, the students, and the teachers, is guaranteed. The university and the programme will be given a pseudonym, and no student or teacher names or demographic information will be included in the study. You may withdraw permission for conducting the research at any time.

Please fill in the slip below to indicate your consent for the research. You are welcome to ask any questions regarding the research by telephone or email: Lara Karassellos, larakarassellos@gmail.com or 072 697 1202.

Kind regards,

Lara Karassellos

Does subject matter? A comparative study of framing and classification in online and contact courses and its implications for student assessments.

Course Convener Consent Form

Name:

Signature:

Date:

I consent to:	**Yes**	**No**
1. Being observed in the lecture/tutorial		
2. Assisting with access to student submissions		
3. Being interviewed (if necessary)		

I understand that my participation is voluntary and that confidentiality will be maintained. I can withdraw my participation at any time.

Appendix 15: Student consent form

Student Consent Form

Dear Students,

Does subject matter? A comparative study of framing and classification in online and contact courses and its implications for student assessments.

I am a researcher completing my Masters in Education through the University of Cape Town. As part of this research I will be observing a few of the lectures for this course. I will be investigating the course content, how it is delivered and how it is assessed and what impact this has on student assessments. This will be a comparative study looking at the differences in teaching and learning between online and contact versions of the same courses. This research will also include the analysis of student submissions (assignments, tests, and exams) and I would like to request access to your submissions.

Please note that no student names, nor student demographic information, will be included in the study. This research is completely anonymous. The university and the programme will also be given a pseudonym.

You are welcome to ask any questions regarding the research, or contact me if you have any issues with the research, by telephone or email: Lara Karassellos, larakarassellos@gmail.com or 072 697 1202.

Participation in this research is completely voluntary and can be withdrawn at any time. If you are comfortable with taking part in this research please sign this consent form.

Kind regards,

Lara Karassellos

Appendix 16: Email from Managerial Finance contact lecturer

Date: 7 April 2018 at 20:09
Subject: Re: Masters Dissertation Research
To: Lara Karassellos <lara.karassellos@getsmarter.com>

Good evening Lara

You are welcome. Yes, I would like to be as transparent as possible and provide students with a guide as to how we mark. They do get their scripts back in the tutorials to determine if we have been fair in the marking process *(students are allocated 10 to 15 minutes to scrutinise their scripts and they have to bring a copy of the solution ....aai budget problems)*. The same cannot be said of examinations but they can request a copy of their examination script some time after the final results have been released. Class test 2 is on 9 May 2018 so I would like you to mark.

Appendix 17: Comparison of online courses (detailed)

Table 9.1: Selection

	MANAGERIAL FINANCE		INTRODUCTION TO MARKETING	
ONLINE COURSES	ONLINE course content	ONLINE assessment	ONLINE course content	ONLINE assessment
SELECTION	F+	F++	F+	F+

In both the Introduction to Marketing and Managerial Finance online courses, there is strong framing over selection, as the students have little opportunity to select their own theory or examples, with a few exceptions.

For the most part, the facilitator on the Introduction to Marketing online course has decided which content to cover and which examples to use in the modules. There are a few instances in which students are prompted to select their own practical examples, such as in the read & engage activities, and in the class discussions, although these activities are not assessed and students are not provided with feedback on their thoughts.

The content of the Managerial Finance course is clearly established, and there is little room for students to participate in selection. Given the nature of the content itself, there is often only one right answer (e.g. a calculation), which further constrains students' ability to select.The class discussion in Thread 10, however, is an instance of weakened framing over selection as students have the ability to choose whichever accounting software they recommend and discuss it.

Table 9.2: Sequence

	MANAGERIAL FINANCE		INTRODUCTION TO MARKETING	
ONLINE COURSES	ONLINE course content	ONLINE assessment	ONLINE course content	ONLINE assessment
SEQUENCE	F+	F+	F+	F+

Both online courses allow for clear reference to sequencing. The structure of the online module presents a clear learning path. Learning activities are broken down into units, and learning activities within those units are numbered, suggesting the order in which students should access those various

learning activities. Students, however, have the power to access the learning activities in whichever sequence they choose, which suggests weaker framing over sequence. So while a clear sequence is recommended, it cannot be enforced, given the nature of the online course and students' relative autonomy, thus explaining the F+ code.

In both course different strategies are used to strengthen framing over sequence.

In the Introduction to Marketing online course there are constant references to previous sections of the course. In the videos, for example, the facilitator will often refer to case studies used previously in the course, or to content covered in previous modules. This strategy could help orient students within the course.

In the Managerial Finance online course, on the other hand, little reference is made to previous content and other strategies are used in this course to emphasize sequence. The readings have clear headings for each section, for example. In one of the videos the facilitator makes a clear distinction between each method of depreciation discussed. The text appearing on screen as she speaks also assists with making this sequence explicit. It is also clear when she begins the re-cap of the video at the end. In another video the facilitator goes through each question in the lecture example step-by-step. Each question also appears in text on the screen as she speaks, helping to make this sequence through the questions explicit.

Table 9.3: Pace

	MANAGERIAL FINANCE		INTRODUCTION TO MARKETING	
ONLINE COURSES	ONLINE course content	ONLINE assessment	ONLINE course content	ONLINE assessment
PACE	F+	F++	F+	F+

Given the nature of the online courses, there is inherently weaker framing over pacing. This is because all new module content is released every week or every two weeks (depending on the structure of the course) in one go. Students could go through all the content on the very first day of the new module, they could stretch it out over the week, or they could even come back to it during later modules of the course. This means that, in general, there is weak framing over pacing.

The suggested learning time allocations in the learning path can assist students in planning their study time. These suggested learning time allocations are instances in which pacing is made explicit, although it is impossible to enforce these time allocations in reality – they are merely suggestions. So while strong framing over pacing is suggested in the structure of the course, there is no way this can be enforced in reality (similar to the case with sequencing discussed above).

Table 9.4: Evaluative Criteria

	MANAGERIAL FINANCE		INTRODUCTION TO MARKETING	
ONLINE COURSES	ONLINE course content	ONLINE assessment	ONLINE course content	ONLINE assessment
EVALUATIVE CRITERIA (IMPLICIT/EXPLICIT)	F+	F++	F+	F--
EVALUATIVE CRITERIA (STUDENT VS. LECTURER CONTROL)	F++	N/A	F++	N/A

In both the Introduction to Marketing and Managerial Finance online courses there is little explicit reference to evaluative criteria in the module content itself. While the facilitator on the Introduction to Marketing course does demonstrate in the videos how theory could be applied to case studies, it is never made explicit that this is the expectation for the assessments. In the lecture videos the facilitator on the Managerial Finance course makes some reference to assessments, and the types of questions or structure of questions in the assessments, although she does not always explicitly state the link to assessments.

While in both courses references to evaluative criteria are not often woven into the module content itself, both facilitators are far more explicit regarding evaluative criteria in the more informal environment of the class discussion forum.

The facilitator on the Introduction to Marketing course, for example, provides detailed feedback posts on the assessments on the class discussion forum. The facilitator also offers group project support sessions here. In one of the posts on the discussion forum the facilitator provides a thorough list of pointers on how to approach an upcoming assessment. She also provides guidance on assessments in the live tutorial by dedicating time at the beginning and end of the session to answer student questions.

In the Managerial Finance course, the facilitator is open regarding evaluative criteria on the class discussion forum. At times she provides examples of how certain types of questions would be asked in a test or exam setting. At other times she provides general guidance on assessment, as discussed previously.

Seeing as there are few explicit links to evaluative criteria in the actual module content of both online courses, one may consider whether practical guidance on the assessments should be formally incorporated into the learning path. While the live tutorials and class discussions are available to everyone, students may not think to go there when studying or revising for the assessments. While the discussion forum posts remain online and can be referred back to throughout the course, the live tutorial session recordings are not provided to students, and some students do not attend these sessions, so guidance provided there regarding the assessments may not be available to all students.

Given the nature of these online courses and the fact that most of the material is created before the course ever goes live, there is little space for flexibility within the actual module content itself. A lecturer in a contact course, on the other hand, can adjust their teaching style or focus based on regular student feedback throughout the course. The facilitators on the online courses only receive student feedback in the discussion forums and the live tutorials. This could explain why the emphasis on evaluative criteria is only really noticeable in these spaces. Students may feel more supported if the focus on evaluative criteria was present throughout the module content as well.

In both online courses framing over the second dimension of evaluative criteria (student vs. lecturer control) is strong as the facilitators are in control of setting the assessments and evaluating students.

Table 9.5: Hierarchical Rules

	MANAGERIAL FINANCE		INTRODUCTION TO MARKETING	
ONLINE COURSES	ONLINE course content	ONLINE assessment	ONLINE course content	ONLINE assessment
HIERARCHICAL RULES	F-	N/A	F-	N/A

In both the Introduction to Marketing and Managerial Finance online courses there are open lines of communication between the facilitators and students, given the nature of the discussion forums. Any student can post at any time, without requesting permission. In both courses the facilitators are diligent about responding to every student question, leading to a high level of student engagement. The nature of the communication is professional but not overly formal. The facilitators and students address each other by first names, for example, and this could create a sense of familiarity.The online learning environment contains few hierarchical elements, and the student has some agency in impacting various pedagogical elements of this environment (such as sequence and pace). The facilitators impose certain hierarchical elements to this inherently non-hierarchical learning environment.

Table 9.6: Classification

	MANAGERIAL FINANCE		INTRODUCTION TO MARKETING	
ONLINE COURSES	ONLINE course content	ONLINE assessment	ONLINE course content	ONLINE assessment
CLASSIFICATION (BETWEEN THEORETICAL KNOWLEDGE AND EXAMPLES)	C++	C++	C-	C+
CLASSIFICATION (BETWEEN DIFFERENT SECTIONS OF THE COURSE)	C++	C++	C-	C--

The online Managerial Finance course displays much stronger classification than the online Introduction to Marketing course.

As discussed previously, in the Introduction to Marketing online course, the facilitator draws on a number of examples throughout the module to show how the theory could be applied practically. The case studies used are often quite detailed.

In the online Managerial Finance course the content is kept primarily theoretical with few references to everyday, or field of practice examples.

When it comes to the boundaries between different sections of the course, the Managerial Finance course is quite clearly compartmentalised with little evidence of integration between various sections of the course. The Introduction to Marketing course, on the other hand, features integration between various sections of the course, especially in the assessment which positions the course content as one unified whole.

Appendix 18: Comparison of contact courses (detailed)

Table 10.1: Selection

	MANAGERIAL FINANCE		INTRODUCTION TO MARKETING	
CONTACT COURSES	CONTACT course content	CONTACT assessment	CONTACT course content	CONTACT assessment
SELECTION	F++	F++	F++	F+

In both the Introduction to Marketing and Managerial Finance contact lectures there is strong framing over selection. In both cases the lecturers exert more control over selection of theoretical concepts, as well as examples, than students do.

In the Introduction to Marketing lectures, for examples, there are a few instances where the lecturer will address a question to the class or ask for their examples or input but, for the most part, the content is selected by him.

It is a similar case in the Managerial Finance class. There are many student questions, but these are generally requests for clarification on the material being discussed, rather than suggestions of other topics to cover. While the lecturer will ask the class for their input at times, there is little room for students to select their own theoretical concepts or examples – the course itself is not very flexible in this regard.

In both courses there does not seem to be any push from students to cover other topics or use other examples, and there is not much drive from the lecturers either in getting students to participate more actively in selection.

Table 10.2: Sequence

	MANAGERIAL FINANCE		INTRODUCTION TO MARKETING	
CONTACT COURSES	CONTACT course content	CONTACT assessment	CONTACT course content	CONTACT assessment
SEQUENCE	F++	F+	F++	F+

When it comes to sequence, the Introduction to Marketing and Managerial Finance contact courses are similar in the sense that there is strong framing over sequencing. In other words, both lecturers exert control over the sequence of the course, with students having little or no control over this sequence.

Table 10.3: Pace

	MANAGERIAL FINANCE		INTRODUCTION TO MARKETING	
CONTACT COURSES	CONTACT course content	CONTACT assessment	CONTACT course content	CONTACT assessment
PACE	F-	F++	F++	F+

There is stronger framing over pacing in the Introduction to Marketing class, than there is in the Managerial Finance class.

In the Introduction to Marketing course the lecturer sets the pace of the class for the most part. The class takes on quite a typical lecture-style format. He presents content in a predefined sequence, and while there are some instances of student interaction, he definitely occupies the bulk of the talk time. There are also very few questions from the class, so he has more control over setting the pace.

In the Managerial Finance class the students exert more control over pace, as there are far more questions throughout the class than in the Introduction to Marketing class. These student questions impact the pace of the class and prolong certain sections that the lecturer had intended to cover in a shorter period of time. Answering questions does occupy a significant portion of the lectures for the lecturer. The first lecture, for example, ends abruptly and the lecturer cannot cover the lecture example he planned to cover in this lesson.

Table 10.4: Evaluative Criteria

	MANAGERIAL FINANCE		INTRODUCTION TO MARKETING	
CONTACT COURSES	CONTACT course content	CONTACT assessment	CONTACT course content	CONTACT assessment
EVALUATIVE CRITERIA (IMPLICIT/EXPLICIT)	F++	F++	F-	F+
EVALUATIVE CRITERIA (STUDENT VS. LECTURER CONTROL)	F+	N/A	F++	N/A

The Introduction to Marketing and Managerial Finance courses differ in terms of evaluative criteria. Evaluative criteria are made more explicit in the Managerial Finance course than they are in the Introduction to Marketing course.

The Introduction to Marketing lecturer makes very little reference to evaluative criteria in the lectures and the explanations of content are never linked to a particular assessment. While weakened classification between theoretical concepts and examples is emphasized in lectures, the lecturer never makes the explicit link to evaluative criteria. For the most part, the references to evaluative criteria are implicit, as mentioned above, in what the lecturer emphasizes in the class. This is quite different to the Managerial Finance lectures where the lecturer constantly refers to assessments and application throughout the classes, and these references to evaluative criteria are clear and specific.

While the Introduction to Marketing lecturer does not make many explicit references to evaluative criteria during the lectures themselves, he is more open and transparent about evaluative criteria if students approach him with questions one-on-one after class.

In both the contact courses the lecturers set the assessments and mark them. The Managerial Finance course does allow the students a more active role in the marking process as they are given an opportunity to go through their scripts with the marking rubric to pick up any errors, and have these resolved if necessary. In that sense the second dimension of framing over evaluative criteria (student vs. lecturer control) is weaker in the Managerial Finance course than in the Introduction to Marketing course.

Table 10.5: Hierarchical Rules

	MANAGERIAL FINANCE		INTRODUCTION TO MARKETING	
CONTACT COURSES	CONTACT course content	CONTACT assessment	CONTACT course content	CONTACT assessment
HIERARCHICAL RULES	F+	N/A	F++	N/A

The Introduction to Marketing and Managerial Finance courses differ in terms of hierarchical rules, with the Introduction to Marketing course displaying stronger framing over hierarchical rules than the Managerial Finance course.

The Introduction to Marketing classes take on a traditional lecture-style format. While the lecturer is friendly and open to student questions and contributions, and will happily stay after class to answer student questions, the nature of the lecture itself creates quite defined roles for lecturer and students, with little informal interaction. The lecturer does not refer to any of the students by name. The lecturer poses a few questions to the class at some points, but this is not a major feature of the class. For the most part he takes an active role in transmitting the content, with students remaining quite passive, and the hierarchy is therefore explicit.

The Managerial Finance classes, on the other hand, are less formal. Overall, the lecturer seems to have an informal relationship with his students. Like the Introduction to Marketing lecturer the Managerial Finance lecturer is always willing to answer student questions before and after class. Unlike the Introduction to Marketing lectures, the Managerial Finance lectures do not always display a typical lecture-style format. The classes are quite interactive, with students asking many questions throughout, and the lecturer posing many questions to the class, and often calling on students by name. Some students refer to him by his first name, which creates a sense of familiarity. The lecturer often takes on a jokey tone when addressing the class.Often students will call out questions, and there does not seem to be a formal process for raising questions in class. There is also not usually any formal greeting or dismissal of the class. The hierarchy in this context is therefore implicit.

Another interesting thing to note is the differences in attendance. The Introduction to Marketing classes experience very low attendance, with some classes only having a handful of students (4 or 5). The Managerial Finance classes, on the other hand, experience much higher attendance, with about 60-70 students in each class.

The spatial arrangement of the traditional lecture theatre is inherently hierarchical, and a F- code therefore would not accurately describe the hierarchical rules in this type of learning environment. The student-teacher relationship, however, can vary based on the level of formality present, which is evident in this case. The Managerial Finance lecturer masks the hierarchy, whereas the Introduction to Marketing lecturer makes this hierarchy explicit.

Table 10.6: Classification

	MANAGERIAL FINANCE		INTRODUCTION TO MARKETING	
CONTACT COURSES	CONTACT course content	CONTACT assessment	CONTACT course content	CONTACT assessment
CLASSIFICATION (BETWEEN THEORETICAL KNOWLEDGE AND EXAMPLES)	C-	C++	C-	C+
CLASSIFICATION (BETWEEN DIFFERENT SECTIONS OF THE COURSE)	C++	C++	C-	C-

The Introduction to Marketing and Managerial Finance contact courses are similar in the sense that they both employ weakened classification between theoretical concepts and examples.

As mentioned before, the Introduction to Marketing lecturer will often show how the concepts under study can be applied in real marketing settings (such as that of the vehicle market). He refers to actual brand names so that these examples are authentic.

Assessments in the marketing discipline are usually structured as case study questions. Students are presented with case studies (sometimes fictional, sometimes not), and are asked to apply their knowledge in creating a strategy or report to address the 'problem' in the case study. By their nature these assessments require integration between the theory and the case study/field of practice, hence the C+ code. A student simply repeating or discussing the theory in isolation would not address the question sufficiently. With this in mind, the lectures are likely to be helpful in preparing students for this kind of integration and weakened classification.

Similarly, in the Managerial Finance course, there are instances of weakened classification where there are references to practical examples – many that are relevant to them as students, or relevant to the university environment with which they are familiar.

The scenarios that the Managerial Finance lecturer works with in the lecture are fictional, but they are based on real world situations (the use of a fictional business with fictional expenses and income). It is important to remember that the subject itself does require reference to real world scenarios – this is the nature of the discipline. It is a subject which prepares students to work with real financial documents in the business world so there is a need to present the scenarios in this realistic way.

When it comes to assessments, however, a subject like Introduction to Marketing requires more integration between theory and examples than Managerial Finance, which is kept primarily theoretical.

The Introduction to Marketing course differs from the Managerial Finance course in that there is also weakened classification between the various sections of the course. There are a number of instances throughout the lecture where the lecturer refers to previous sections of the course and how they apply to the current section. This weakened classification and integration between various sections of the

course communicates something important about assessment. Creating an effective marketing strategy for a brand would involve the integration of various marketing components into one coherent and holistic strategy. A subject like Introduction to Marketing is less compartmentalised in terms of sections of the course, than a subject like Managerial Finance. By lecturing in this way, the Introduction to Marketing lecturer is emphasizing the integrated nature of the course. The Managerial Finance lectures on the other hand, are compartmentalised, which accurately reflects the assessments for the course which are also clearly compartmentalised.