

SAIDE Financial Planning Course Questionnaire

List all the staff types or functions related to this course (for example, educators, tutor coordinators, invigilators, moderators, lecturers, etc):

Personnel Function	Hourly rate or annual package

What are the approximate hourly rates (calculated from annual packages if necessary)?

Check the following assumptions and adjust them with reasons if necessary:

- For each hour or educator (moderator, invigilator, tutor) time there is one hour of administration time.
- Each full-time equivalent of academic time has 20% of time allocated to pure research.
- There is a 10% FTE for tutor coordination.

The remainder of this questionnaire has three main sections:	Questions
<ul style="list-style-type: none"> ➤ Teaching and Learning Strategies which include questions on <ul style="list-style-type: none"> • Contact strategies (including planned face-to-face sessions and individual consultation time) • Assessment activities; and • Independent study 	<p style="text-align: center;">Q1-13</p> <p style="text-align: center;">Q3-8</p> <p style="text-align: center;">Q9-14 Q15</p>
<ul style="list-style-type: none"> ➤ Course Design where we distinguish <ul style="list-style-type: none"> • General course design time from • Specialist design and production time for course materials (including printed, audio, video and computer-based materials) 	<p style="text-align: center;">Q16-18 Q18-21</p>
<ul style="list-style-type: none"> ➤ Other direct costs (like travel, technology or course graphic design) 	<p style="text-align: center;">Q22-24</p>

We have included detailed explanations, as well as sample responses to these sets of questions. This questionnaire is designed to be completed digitally, as then adequate space can be created for all responses. If it is to be used as a hard copy, we suggest that additional photocopies of these pages be made in advance:

- Page 4 - Contact Strategy questions 3 to 6;
- Page 11 - Assessment activity questions 7 to 12;
- Page 20 - Course material questions 17 to 21.

If it is used in digital form, the contents of these pages should be ‘copied and pasted’ into the document where appropriate.

TEACHING AND LEARNING STRATEGIES

To gather this information, we categorise the teaching and learning strategies of the course into three sections:

- **Contact** refers to all time spent in face-to-face sessions with a facilitator tutor or lecturer;
- **Assessment** refers to the activities designed to evaluate student learning or progress that demand facilitator and student involvement; and
- **Independent Study** refers to all student time spent in course related activities that do not involve tutors facilitators or lecturers and are not assessment related.

These distinctions are essentially arbitrary, but are designed to estimate student notional hours of learning (how many hours each student is expected to put in to successfully complete the course) and the resulting staff workload.

GENERAL QUESTIONS

1. Over how many weeks does the course run? (enter N/A if it is open-ended)

2. How many students are enrolled in the course?

CONTACT STRATEGIES

List all the different contact strategies for the course. For example, distinguish between workshops, lectures, tutorials or laboratory or practical session

Contact Strategy Types
A.
B.
C.
D.
E.

List as many contact strategies as you think have unique characteristics. If you have more than five types of contact strategy, simply increase the list. It is better to split similar contact strategies and describe them as distinct types than to try to describe exceptions or different variations with in one type. For example, you may describe one of your contact strategies as workshops and then realize that some workshops are intensive and held over a weekend, while others are short and held on one afternoon. In this case it would be better to create two contact types:

- long intensive (weekend) workshops
- short (afternoon) workshops.

as each one has different implications for staffing and student time.

Having listed each distinct contact strategy, answer questions 3-7 in the space provided:

SAMPLE CONTACT STRATEGY RESPONSE

Contact Strategy Type: *Tutorials*

3. How many hours a week or contact time does this involve?

Students attend two forty-five minute tutorials each week.

4. How many groups are there of how many students?

The students are broken into two groups of thirty and one of twenty

5. How many facilitators, tutors, lecturer or demonstrators are there at a time for each group?

Each big group is conducted by one tutor and one lecturer, and the small group is run by the lecturer

6. In addition to the time spent in the session, on average how much time do facilitators, tutors, lecturers or demonstrators spend preparing for each of these sessions?

The tutor spends, on average an additional hour and a half preparing for each tutorial.

7. Is this the optimal number of students per group for this contact strategy? If not, what would the ideal number of students be per group?

The ideal would be to have twenty students in each group and one lecturer facilitating it.

Contact Strategy Type A:

3. How many hours a week or contact time does this involve? Or if this contact strategy is not offered weekly, what are the total number of hours of this type of contact in the course?

4. How many groups are there of how many students?

5. How many facilitators, tutors, lecturer or demonstrators are there at a time for each group?

6. In addition to the time spent in the session, on average how much time do facilitators, tutors, lecturers or demonstrators spend preparing for each of these sessions?

7. Is this the optimal number of students per group for this contact strategy? If not, what would the ideal number of students be per group?

Contact Strategy Type B:

3. How many hours a week or contact time does this involve? Or if this contact strategy is not offered weekly, what are the total number of hours of this type of contact in the course?

4. How many groups are there of how many students?

5. How many facilitators, tutors, lecturer or demonstrators are there at a time for each group?

6. In addition to the time spent in the session, on average how much time do facilitators, tutors, lecturers or demonstrators spend preparing for each of these sessions?

7. Is this the optimal number of students per group for this contact strategy? If not, what would the ideal number of students be per group?

Contact Strategy Type C:

3. How many hours a week or contact time does this involve? Or if this contact strategy is not offered weekly, what are the total number of hours of this type of contact in the course?

4. How many groups are there of how many students?

5. How many facilitators, tutors, lecturer or demonstrators are there at a time for each group?

6. In addition to the time spent in the session, on average how much time do facilitators, tutors, lecturers or demonstrators spend preparing for each of these sessions?

7. Is this the optimal number of students per group for this contact strategy? If not, what would the ideal number of students be per group?

Contact Strategy Type D:

3. How many hours a week or contact time does this involve? Or if this contact strategy is not offered weekly, what are the total number of hours of this type of contact in the course?

4. How many groups are there of how many students?

5. How many facilitators, tutors, lecturer or demonstrators are there at a time for each group?

6. In addition to the time spent in the session, on average how much time do facilitators, tutors, lecturers or demonstrators spend preparing for each of these sessions?

7. Is this the optimal number of students per group for this contact strategy? If not, what would the ideal number of students be per group?

Individual Contact or Consultation

8. In addition to all the above contact, on average how much time do staff spend per week in offering individual consultation to students?

This can be expressed as an estimate of time spent per week or per day if necessary, but does need to be reduced to an average time per student eventually. For example,

Lecturers spend about half an hour each day in individual consultation with 20 students on this course and each tutors spends about one hour a week per group of 10 students.

So:

- lecturers spend 5 hours per week per 20 students which is 0.25 hours per week per student;*
- tutors spend 0.1 hours per week per student.*

ASSESSMENT ACTIVITIES

The following questions are important. They may be annoying at first, as they involve the rather nebulous concept of the ‘average student’ and estimates of the amount of time such a student is expected to devote to assessment tasks. They are important as once again the responses start to reveal approximations for notional hours of learning and student workload and by extension the resulting staffing or human resource implications to administer these processes

Again, we first list each type of assessment strategy distinguishing between examinations, tests, essays assignments, portfolios, tutorial or problem set submission etcetera. It may help to include the mark weighting for each of these (as a percentage or as the total number of marks).

Assessment Activities List	Mark Weighting
A.	
B.	
C.	
D.	
E.	

Again, as for the contact strategies you can extend this list if necessary. In this case we distinguish between assessment activities that are time bound and those that are not:

- *Time-bound assessment activities* take the same amount of time for each student. In this case we then distinguish how long it takes to prepare for the time-bound activity and how long it takes to do the activity. For example an examination takes 3 hours to do for all students, and the average student spends an extra ten hours preparing for this. A presentation takes fifteen minutes for each group of three to present, and each student spends three hours preparing for this.
- *Other assessment activities* are not time-bound and we then only reflect student preparation time. For example, an essay is simply submitted (it is not time-bound) and the average student may be expected to spend about 12 hours preparing for this essay.

In the first case, the student time also involves educator (or assessor or invigilator) time as at least one of these players has to present while the assessment activity is *being done*. In the second, the student spends all their assessment time independently without involving education staff.

For each assessment strategy, you now answer questions 9 to 13 in the space provided.

SAMPLE ASSESSMENT ACTIVITY RESPONSE

Assessment Activity Type: *June Examination*

9. How many of this type of activity are students expected to complete during the course?

There is only one June examination for the course.

10. Is this assessment activity time bound?

Yes - the examination is time bound

If so, answer questions 10a and 10b and then continue with question 11. If not skip to question 12.

11a. How long does it take a student to do the activity? (If it takes place during 'class' or contact time do not indicate this as this time will already be captured under contact strategies)

The examination is 1.5 hours and is written outside of normal 'class' or contact time.

11b. Is doing the assessment activity invigilated or supervised? If so, how many groups of students are there for each invigilated session and how many invigilators does this involve?

All students write together in one venue (one group) and there are 4 invigilators present.

12. How long does an average student take to prepare for this assessment activity task? If a student were to ask you how much time they should schedule for this task what you answer?

If the student has attended all the contact sessions, done the independent study and completed the other assessment activities they should spend about an extra 15 hours preparing for the examination.

13. Do students do the assessment activity individually or in groups? If in groups, how many students are in each group or how many groups are there?

They do the examination on their own (individually)

14. Who marks this assessment activity and how long does it take this person to mark it? This can be given as a number of hours for the entire set or as a per student estimate.

Tutors mark the examination scripts and a set of 10 papers takes about 3 hours to mark.

15. Is there any moderation for this assignment (either external, internal or both)? If so, how many of the total number of this type of assessment activity are moderated? Who is involved and how long do they take on each assessment activity?

The lecturer checks the tutor marking (internal moderation). About half the scripts are checked and a set of 10 papers takes about half an hour to moderate.

An external moderator checks 10% of the scripts (external moderation). In total, the external moderator spends about 6 hours on this.

Assessment Activity Type A:

9. How many of this type of activity are students expected to complete during this course?

10. Is this assessment activity timebound?

YES

NO

If YES, answer questions 10a and 10b and then continue with question 11. If NO, skip to question 12.

10a. How long does it take a student to do this activity? (If it takes place during 'class' or contact time do not indicate this as this time will already be captured under contact strategies)

10b. Is doing the assessment activity invigilated or supervised? If so, how many groups of students are there for each invigilated session and how many invigilators does this involve?

11. How long does it take an average student to prepare for the assessment activity? If a student were to ask you how much time they should schedule to prepare for assessment activity what would you answer?

12. Do students do the assignment individually or in groups? If in groups, how many students are in each group or how many groups are there?

13. Who marks this assessment activity and how long does it take this person to mark it? This can be given as a number of hours for the entire set or as a per student estimate.

14. Is there any moderation for this assignment (either external, internal or both)? If so, how many of the total number of this type of assessment activity are moderated? Who is involved and how long do they take on each assessment activity?

Assessment Activity Type B:

9. How many of this type of activity are students expected to complete during this course?

10. Is this assessment activity timebound?

YES

NO

If YES, answer questions 10a and 10b and then continue with question 11. If NO, skip to question 12.

10a. How long does it take a student to do this activity? (If it takes place during 'class' or contact time do not indicate this as this time will already be captured under contact strategies)

10b. Is doing the assessment activity invigilated or supervised? If so, how many groups of students are there for each invigilated session and how many invigilators does this involve?

11. How long does it take an average student to prepare for the assessment activity? If a student were to ask you how much time they should schedule to prepare for assessment activity what would you answer?

12. Do students do the assignment individually or in groups? If in groups, how many students are in each group or how many groups are there?

13. Who marks this assessment activity and how long does it take this person to mark it? This can be given as a number of hours for the entire set or as a per student estimate.

14. Is there any moderation for this assignment (either external, internal or both)? If so, how many of the total number of this type of assessment activity are moderated? Who is involved and how long do they take on each assessment activity?

Assessment Activity Type C:

9. How many of this type of activity are students expected to complete during this course?

10. Is this assessment activity timebound?

YES

NO

If YES, answer questions 10a and 10b and then continue with question 10. If NO, skip to question 11.

10a. How long does it take a student to do this activity? (If it takes place during 'class' or contact time do not indicate this as this time will already be captured under contact strategies)

10b. Is doing the assessment activity invigilated or supervised? If so, how many groups of students are there for each invigilated session and how many invigilators does this involve?

11. How long does it take an average student to prepare for the assessment activity? If a student were to ask you how much time they should schedule to prepare for assessment activity what would you answer?

12. Do students do the assignment individually or in groups? If in groups, how many students are in each group or how many groups are there?

13. Who marks this assessment activity and how long does it take this person to mark it? This can be given as a number of hours for the entire set or as a per student estimate.

14. Is there any moderation for this assignment (either external, internal or both)? If so, how many of the total number of this type of assessment activity are moderated? Who is involved and how long do they take on each assessment activity?

NOTE: Either 'copy and paste' extra versions of questions 9 to 14 or make extra photocopies of this page if your course has more than five contact strategy types.

Assessment Activity Type D:

9. How many of this type of activity are students expected to complete during this course?

10. Is this assessment activity timebound?

YES

NO

If YES, answer questions 10a and 10b and then continue with question 11. If NO, skip to question 12.

10a. How long does it take a student to do this activity? (If it takes place during 'class' or contact time do not indicate this as this time will already be captured under contact strategies)

10b. Is doing the assessment activity invigilated or supervised? If so, how many groups of students are there for each invigilated session and how many invigilators does this involve?

11. How long does it take an average student to prepare for the assessment activity? If a student were to ask you how much time they should schedule to prepare for assessment activity what would you answer?

12. Do students do the assignment individually or in groups? If in groups, how many students are in each group or how many groups are there?

13. Who marks this assessment activity and how long does it take this person to mark it? This can be given as a number of hours for the entire set or as a per student estimate.

14. Is there any moderation for this assignment (either external, internal or both)? If so, how many of the total number of this type of assessment activity are moderated? Who is involved and how long do they take on each assessment activity?

INDEPENDENT STUDY

15. What additional time are students expected to spend on course related-activities? This excludes preparation for assessment strategies but may include self assessment tasks.

For example,

- Learners are expected to read 10 chapters of the prescribed textbook. This is estimated to take 4 hours for each chapter; or
- Learners are expected to read all of the course materials and do all of the self-assessment activities. There are 15 modules each of which have about 20pages and 5 self assessment tasks. Students should spend about 10 hours on each module.

COURSE DESIGN

Remember that course design includes the following:

- Articulation of values and principles underpinning course.
- Articulating outcomes/objectives of course.
- Integrating an understanding of how learning works into all elements of the course.
- Design and development of:
 - Assessment strategies;
 - Contact sessions (structure, sequencing, and weighting);
 - Peer group sessions;
 - Materials (of all kinds); and
 - Content.
- Understanding the learners and their strengths.
- Understanding and reviewing the dynamics of the course team.
- Ongoing evaluation.
- Integrating all of the above to form a coherent course.

This does not include specialist materials production time like graphic design, editing and layout for printed materials, or production of a videocassette as this is covered in the next section. It does include the time spent conceptualising, planning and developing these materials.

16. What is the course design cycle? How often is this course totally redesigned? (Note this is usually expressed in years, often 3 or 5)

17. Is the course design time spread evenly over each year or the course design cycle, if not, estimate what percentage of time is spent over the design cycle?

Year 1:
Year 2:
Year 3:
Year 4:
Year 5:

18. Estimate how much time is spent on course design. This can be estimates as the amount of course design time for each hour of student learning (for each notional hour) or as a total amount of course design time spent within the design cycle

For example,

16. We totally redesign the course every three years.
17. There is more work in the first year but we always have to make changes in the second and third years. We estimate that:

Year 1: 40%
 Year 2: 20%
 Year 3: 20%
 of our time is spent on course design.
 18. On average, the three course team members each spend about three weeks planning the course before it starts and then for every hour of student learning time, we probably spend about two hours on course design between us.
 So this is: 8 hours per day times 5 days per week times 3 weeks times 3 course team members and would be calculated as follows:
 (3 weeks) times (5 working days per week) times (eight hours per day) = 120 hours
 Total time = (120 hours times three course team members) plus (student notional hours times two)

COURSE MATERIALS

19. List all the course materials given to, or bought by, students in this table. Include printed, audio, video materials and multimedia or computer-based materials

List of Course Material
Printed materials
Audio materials
Video materials
Multimedia/computer-based materials

Now for each type of material, answer questions 17 to 21 below.
 We provide sample responses for printed and a video material, before presenting four sets of questions

SAMPLE MATERIAL RESPONSE

Material Type: *Course Information and Tutorial Guide Booklet*

20. Is this material printed, audio, video or computer-based?

Printed

21. In what units is it measured? (per minute, page, file, article,

18. For printed materials estimate the number of pages

Forty pages

19. How many of these pages have been brought in from somewhere else or where not designed by the course team (if any)?

The front and back covers use the standard programme design. A four page article has been reproduced from a published book.

20. Were there any copyright or licensing costs related to this material? If so, what is the:

- **total copyright cost and for how long is this valid? or**
- **total copyright cost per course offering? or**
- **copyright cost per student?**

We got copyright permission to reproduce four diagrams. We were charged 20c per reproduction for each diagram (this is a copyright cost per student).

For reproducing the article we paid an annual copyright fee of R1000 for unlimited educational reproduction of this article (this is the total copyright cost and it is valid for one year).

21. Answer either 21a, b or c depending on the type of material

21a. *not applicable*

21b. *not applicable*

21c. If this type of printed material is bought or produced for each student taking the course, are they charged for it? If so, what are they charged?

Each student is given one of these - they are not charged for it.

SAMPLE AUDIO OR VIDEO MATERIAL RESPONSE

Material Type: *Video series on Mechanics in Motion*

17. Is this material printed, audio, video or computer-based?

Video

18. For video materials estimate the number of minutes of viewing time.

There are four videos in the series - each one is 25 minutes long. (Four videos times twenty-five minutes each = 100 minutes)

19. How many of minutes of footage have been brought in from somewhere else or where not designed by the course team (if any)?

All of the video footage has been brought in from elsewhere - we did not make or edit the video

20. Were there any copyright costs related to this material? If so, what is the:

- **total copyright cost and for how long is this valid? or**
- **total copyright cost per course offering? or**
- **copyright cost per student?**

No copyright costs. We have not duplicated the videos as we bought two sets. If student number go up by a whole new group we may have to buy another set of the video or apply for copyright permission.

21. Answer either 21a, b or c depending on the type of material

21a. If this type of printed material is bought or produced once and then used for a number of years, then:

- **How many of these printed materials are bought in this initial purchase?**
- **After how many years, does this investment have to be made again?**

We bought this video series and use it to introduce five of the tutorial sessions. We bought two sets of the videos and may have to repurchase or buy updated versions in five years time.

21b. *not applicable*

21c. *not applicable*

Material Type A:

17. Is this material printed, audio, video or computer-based?

18. For

- printed materials, estimate the number of pages;
- audio or video materials estimate the number of minutes of listening or viewing time; and for
- computer-based materials estimate the number of hours of student time using the materials

19. How many of these pages (minutes or hours) of the material have been brought in from somewhere else or where not designed by the course team (if any)?

20. Were there any copyright costs related to this material? If so, what is the:

- total copyright cost and for how long is this valid? or
- total copyright cost per course offering? or
- copyright cost per student?

21. Answer either 21a, b or c depending on the type of material

21a. *If this type of material is bought or produced once* and then used for a number of years, then:

- How many of these materials are bought in this initial purchase?
- After how many years, does this investment have to be made again?

21b. *If this type of material is bought or produced for each course offering*, then on average how many are bought or produced each time the course is run?

21c. *If this type of material is bought or produced for each student taking the course*, are they charged for it? If so, what are they charged?

Material Type B:

17. Is this material printed, audio, video or computer-based?

18. For

- printed materials, estimate the number of pages;
- audio or video materials estimate the number of minutes of listening or viewing time; and for
- computer-based materials estimate the number of hours of student time using the materials

19. How many of these pages (minutes or hours) of the material have been brought in from somewhere else or where not designed by the course team (if any)?

20. Were there any copyright costs related to this material? If so, what is the:

- total copyright cost and for how long is this valid? or
- total copyright cost per course offering? or
- copyright cost per student?

21. Answer either 21a, b or c depending on the type of material

21a. *If this type of material is bought or produced once* and then used for a number of years, then:

- How many of these materials are bought in this initial purchase?
- After how many years, does this investment have to be made again?

21b. *If this type of material is bought or produced for each course offering*, then on average how many are bought or produced each time the course is run?

21c. *If this type of material is bought or produced for each student taking the course*, are they charged for it? If so, what are they charged?

Material Type C:

17. Is this material printed, audio, video or computer-based?

18. For

- printed materials, estimate the number of pages;
- audio or video materials estimate the number of minutes of listening or viewing time; and for
- computer-based materials estimate the number of hours of student time using the materials

19. How many of these pages (minutes or hours) of the material have been brought in from somewhere else or where not designed by the course team (if any)?

20. Were there any copyright costs related to this material? If so, what is the:

- total copyright cost and for how long is this valid? or
- total copyright cost per course offering? or
- copyright cost per student?

21. Answer either 21a, b or c depending on the type of material

21a. *If this type of material is bought or produced once* and then used for a number of years, then:

- How many of these materials are bought in this initial purchase?
- After how many years, does this investment have to be made again?

21b. *If this type of material is bought or produced for each course offering*, then on average how many are bought or produced each time the course is run?

21c. *If this type of material is bought or produced for each student taking the course*, are they charged for it? If so, what are they charged?

NOTE: Either 'copy and paste' extra versions of questions 17 to 21 or make extra photocopies of this page if your course has more than four types of course materials.

Material Type D:

17. Is this material printed, audio, video or computer-based?

18. For

- printed materials, estimate the number of pages;
- audio or video materials estimate the number of minutes of listening or viewing time; and for
- computer-based materials estimate the number of hours of student time using the materials

19. How many of these pages (minutes or hours) of the material have been brought in from somewhere else or where not designed by the course team (if any)?

20. Were there any copyright costs related to this material? If so, what is the:

- total copyright cost and for how long is this valid? or
- total copyright cost per course offering? or
- copyright cost per student?

21. Answer either 21a, b or c depending on the type of material

21a. *If this type of material is bought or produced once* and then used for a number of years, then:

- How many of these materials are bought in this initial purchase?
- After how many years, does this investment have to be made again?

21b. *If this type of material is bought or produced for each course offering*, then on average how many are bought or produced each time the course is run?

21c. *If this type of material is bought or produced for each student taking the course*, are they charged for it? If so, what are they charged?

OTHER DIRECT COSTS

22. What percentage of the course teams time should ideally be devoted to pure research?

23. Are there any other costs that relate to this course? Please write down what these are, including:

- in what units this is measured;
- what each unit costs (on average); and
- how many such units are used per course offering (or per student or specify over what time period).

If you present this as a lump-sum or total, then please specify after how many years reinvestment would be necessary.

Either type in this table, using as much space as you require, or attach another blank page to this questionnaire.

For example,

Travel:

Lectures have to travel to run weekend workshops in several provinces.

The cost of a local air flight = R2,000

Accommodation and/ or subsistence allowance per night = R400

There are two weekend workshops in each of four provinces.

Therefore the total

- travel costs = R2,000 times 2 workshops times 4 provinces = R16,000
- accommodation costs = R400 times 2 workshops times 2 nights times 4 provinces = R4,600

Technology:

We use laboratory equipment for our practical sessions.

We spend R1,000 for each week that we run practical laboratory sessions on chemicals and replacing laboratory equipment stock. As mentioned under 'contact strategies', this is for running the five laboratory sessions per week (which consist of 5 groups of 16 students each). The costs would go up if we had to have more student groups as each student works in a pair and needs the chemicals and equipment.

NOTE: The laboratory and its fixed infrastructure is planned separately as it is used for several courses. The time spent designing laboratory sessions and the laboratory manual should be considered under 'course materials'. The related supervision during laboratory sessions should be considered under 'contact strategies'.

24. How many notional hours of learning (in SAQA (NQF terms)) have been allocated for this course

25. List any sources of course income (including government subsidy, student fees, student payment and funding grants) that you are aware of

25. Do you have any comments you would like to make about how you found using this questionnaire? If you found specific questions difficult to answer or any questions unclear - please specify which questions these were. How would you improve this instrument?