INSTRUCTIONAL LEADERSHIP AND CURRICULUM DEVELOPMENT IN CURRICULUM 2005: A QUALITY ASSURANCE PERSPECTIVE

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DECLARATION

I declare that the thesis submitted here by me for the Ph.D. degree at the University of the Free State, is my own independent work and has not been submitted previously by me at another university. I further cede copyright of the thesis in favour of the University of the Free State.

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Teboho Motaboli

Date

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DEDICATION

I dedicate this work to my family; my mother, my wife Janet Motaboli, my daughters Malaika Motaboli and Abena Motaboli, for the spiritual support and the strength that they gave me to work under challenging conditions up to the conclusion of this research project.

SUMMARY

The primary aim of this research was to obtain first hand information from instructional leaders (principals, Heads of Department (HoDs) and teachers), about the ease and difficulties that they experience in interpreting C2005 guidelines and translating them into classroom programmes in the Free State. Contingent to the above aim, the research aimed to develop a quality assurance framework that could enhance the successful implementation of C2005. The aim of the research was to be achieved through a qualitative empirical study of the views, statements, opinions and meanings that instructional leaders of the GET senior phase (grades 7 to 9) give to their experiences.

To inform the empirical study, an extensive literature review of instructional leadership, curriculum development and quality assurance in general and in C2005 in particular was undertaken. Functional aspects in which instructional leaders experience difficulties were analysed under design, dissemination, implementation and evaluation of C2005, or as the SA government prefers; context, inputs, process and outputs. All these were discussed in detail in chapters 2, 3 and 4.

The following related difficulties were established through the research: instructional leaders stated that the “top down” approach to design, dissemination, implementation and evaluation of C2005 guidelines has alienated instructional leaders. The change to C2005 was poorly financed, rushed and had little preparation in training and resources. Furthermore in the absence of instructional leaders’ input, the task teams that the DoE selected to design C2005 guidelines did not capture the actual challenging and difficult conditions in the school and classroom in which C2005 is implemented. The failure of the DoE to take instructional leaders on board has resulted in technical and language difficulties for instructional leaders; it has prevented instructional leaders from buying into C2005 processes and co owning them and hinders quality delivery of C2005.

Moreover, a quality assurance system that could have ensured that most of the problems are designed out in C2005 was not in place when C2005 was first implemented in 1998. The quality assurance structures that exist at the time of writing were only legislated in 2001. However, instructional leaders say that the IQMS and its agencies such as the WSE, DAS and PMS do not address instructional leaders' classroom implementation problems. To address such problems, some recommendations were made.

The most important recommendations that are made in chapter 7 are that besides accreditation, the DoE should consider adopting a collaborative quality culture and quality assurance systems in the further development of C2005. The research recommends that the DoE consider allocating more money for transformation, training more learning facilitators and instructional leaders thoroughly and strongly support them. The research also recommends that the DoE selectively adopt some elements of established quality assurance systems such as the Total Quality Management and International Standards Organisation system (ISO 9000) to inject quality culture into all planning and development of C2005. The DoE is advised to take more time to plan and implement well-researched and piloted recommendations resolutely. These improvements are provided for in the guidelines of a quality assurance framework that is proposed by this research and points to future research to achieve cohesive quality implementation of C2005 in its latest form as NCS.

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The appendices for this writing include the following:

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Abbreviations.

AIDS	Acquired Immune Deficiency Syndrome
ANC	African National Congress
CASS	Continuous Assessment
CEM	Council of Education Ministers
cf	Confirm
COLTS	Culture of Learning and Teaching Services
COSATU	Congress of South African Trade Unions
COTEP	Committee on Teacher Education Policy
CTA	Common Test of Assessment
C2005	Curriculum 2005
DAS	Developmental Appraisal System
DET	Department of Education and Training
DoE	Department of Education
DSE	Developmental System for Education
EAT	External Assessment Test
ELRC	Education Labour Relations Council
EPU	Education Policy Unit
ETQA	Education and Training Quality Assurance
ETQAs	Education and Training Quality Assurers
FET	Further Education and Training
FSDoE	Free State Department of Education
GEAR	Growth Employment and Redistribution Programme
GET	General Education and Training
GNU	Government of National Unity
HET	Higher Education and Training
HIV	Human immune Virus
HOD	Head of Department
HSRC	Human Sciences Research Council
ILS	Inventory of Learning Styles

ISO	International Standards Organisation
IQA	Integrated Quality Assurance
IQMS	Integrated Quality Management System
LFs	Learning Facilitators
NAPTOSA	National Association of Professional Teachers of South Africa
NCDC	National Curriculum Development Committee
NCS	National Curriculum Statement
NDoE	National Department of Education Directives
NECC	National Education Co ordination Committee
NFER	National Foundation for Educational Research
NQF	National Qualification Framework
NSE	Norms and Standards for Educators
OBE	Outcomes-Based Education
OFSTED	Office for Standards in Education
PIL	Principal as an Instructional Leader
PMS	Performance Management System
PMDS	Performance Management Development System
RASI	Revised Approach to Studying Inventory
RDD	Research Development and Dissemination
RDP	Reconstruction and Development Programme
RNCS	Revised National Curriculum Statement
RRC 2005	Report of the Review Committee of C2005
SACE	South African Council of Education
SADTU	South African Democratic Teachers' Union
SASA	South African Schools Act
SATU	South African teachers Union
SAUVCA	South African Universities Vice-Chancellors' Association
SGB	School Governing Bodies
SGB	Standards Generating Bodies
SMT	School Management Teams
SPSS	Statistical Package for Social Sciences

SWOT	Strengths, Weaknesses, Opportunities and Threats
TES	Teachers Education Supplement
TIL	Teacher as an Instructional Leader
TQM	Total Quality Management
WSE	Whole School Evaluation

CHAPTER 1

ORIENTATION

1.1 Introduction

The biggest challenge facing the first democratically elected government of South Africa (SA) since 1994 has been how to transform the whole society to a democratic, equitable and highly productive society (Pretorius & Lemmer, 1998:1-2). In the planned transformation the African National Congress (ANC) government included developing the economic capacity of South Africa (SA) to meet the challenges of global and technological competitiveness (DoE, 1997:4; E P U – Wits, 1994; DoE, 1995; Higgs, 1995:109).

The goals of transformation, democratising and redressing inequities among the citizens of SA and making the SA economy globally competitive were so central to the government that the goals were given expression in the Constitution of the Republic of SA (1996) and the National Education Policy Act (1996) (DoE, 1997:4). The goals were further expressed as principles to guide socio economic and political actions of the state and the people of SA (Government Communication and Information System [GCIS], 2005:215-216).

In fulfilling the principles of democratisation, redressing inequities, economic development and competitiveness, the ANC government also set out to transform education and to use education as an agent of social, political and economic change and development (Chisholm, 2004:3; Coleman, Graham-Jolly and Middlewood, 2003:vii,35; Du Toit & Du Toit, 2003:2). To this end the ANC government unified the SA education system and adopted an Outcomes Based Education (OBE) curriculum model of teaching and

learning called Curriculum 2005 (C2005) (Gravett & Geyser, 2004:8-9; Jacobs, Vakalisa & Gawe, 2004:2). C2005 was implemented officially in grades 1 in 1998 (Bot, 2000:4; Jacobs et al., 2004:58-59) (see sections 3.5.4, 3.5.5).

From 1998, C2005 evolved quickly as it was implemented in a rush (Oosthuizen, 2004:3). The timetable for the implementation of the NCS is given in section 3.5.4, Table 3.3. However, resulting from the rushed implementation, conceptual and technical difficulties soon began to manifest themselves in poor comprehension and implementation of C2005 by instructional leaders at school and classroom levels (Coleman et al., 2003:58), (see sections 1.4 & 1.5 & chapter 2). Consequently, in 2000, the government commissioned a review of C2005. Following the recommendations of the review committee, C2005 was streamlined and strengthened (Chisholm, 2001:15-18) (see sections 3.5.2 & 3.5.3). Subsequently in 2002, C2005 was renamed the Revised National Curriculum Statement (RNCS). However the word "Revised" represented by "R" in the title RNCS was dropped in June 2006 in favour of the title National Curriculum Statement (NCS) for grades R to 9 (De Villiers, 2006).

The NCS is strengthened and streamlined C2005 (DoE, 2002:134). C2005 is the basis, distinguishing concept/title on which improvements have been made (DoE, 2003). C2005 remains as a constant in official documents. It is with this understanding therefore that the title C2005 is used in this research.

Notwithstanding streamlining, strengthening and changes in the title of C2005 as it evolves, poor articulation, understanding, implementation of C2005 guidelines, and outcomes persisted among instructional leaders at school level (Seepe, 2004:23). The problems had also been reflected in the form of late supply of Learning Support Materials (LSMs), limited finance

and Learning Facilitators (LFs) for training instructional leaders at the national and provincial levels where C2005 guidelines were disseminated (Beets & Le Grange, 2005:190; DoE, 2001; DoE, 2000:15)**.** However, these problems confirmed that successful educational and national transformation of SA ultimately depends on effective implementation of C2005 (Vakalisa, 2000:18-25; Williams, 2003:59).

Consequently, the problems beg the following question: From the instructional leaders' understanding, with what ease and difficulties have they interpreted C2005 guidelines and implemented C2005 optimally at school level?

In the remaining sections of this chapter, instructional leadership, curriculum development and quality assurance of C2005 in theory and practice are analysed to highlight the difficulties that instructional leaders have experienced in their implementation of C2005 at school level. The research problem, the aims and objectives are stated in sections 1.4, 1.5 and 1.6. The methods that were used to investigate and analyse the difficulties and report on the findings will be presented in details in sections 1.9 onwards. The next task is to reflect on the initial literature trends regarding the ease and difficulties that instructional leaders have experienced in the curriculum development of C2005.

1.2 Instructional Leadership and Development of C2005

In this section and its sub sections the attempts that the DoE has made to assure quality in interpretation, dissemination, and implementation of C2005 guidelines and the attendant difficulties that instructional leaders experience are noted.

1.2.1 **Difficulties related to C2005 guidelines and practice**

Coetzee (2002:5) argues that in order for C2005 to play its role in transforming the SA society effectively, it has to be delivered effectively as quality knowledge by instructional leaders. However Kramer (2002:3) indicates that the OBE approach that underlies C2005 implementation has had problems in SA. Kramer (2002:3) suggests that some of the problems were to be expected because OBE is new in SA.

Moreover, Coleman, Graham-Jolly, Middlewood (2003: 39) go further and distinguish some of the OBE and consequently C2005 problems as behaviouralist limitations, political prioritisation and poor preparation for the introduction of OBE driven C2005. The sum total of the problems is the mismatch between the intentions of C2005 policy and guidelines at macro level of curriculum development on the one hand, and the outcomes of implemented C2005 guidelines at school (meso), and classroom (micro) levels on the other hand (Coleman et al. 2003:44; Lewin, Samuel & Chisholm, 2001:3;).

The discrepancy between C2005 policy expectations and poor practical classroom outcomes was confirmed by the first official evaluation of C2005 implementation undertaken in 2000 (Chisholm, 2001:3). According to Chisholm (2001:3) the problems boiled down to instructional leaders' limited comprehension of C2005 policy and guidelines and resulted in poor implementation of C2005 at school level. Other related problems were made evident by critical reviews of teachers' understanding of guidelines and effectiveness of their implementation (Jansen in Coleman et al., 2003:39 - 42).

These reviews also suggested that success in the translation of C2005 guidelines into practical classroom programmes would depends on the efficiency of instructional leadership and curriculum development (Vakalisa,

2000:18-25; Williams, 2003:59). Hence it is appropriate that the problems of instructional leadership, curriculum development of C2005 be examined seriously from national to school level.

In this way the study adds a technical and cultural quality assurance perspective to the growing body of knowledge about the changing manner in which curriculum is studied in SA. Christie and Jansen (1999:11-17) have argued that the adoption of OBE has brought a change in Curriculum Studies. The changes require teachers to understand how curriculum is designed from education policy. If teachers do not have such understanding, Coleman et al. (2003:44-45) argue that there will be a gap between the institutional policy and practice. However, Coleman et al (2003:44-45) also indicate that there are many reasons why C2005 policy guidelines are interpreted differently from the national policy to school level. One of the reasons is the "top down" structure and organisation of the DoE in its implementation of C2005 as the following sections will show.

1.2.2 **Instructional leaders and "top down" policies**

The first most important educational transformation change that was achieved by many educational laws after 1994 was the unification of eighteen racially divided departments of education into one National Ministry of Education and nine Provincial Departments of Education (Chisholm, 2004:1). To consolidate this unification of education into one structural unit the ANC government established the South African Qualifications Authority (SAQA) in 1995 to oversee development of the National Qualifications Framework (NQF) (Coetzee, 2002:3; Coleman et al., 2003:11; Van der Westhuizen, 2003: 9)**.** However, instructional leaders at school level have seen these OBE oriented changes as impositions from the "top down" and alienating (Coleman et al., 2003:57).

The instructional leaders' difficulties have also been interpreted as poor coordination and alignment of C2005 policy and practice or fragmented quality relations between the different quality assurance programmes of C2005 (Education Labour Relation Council [ELRC], 2003:1-2). Moreover poor coordination became more pronounced when the first major review of C2005 was undertaken. The review showed that there was more rhetoric about participation and collaboration between all stakeholders in the development of C2005 than there was practical application (DoE, 2001:19). In this regard, Mthethwa (2002:47) confirms that instructional leaders have not been called to participate in C2005 policy and guidelines discussions.

Beyond the difficulties of instructional leadership at school, Coleman et al (2003:44-45) also suggest that some stakeholders such as provincial directorates, district learning facilitators and teachers misinterpret national intentions. Mthethwa (2002:47), a teacher and a trade union leader, noted that C2005 has been designed and implemented from "top down" with little or no feedback from teachers at school level. The exclusion of teachers has resulted in the teachers' misunderstanding and ineffective implementation of the curriculum (Mthethwa, 2002:47). Mthethwa (2002:47) also noted that where there has been an attempt to involve instructional leaders at school level, the DoE has brought them on board after the policy and guidelines have been declared. In such cases instructional leaders are expected to merely implement the curriculum guidelines and not to discuss their formulation. Consequently instructional leaders experience difficulties in the implementation of C2005 on a daily basis, because they have a poor understanding of the requirements of C2005 policy and guidelines (Coleman et al. 2003:39).

This research is therefore justified because it seeks to obtain instructional leaders' views and understanding of the requirements of C2005 guidelines and the difficulties that they experience in assuring quality implementation of

C2005, with the intention of generating solutions. The study is further justified because the DoE needs to determine the extent to which current quality assurance structures address instructional leaders' difficulties. Finally the research would reinforce the existing structures and design a framework that will include instructional leaders' input and bring cohesion to the long term quality development of C2005.

1.2.3 **Curriculum Development of C2005**

Coleman et al. (2003:44-45) contend that the ANC's singular development of the Reconstruction and Development Programme (RDP) policy without consulting teachers illustrates the absence of the tradition of consultation in the curriculum development (Education Policy Unit [EPU] & National Education Coordinating Committee [NECC], 1994:1).

Jansen and Christie (1999:6-7) confirmed that the ANC policy, the central initiatives and details of transformation policy were carried out from the top through the OBE driven C2005.

Contingently, the creation of SAQA in 1995 was another major legal initiative to transform education in SA (Van der Westhuizen, 2003:9-10). The SAQA was created to develop the NQF and oversee its functioning. The stated functions of the NQF are to integrate education and training, to reflect the nature and quality of all recognised qualifications in SA, to make education more accessible to all South Africans and to promote Lifelong Learning among others (Coetzee, 2002:3; Van der Westhuizen, 2003:10).

From the government policy point of view, SAQA, NQF along with C2005 have complied with the constitutional principles and goals of democratising, redressing imbalances of the past and developing the technological and economic competitiveness of SA in the world. Conjointly, they have also transformed education in SA to achieve targeted government policy goals.

Coetzee (2002:5) asserts that at the national level, the NQF is being used in SA as an assessment led method of curriculum transformation. The method was used before in countries such as Britain, Australia and New Zealand. In the instances, every standard and qualification that is registered on the NQF is evaluated against the NQF objectives and principles. By centralising accreditation, the state indirectly determines the content and quality of provision of education (Coetzee, 2002:5; Chisholm, 2004:1). The SAQA and NQF requirements have further implications on classroom instruction, curriculum development and quality assurance (Chisholm, 2001:1; Mthethwa, 2002:47- 48). A pertinent question that is related to the difficulties that instructional leaders experience is: With what ease and difficulty are instructional leaders as education providers working and complying with SAQA and NQF requirements?

Moreover Ramsden (Fourie, Strydom & Stetar, 1999:16) concluded that, "there is lack of shared discourse about quality and its development between policy managers and instructional leaders". Researchers in *Education 2000 Plus* project (2001:15) concurred and asserted that the problems of C2005 implementation had been related to ineffective instructional leadership and quality assurance.

However Hite and Botha (2000:139) argue from an interactive angle on the issue of translating policy to practice that instructional leaders have to make dramatic changes in order to cope with C2005 implementation. Hite and Botha (2000:139) also caution that "quality will not be achieved by accident or management dictates. It requires cultural change in management behaviour and attitudes of everyone to quality".

Whitaker (1998:1) also concludes that "effecting such social and cultural changes in educational practice tends to come from practitioners

themselves especially when they are trained in using policy to develop curriculum".

Steyn (1999:359) corroborate this conclusion and suggests that the solution to the problem of alignment of education policy guidelines and practice is for instructional leadership, "principals and teachers to become part of the empirical construction of a framework within which to develop quality assurance and delivery of OBE based C2005 in public schools in SA".

1.3 A quality assurance perspective

While quality assurance came from industry where it had developed as a result of pressure to increase productivity after the Second World War, from 1945, it was adopted by services such as education in the early 1990s (Bradley, 1993:7-11). This section will show how quality assurance is now used in policy design, in a "top down" approach that contributes to difficulties for instructional leadership in C2005. The clarification of quality assurance forms the context of the statement of the problem of this research.

1.3.1 **Quality assurance of policy and practice**

From a quality assurance perspective of instructional leadership and curriculum development of C2005 policy and guidelines, literature from business suggests that quality assurance and Total Quality Management (TQM) do align policy and practice and remove the discrepancy between the two in business (Bogue & Saunders, 1992:33; Needham, Dransfield, Cole, Harris & Rawlinson, 2003:352,356; Steyn, 1999:357) (also see section 4.12). Quality assurance has also been used extensively in higher education for the same purpose (Griesel, 2002:1-4). Bogue and Saunders (1992:17) also record extensive use of quality assurance at school level in the United States. The next part of this section presents quality assurance measures that have been implemented alongside C2005 until now but have

not addressed instructional leaders' difficulties of curriculum development at school level.

1.3.2 **Top down quality assurance in C2005**

Quality assurance of the design and implementation of education in SA has mostly been undertaken at higher education level. SAQA, which was established in 1995, was one of the earliest structures together with the NQF. The NQF in turn was created to deal with quality monitoring at many levels of education (Coetzee, 2002:3-4). Many other education and training quality assurance structures, systems and their directorates were created after 2001.

At the time of writing the Integrated Quality Management System (IQMS) was the major quality assurance system under the Directorate of Quality Assurance, specifically dealing with quality at school level. The IQMS had integrated three (3) sub systems: Development Appraisal system (DAS), Whole School Evaluation (WSE) and Performance Management System (PMS). While their implementation had not been completed at the time of writing, one top government source had already been quoted as accepting that IQMS addresses the needs of teachers, but it is too complex to be immediately implemented well (DoE, 2005; ELRC, 2003:1). Outside the Directorate: Quality Assurance there is Umalusi. Other systems and bodies that deal with quality in education and training are: the Standard Generating Bodies (SGBs), the National Standard Bodies (NSBs), and Education and Training Quality Assurers (ETQAs) (see chapter 4, sections 4.3 & 4.7).

Williams (2003:61) suggests that to make a quality assurance system optimally aligned with classroom practice; instructional leaders would have to be involved in the formulation of quality assurance policy.

However, there is no evidence that instructional leaders were involved when the National Curriculum Development and Management Committees for GET laid the foundation for the establishment of a framework for designing C2005 and quality assurance in 1995 and 1996 respectively (Chisholm, 2000:2; 2001:2; Jansen & Christie, 1999:7). This exclusion of instructional leaders contrasts with Kramer's (2002: 5) contention that teachers need to be encouraged to associate with the C2005 changes in policy formulation and implementation. Consequently, at the moment it is important to find out how far instructional leaders have internalised the changes to C2005 and its quality assurance. Do they co own C2005? Williams (2003:59) says they do not; hence the search for a framework that would ensure that they do.

1.3.3 **Quality assurance of instructional leadership**

Notwithstanding lack of instructional leaders' participation recorded above, there are other important policy documents, structures and pieces of legislation relating to C2005 that can be seen as forming part of quality assurance for the delivery of C2005. Among the pieces of legislation are: the National Education Policy Act (NEPA) (Act 27 of 1996), the South African Schools Act (SASA) (Act 84 of 1996). The SASA states that the SGBs are entrusted with capacity building among schools and provision of quality education (Kgobe, 2001:4).

Writings on educational paradigm change to OBE suggest that to achieve quality curriculum transformation needs a cultural change of curriculum through both "top down" and "bottom up" approaches. The government legislation in education has represented a "top down" approach, and needs to be complemented by a "bottom up" approach. The latter can be achieved by participative, democratic and collegial cooperation between the leadership at national, provincial and school levels for assurance of quality especially in the classroom (Coetzer, 2001:85, Morrison, 1998:15).

Furthermore, Glasser (1990:8) states that the majority of teachers worldwide are convinced that the collegial approach holds the key to the solution of quality curriculum implementation problems.

However, at the time of writing the government had still adopted the stuttering “top down” policy approaches to curriculum development in the implementation of C2005 (Chisholm, 2004:198 – 199) (see chapter 3, section 3.5.4). It is important to find out whether the DoE officials could still be very receptive to instructional leaders’ inputs in the matters of C2005 policy and guidelines under such an arrangement. If it was found that the top down approach creates a gap between the DoE officials and instructional leaders, what form would an alternative participative quality assurance framework take?

It is sometimes argued that teachers already have some nominal and formal representation in policy-making through their union structures such as the Education and Labour Relations Council that was created by the Labour Relations Act of 1995 (Chisholm, 2004:272). However the main function of such representation is to secure improved conditions of service for members. Such representation does not address teachers’ problems with C2005 development (Govender in Chisholm, 2004:267; Pithouse, 2001:155).

What is needed is participation by all parties in C2005 development to create an environment that is receptive to instructional leaders’ classroom difficulties and consequently aligns curriculum policy and practice well (Hindle in Lewin, Samuel & Sayad, 2003:333). For this reason a systematic diagnosis, exploration and insight into the difficulties that instructional leaders experience in C2005 development and possible causes of the difficulties is needed.

1.3.4 **The need for an holistic, diagnostic evaluation of C2005**

Bless and Higson-Smith (1995:48) indicates that explorative, holistic and diagnostic evaluation could appropriately highlight the present trends, problems, forces and resources that could influence implementation of an educational programme. For this study the diagnostic evaluation would look at instructional leadership understanding of the difficulties that they experience in translating C2005 guidelines into quality programmes of C2005 at school level of the GET Band, senior phase (grades 7 to 9).

A diagnostic evaluation of the difficulties in the implementation of C2005 will also establish some of the strengths and limitations that quality assurance systems, such as IQMS, have in addressing the difficulties that instructional leaders experience. This would also indirectly indicate why learners are still performing poorly in C2005 (Bot, 2005:2; Pandor, 2005).

1.4 Statement of the problem

The main problem highlighted by the primary literature consulted in the foregoing sections, is that in spite of the DoE attempts to ease implementation of C2005, principals, HoDs and teachers are still experiencing difficulties in translating C2005 guidelines to programmes, classroom schedules, lesson plans (curriculum development at school level). Teachers have problems in managing classes, pacing and delivering lessons (instructional leadership) at GET Band in the senior phase (grades 7 to 9) (Bot, 2005:2). Therefore some pertinent research questions that could be asked are: In their understanding, with what ease and difficulties are instructional leaders providing leadership in the interpretation of C2005 guidelines that show how C2005 should be implemented? From a quality assurance perspective, what reinforcement is required to existing quality assurance structures? What framework could be designed with input of instructional leaders to assure quality implementation of C2005 at school and classroom levels more effectively?

The research into instructional leadership difficulties and quality assurance is necessary because there is a proliferation of research projects on how to best implement C2005, and how to assure quality of C2005 implementation from the official "top to bottom" standpoint. Yet none of the projects has independently focused specifically on investigating the instructional leadership difficulties of interpretation, programming and implementation of C2005 at school and classroom levels, and the option of a quality assurance perspective that is informed by instructional leaders themselves.

Pithouse (2001:155-156) argues persuasively that a framework developed from common understanding between DoE and instructional leaders would have the strength and synergy of collaboration and participation. Such a framework would ensure that instructional leaders share ownership of OBE driven C2005 and implement it meaningfully as part of a mutually understood quality education.

In order to determine the causes and nature of the difficulties of instructional leadership, development of C2005 and from a quality assurance perspective to establish what improvements are needed to the existing quality assurance structures and what framework could be designed with instructional leaders' input to preempt further problems, the following questions are constructed to guide the search:

- With what ease and difficulties do principals, HoDs and teachers translate C2005 guidelines and facilitate their school level implementation as teaching-learning activities (classroom practice) in school? It could be anticipated that when instructional leaders answer this question, they will reveal the understanding and meanings that they give to their experiences in the development of C2005 (see Chapter 2).
- With what ease and difficulties do instructional leaders interpret, design at school level, implement and evaluate (curriculum development)

C2005? Addressing the question would reveal understanding and meanings that instructional leaders have about the difficulties that they experience (see chapter 3).

- What is the instructional leaders' assessment (view of successes and limitations) of IQMS, DAS, WSE and PMS in addressing instructional leaders' difficulties in assuring quality development of C2005? (see chapter 4).
- How could we determine what instructional leaders experience and understand to be working or creating the difficulties that they experience in translating C2005 policy and guidelines into classroom programmes and assuring their quality delivery? (see chapters 5 and 6).
- How can the existing quality assurance structures be strengthened? What quality assurance framework could be developed with teachers' input to address the difficulties of design, interpretation, programming, implementation and evaluation of C2005 at school level? (see chapter 7).

Pithouse (2001:157) sees the main problem as the discrepancy between what C2005 designers intend and the unexpected outcomes, and notes that the long-term goals of educational transformation will not be achieved if instructional leaders are not empowered to develop a sense of ownership of C2005 development. An initial literature review suggests that a sense of ownership could be developed through collaboration, partnership, cooperation, capacity building, empowerment and understanding of instructional leadership especially over instructional issues that they face on a daily basis (Williams, 2003:59).

1.5 The Aim of the study

The general aim of the research is to explore the instructional leaders' views on the ease and difficulties with which they have developed C2005 guidelines into classroom lessons at GET Band, grades 7–9. The contingent aim is to adopt a quality assurance perspective that will help

review, strengthen existing quality assurance structures and suggest an alternative quality assurance framework within which principals, HoDs and teachers could make an input and buy into the processes of implementing C2005, thus facilitating a higher rate of success for it.

1.6 Objectives of the study

In order to achieve the foregoing stated aim the objectives of the research are to:

- Review literature on instructional leadership of OBE driven C2005 implementation, in order to establish the details of what instructional leaders (principals, HoDs and teachers) find working and problematic as they translate C2005 guidelines into instructions and implement them at classroom level (see chapter 2).
- Review literature on C2005 development at macro, meso and micro levels in order to determine the areas, the form and extent of difficulties faced by principals, HoDs and teachers in interpreting C2005 guidelines and school level designing, implementing and evaluating C2005 accurately (see chapter 3).
- Review literature on instructional leadership and C2005 development quality assurance, in order to establish the strengths and limitations of such quality assurance measures in addressing the problems of instructional leaders at school and classroom levels (see chapter 4).
- Design interview schedules/questions for a sample of officials of the DoE and instructional leaders at school level in order to explore the experiences, understanding and meanings that instructional leadership in C2005 (grades 7-9), give to the difficulties that they experience (see chapter 5).
- Use the information from literature sources and empirical research conclusions to suggest how instructional leadership and C2005 development difficulties could be preempted and solved. Contingently the research results will further suggest how to strengthen existing

quality assurance measures and formulate a framework, a guide and point of reference for strategic and collaborative institutional and a culture based quality assurance framework for the cohesive delivery of C2005 (see chapter 7, section 7.7, Fig 7.1).

To achieve these objectives the next section shows what theoretical framework has been adopted and how the study area has been delineated.

1.7 Constructivist framework of the study

This research is undertaken from a constructivist framework. Guba and Lincoln in Shaw (1999:39) articulated the point of reference for a similar study when they explained that "relativism and constructivism hang together. Reality is subjective and is created by people in the context of trying to make sense of their surroundings". In relation to this study, the researcher interprets the primary literature about SA teachers as indicating that instructional leaders make meaning of their experiences of C2005 in their daily attempts to solve their teaching problems. In other words teachers construct their reality (Lincoln and Guba, 2006:195, 495-6). From this constructivist perspective, solutions to the difficulties that instructional leaders experience in C2005, will be found in understanding the meanings that implementers make. The meanings represent their reality and guide their habits and cultural functioning. Therefore manipulating (reconstructing) understanding and meanings will guide new habits and cultural functioning. The next section establishes the scope of the research into instructional leaders' practice.

1.8 Demarcation of the study area

The study area was delineated into conceptual and geographical areas. In this section both of these areas will be discussed to show how instructional leaders engage in interactions in the areas. The research will highlight the difficulties that the teachers experience in the development of C2005 at the senior phase (grades 7-9) and its quality assurance.

1.8.1 **Conceptual delimitation of the study area**

Leedy and Ormrod (2005:55) on delimiting the problem area, indicate that what will be included in the study is stated in the problem. They also contend that as part of delimiting the problem area, the researcher must state what will not be included. The researcher of this project will investigate what instructional leaders find easy and what they find difficult in their translation of C2005 guidelines to classroom programmes and how they understand the difficulties. The study further inquires into what quality assurance framework instructional leaders think could address the difficulties in the development of C2005.

Factors that will be discussed include the context within which C2005 guidelines are translated into school programmes, the inputs, processes and outputs of instructional leaders' curriculation and quality assurance. What the study will not include are all issues that fall outside the instructional leaders' functions, stages of curriculum development, the difficulties that arise in assuring quality and a search for a framework that would address the problems in the implementation of C2005.

The research investigates instructional leaders' difficulties as they relate to structures that drive C2005 such as: The DoE, the Provincial (Free State Department of Education [FSDoE]) and the directorates of Curriculum Development and Quality Assurance on instructional leaders. Structures that have assured quality and set standards for all education provision in SA are: SAQA, ETQAs, NSBs, SGBs and the NQF. The NQF is included as a framework for recognition of qualifications and requirements for a certain quality of work from instructional leaders if their work is to be certificated. Additional education quality assurance structures are: the IQMS and its agencies DAS, WSE and Performance Measurement system (PMS), the South African Council of Teachers (SACE). Finally there are personnel

such as the Learning Facilitators (LFs) and their stated functions, principals, HoDs and teachers.

Primary literature study on instructional leadership suggests that the difficulties that instructional leaders experience in translating C2005 guidelines to practice can arise anywhere due to limited ability of implementers. The difficulties can arise when the guidelines are designed as transformational curriculum or when guidelines are implemented and reviewed at school level (see sections 3.5.3 & 3.5.6). Morrison (1998:16) notes in regard to a similar process of change and capacity that, "the success of educational change depends very much on the values of confidence and ability with which the school officials and their staff implement it".

As the subject of the research is made up of social subjective values such as competence and understanding of instructional leaders and their difficulties, qualitative research has been selected as the most appropriate research design to study the phenomena (see section 5.3.2). Under qualitative research, phenomenology and inductive reasoning were adopted because the researcher aimed to gather information from teachers about their experiences, analyse the information and formulate patterns that could give an insight into the nature of instructional leaders' difficulties and clarify them more (Leedy & Ormrod, 2005:133,134,139). Shaw (1999:39) contends that each study that clarifies issues is worthwhile, as it deepens understanding and facilitates a solution. Shaw's (1999: 39) contention gives strength to this study because it would clarify how instructional leaders think and understand their difficulties in the implementation of C2005 and its quality assurance, through studying a sample of teachers from some schools in the Free State.

1.8.2 **Geographical delimitation of the study area**

The research was conducted in two administrative districts, namely Motheo and Thabo Mofutsanyana. The study focused on the two districts because they were closer to the researcher. The researcher was based in Botshabelo, Maseru and Ladybrand when the study was undertaken. Money and time considerations limited the inclusion of other districts.

There are 900 secondary schools in the Free State that have up to GET grades 7 to 9. The universal target population of the study was approximately 530 of these schools that are public schools located in the two districts from which the sample was drawn namely, Motheo and Thabo Mofutsanyana (FSDoE, 2005). Other details of the actual breakdown of the sample are contained in chapter 5 (see section 5.4).

The next section looks at the research methodology and specific methods that were identified as the most practical and the best choice in the circumstances of limited resources and time.

1.9 Research Methodology

Methodology is a set of all strategies and specific methods that could be chosen to deal with specific issues in the research (Mouton, 2001:55-56). This section deals with the research design and methods that the researcher considered to be most appropriate to investigate experiences, opinions and difficulties of instructional leaders.

1.9.1 **Research design and field investigation**

Of the two main types of research, basic and applied, the investigation into instructional leadership difficulties in interpreting and understanding C2005 policy guidelines as they are intended by the DoE designers at macro, meso and micro levels, falls into empirical or applied research (Gay, 1992:19).

The research is an exploratory investigation and diagnosis of some of the thoughts, opinions, interpretations, meanings, understanding of the difficulties that instructional leaders experiences in the development of C2005 at classroom level. It deals with social facts that are qualitative in nature; hence the study falls into the qualitative paradigm of research (Leedy & Ormrod, 2005:134 -135, 138). Naicker (1999:92) and Coleman (2004:18) define a paradigm as "a framework for identifying, explaining, and solving problems. Paradigm signifies an all encompassing framework for understanding and interpreting the world and all one's experiences according to the way one was taught or trained".

Furthermore, the study is located in the tradition of phenomenological method that is a section of qualitative research, because the study aims at understanding the phenomenon (Tesch [1990, 1994] cited by Creswell, 1998:53 and Leedy & Ormrod, 2005:139). In this case the phenomenon is instructional leadership, lived experience of interpreting C2005 policy and guidelines and implementing them as learner programmes at school (more details of phenomenology are given in section 5.3.2).

Within this method, interview schedules were developed as the main instruments of measurement and research tools to be used for gathering data about understanding the thoughts, understanding and meanings of the difficulties which implementers of C2005 experience. While there is no intention in this writing to give a detailed account of the advantages of interviews in establishing the feelings of participants in the research, Coleman and Briggs (2002:143) and Henning (2004:42, 45, 52) provide such an account. Interviews were chosen in this research because they are the most direct means of finding out peoples' experiences and other views as this study intends to do.

To a certain extent, the study is admittedly a hybrid, as it takes advantage of different methods of data collection such as literature review, interviews and field notes. In any case, many studies may tend to be hybrids, to varying degrees, as they employ whatever method provides more information and knowledge about a chosen research issue (Henning, 2004:38).

The study is inductive and implies development of a theory that is grounded in the experiences of C2005 designers and implementers (Creswell, 1998:55-58) as the next section demonstrates.

1.9.2 **Adoption of inductive approach in the study**

The study will predominantly follow the inductive tradition of deriving a quality assurance framework from the field as the main source of data (Gay, 1992:19 –25). Hall and Hall (1996:34) argue that joining induction and deduction in a circular or interactive process of a convincing explanation could later be used to develop a theory.

1.9.3 **Sampling techniques adopted in the study**

The target population for this study specifically included principals, subject and department heads and teachers in public schools as well as the DoE officials. All these are involved in the implementation of C2005. The views of the DoE acted as a sounding board to the views of the instructional leaders. Comparing the two views would indicate whether the practitioners view the nature and causes of difficulties in the interpretation and implementation of C2005 in the same way. It is acknowledged in the research that because of the constraints imposed on the study by limited resources the views gathered will only come from a sample and not the whole population.

The purposive sampling technique was adopted in the study. In this method a sample is drawn to ensure that the target population of officials and

instructional leaders who have participated in the design C2005 and teaching in public schools are identified before drawing a sample (Baker, 2003:191-192; Coleman & Briggs, 2002:101-102). This is done because the questions asked are specific to the groups of officials and their roles in C2005 development.

Leedy and Ormrod (2005:206) assert that purposive sampling is appropriate where people are chosen for a specific purpose. Officials of the DoE, principals, HoDs and teachers were chosen for the sample of this research because they fulfilled the precondition of having at least one to two years experience in the implementation of C2005.

A sample of nine (9) schools was drawn from the following locations in the Free State: Bloemfontein, Botshabelo, Thaba Nchu, Ladybrand, Tweespruit, Clocolan and Ficksburg. These areas are located in two educational administrative districts of the Department of Education, Motheo and Thabo Mofutsanyana districts. Other details of sampling are given in sections 5.4 and 5.4.3.

The research problem, which encompasses the views of instructional leaders about the difficulties that they have with C2005, dictated that schools which would be included in the study, would have implemented C2005 for at least one year from 2000. This ensured that the schools had some experience with C2005. In the same way, instructional leaders of schools that were included in the sample in the Free State were selected with the understanding that they had received similar training in OBE.

The size of the final sample was 10 teachers (identified as level one teachers by the DoE), 5 HoDs, 5 principals and 3 DoE officials. In all there were 23 participants. One official of the DoE and two (2) teachers were interviewed to pilot the questions that had been designed for the study and

to give the questions validity. To ensure confidentiality of respondents, schools were given designations N1, N2, N3 up to N9. The details of how the interviews and the procedure were followed are presented in section 5.5.2 and 5.5.3.

1.9.4 **Execution of fieldwork**

In the field all sample participants were asked to address and discuss questions that were based on the objectives of the study (see section 1.6).

The questions were piloted to ascertain that they would provide the answers to the stated objectives. Piloting the questions also tested the validity and reliability of the questions to achieve the aim that the research stated in section 1.5. The final interviews were administered in April, May and June 2006, as the DoE requires that research visits to schools should not be made in the fourth term when examinations are close or in progress. Some of these conditions for approval of the research project can be seen in Appendix B.

Finally responses from the field were analysed qualitatively. The analyses were interpreted and research questions answered. Answers led the researcher to draw conclusions. From the conclusions, recommendations were made concerning the solutions to instructional leaders' difficulties and the quality assurance framework that could be employed to promote optimal implementation of C2005 (see chapter 7, section 7.7, Fig 7.1).

1.10 Value of the research

The research has practical value because it was initiated to address real existing difficulties that the instructional leaders experience in their curriculum development in C2005 at school level. The research also approached the difficulties from an alternative quality assurance perspective (see section 1.5). Another anticipated value of the study is that it

aggregates previous relevant studies on the issues and problems surrounding instructional leadership and synthesises the findings. The study has the potential to help the national and provincial officials who are responsible for curriculum change to make informed decisions in the General Education and Training (GET) Band, grades 7-9 on the implementation of the NCS. When the findings of the research are presented they provide those who participated in the research, including instructional leaders at school level, the opportunity to use the findings to strengthen their participation in curriculum development (Henning, 2004: 22).

1.11 Validity and Reliability of the research instruments and procedure

Validity of the instrument is the extent to which it measures what it claims to measure (Leedy & Ormrod, 2005:92-93). Reliability refers to is replicability of the measurement – the characteristic of an instrument to measure an attribute several times with the same outcome on all occasions. The instrument developed for this study was to quantify and find reasons for the ease and difficulties faced by instructional leaders in translating C2005 policy and guidelines into practice at school level. The instrument was developed from this purpose and hence literature on the purpose and piloting of the questions in the instrument gave it validity. Finally the study can only claim validity and reliability on the grounds that it has been conducted with utmost care and thought to achieve precision through the rigor of scientific technique and research ethical codes of conduct. More details of validity and reliability are presented in chapter 5.

An extensive literature review was conducted to derive appropriate interview questions. The questions were intended to explore the difficulties faced by instructional leaders in their development of C2005 at school level (Coleman et al, 2002:268-269). The phenomenon is studied against the problem

context and processes of translating C2005 policy and guidelines to practice for which the research is seeking solutions.

1.12 The research plan and layout of the research report

In chapter one, the background of the difficulties that instructional leaders experience in interpreting and implementing C2005 policy and guidelines as intended at classroom level, is presented. The research problem is framed and justified and research procedure stated. Chapter two is the examination of literature sources on instructional leadership and the difficulties that instructional leaders experience in implementing C2005. Patterns are highlighted and appropriate questions are formulated. Instructional leaders' understanding of C2005, discharge of their new roles of facilitation, mentoring, and reflective implementers, among others, are assessed and the difficulties highlighted**.**

In chapter three literature sources are reviewed in order to establish the nature and forms of the difficulties that instructional leaders experience in translating C2005 guidelines to classroom programmes for the GET at the senior phase (grades 7-9). In chapter 4 quality assurance in instructional leadership and curriculum development of C2005 are discussed. In this chapter the official quality assurance structures of the DoE are evaluated to determine the limitations of the structures and to determine how quality assurance of C2005 could be strengthened and renewed.

Chapter 5 is a presentation of methodology and elaboration on the validity and reliability of the indicators and measures that have been chosen for this study. Chapter 5 relates how data was captured. Details of the analysis and interpretation of data are given in chapter 6. Chapter 7 presents conclusions, findings, recommendations, strengths and limitations of the study. Strategies to solve the difficulties that instructional leaders experience in the implementation of C2005 guidelines at school and

classroom levels are stated for teachers in chapter 7. Finally an alternative quality assurance framework that has an instructional leadership orientation is presented towards the end (see chapter 7, section 7.7, Fig. 7.1).

1.13 Clarification of recurrent terms and concepts

1.13.1 **Translation of C2005 guidelines to practice**

The DoE (2003:2) regards translation of guidelines to practice as the use of C2005 learning areas statement in developing learning programmes, work schedules and lesson plans (see chapter 3).

1.13.2 **Curriculum 2005 (C2005)**

C2005 is the title of the OBE driven curriculum in SA. The full name of Curriculum 2005 was derived from the date by which the DoE intended to complete the implementation of the new curriculum up to grade 12 (by 2005). The revised version of C2005 was called Revised New Curriculum Statement (RNCS). From 2006 it is simply called the National Curriculum Statement [NCS]). The NCS is strengthened and streamlined C2005 (DoE, 2002:134). C2005 is the basis, distinguishing concept/title on which improvements have been made (DoE, 2003). It remains a constant in official documents. It is used with this understanding in this research (see chapter 3).

1.13.3 **Curriculum development**

Curriculum development means designing, dissemination, implementing and evaluating what is taught (Carl, 1995:48). These indicators are also used interchangeably with context, input, process and output by the DoE (2005:7) (see chapter 3).

1.13.4 **Instructional leadership**

Instructional leadership refers to principals, HoDs and teachers in their roles as guides in teaching and learning. The three groups plan, design and implement curriculum and evaluate it as leaders at school level.

1.13.5 **Outcomes-Based Education (OBE)**

OBE means “clearly focusing and organising everything in an education system, around what is essential for all learners to be able to do successfully at the end of their learning experiences. Learning programmes start with outcomes, followed by organisation of curriculum, instruction and assessment to make sure that desired learning is ultimately achieved” (Boschee and Baron, 1993:1-2; Spady, 1994:1) (see chapter 3).

1.13.6 **Quality Assurance**

Quality Assurance is a process of taking all necessary measures to see that the goods or services such as education that are produced in an organisation (like a school) meet the customers’ needs and expectations (Doherty, 1994:11) (see chapter 4).

1.14 Conclusion

In chapter one, the problem of this research is stated as the difficulties that instructional leaders face in effectively translating C2005 policy statements of intent, guidelines into programmes to successfully achieve desirable outcomes in the classroom. The instructional and curriculum development problems are linked to the bigger problem of the gap between C2005 policy and practice. The problem has been framed in a researchable way and motivated with questions that guide the research. The problem has been presented in the form of objectives. Issues of sampling, methods of data collection and analysis have been introduced. In chapter one the motive for undertaking the research and methods that are adopted are presented. Chapter one is linked up with all chapters through the plan and the layout of the research project (see section 1.12). Following the internal logic of the research and its product, chapter two executes the research plan and builds a literature basis through examination of instructional leadership in C2005. Chapter three advances the study through the examination of Curriculum Development in C2005. Literature review on the topic headings is concluded with chapter four that examines Quality Assurance. Chapter five presents

appropriate research methods that supported by literature and are brought to bear on the practical investigation of the ease and difficulties that instructional leaders experience in the implementation of C2005. In chapter six qualitative research data derived from the field and analysed. Chapter seven presents conclusions and recommendations. From the summary of the research that is presented in chapter one, chapter two takes over and proceeds to the next stage of the research; reviewing literature on Instructional Leadership, Curriculum Development and Quality Assurance.

CHAPTER 2

INSTRUCTIONAL LEADERSHIP

2.1 Introduction

In this chapter literature sources on instructional leadership of principals, heads of departments and teachers in education generally and in C2005 in particular at the GET band, grades 7 to 9 are reviewed. The aim of literature review in this chapter is to determine the ease and difficulties with which instructional leaders have translated C2005 guidelines into programmes (curriculum development) for implementation at school and classroom (instructional leadership). Ramusi (2002:43) magnified the research question that motivated this objective by concluding that, “There is a huge dichotomy between policy and implementation of C2005” (see section 1.4). The acronym C2005 is retained in this writing because it is still used in official documents (see section 1.13.2). From a holistic point of view, areas within which instructional leadership is examined to determine the nature and level of the difficulties include its perception and definition, philosophical values that justify certain instructional leadership and the role of instructional leadership in the transformation of the whole education system of SA. Other details that are examined are the leaders themselves in different roles of designing, dissemination, implementing and evaluation of C2005 (Carl, 1995:48; Gravett & Geyser, 2004:147).

For the indicators, Harley, Bertram and Mattson (1999:4-6) also suggest analysis of instructional leaders’ functions under the foundational (knowledge), practical and reflexive competencies in implementing C2005. The Government and the DoE have preferred using context, inputs, process and outputs (FSDoE, 2005:7). One official of the FSDoE said that the DoE

has used the indicators to bring uniformity in perception and action in education and instruction.

2.2 Perceptions of instruction

The interface between the DoE and instructional leaders' perception, definition, understanding, implementation and reflection of instruction at school level is marked by harmonious work in some instances but results in difficulties in other instances.

2.2.1 **Definitions of the concept instruction**

In the 1980s Romiszowski (1981:4; 1988:5) defined instruction generally as "a goal directed teaching process that is more or less pre-planned." Evans, Evans, Gable, and Schmit (1991:4) define instructional leadership as "blending behaviours of environmental variables as inputs to produce educational conditions that are conducive to reward and result in maximising the amount of learning accomplished in an efficient manner". Killen (1998:2) extends the definition to a more descriptive and academically oriented definition and sees, "instruction as a class expository approach to delivering academic content in a structured format. Instruction is directing activities of learners and maintaining focus on academic achievement".

More recently Smith (2002:5) presented a broader definition that is more specific to education. The definition included "learning objectives, subject materials, equipment, methodology, evaluation mechanisms and facilities in an instructional plan whose presentation enables learners to make progress towards specified educational goals".

Further literature study suggests that up to the 1980s, the term instruction had been used exclusively in manufacturing industries and vocational pursuits, to mean providing information for learning skills (Kelly, 1987:27). However, from the 1980s onwards instruction gained popular use in

education in countries such as the United States of America, Australia and Canada. In SA instruction is gaining popular use in the context of the on going process of transforming the SA education to OBE and bridging the gap between academic and vocational knowledge by the NQF (Curriculum 2005, 1997:5; Jacobs at al., 2004:2).

In the SA context Chisholm (2001:8) and Spady (1994:6,165-167) define instruction as a process of delivering outcomes by instructional leaders, ensuring that what are identified as exit outcomes of significance are actually learned at the end of a learning programme/instructional experience. Boschee and Baron (1993:3) define instruction in a similar way in the context of OBE in the United States of America.

According to Chisholm (2001:7), the SAQA, the NQF and the national DoE adapted Spady's understanding of instruction as an official position. The NQF emphasises integration of education and training – mental knowledge and skills in the instructional and learning processes and outcomes (Chisholm, 2001:7; Harley, Bertram & Mattson, 1999:16).

Considering the different definitions of instruction Chisholm (2001: 8) argues that the concept of outcomes alongside the definition of instruction implies a paradigm shift. Within C2005 Chisholm (2001:8) synthesises instruction to mean a process of "defining, organising, focusing, and directing all aspects of a teaching system in relation to what we want all learners to demonstrate successfully when they exit the system". However Chisholm (2001:8) and Jacobs et al (2004:2) caution that it is important that all those who are involved in C2005 as a policy strategy of change and a transformational curriculum share meanings of its practices. Yet according to Chisholm (2001:13) up to 2001 instructional leaders did not share the meanings of C2005 terminology and conceptual understanding. Instructional leaders found that the terminology used in C2005 was difficult and created

implementation difficulties for them. Therefore the next sub section holistically clarifies instructional leadership, its role in translating C2005 guidelines into classroom programmes and the meanings that they give to their experiences.

2.2.2 **Clarifying Instructional Leadership**

Bush (2003:15-16) defines instructional leadership as "focusing influence in the direction of learning by learners as a result of teachers' professional organisation of learned material". The context in which the competence of leaders such as the principals, HoDs and teachers increases is an important factor. Bush (2003:15) acknowledged that while the perspective in the definition of instructional leadership was new in 2003, some of the earlier theoretical perspectives on instructional leadership were still valid and gave an insight into the history of leadership. For example, one perspective focused on personal traits of leaders (such as principals and deputies).

In practice, such traits as self-confidence, flexibility, consistency, and objectivity, high level of motivation, being a good communicator, problem solver and decision maker were thought to be central to effective leaders (Squelch & Lemmer, 1994:3). These traits are still desirable in an instructional leader (principal, HoD, teacher) who is to competently demonstrate achievement of critical outcomes of C2005 (DoE, 2000:4). In this regard Squelch & Lemmer (1994:3) assert that effective instructional leaders (in this case referring to principals and deputies):

- encourage staff;
- motivate staff;
- are prepared to take risks;
- are able to cope under pressure;
- are able to take criticism;
- are accountable for mistakes and take responsibility;
- are visible in the school;

- are friendly and approachable;
- are good at making quick decisions; and
- are able to deal with conflict.

A democratic instructional leader who is adventurous, creative and accountable in terms of leadership culture is described by attributes and skills such as encouraging those under their supervision, friendly, approachable and able to take criticism. Feedback on the success of instructional leaders described above completes the cycle of an instructional system and establishment of school and instructional leadership culture (Marzano, Waters & McNulty, 2005:55). Yet a question arises as to what ease and difficulties principals, HoDs and teachers feel they have experienced in the clarification of instructional leadership, understanding the philosophy that underpin instructional leadership and assuming an appropriate role that they are expected to play in the implementation of C2005.

2.3 Philosophical underpinnings of instructional leadership

Ornstein and Hunkins (1998:31-32) state that philosophy is a set of fundamental propositions of what we think ought to prevail in many issues for such issues to be just, true and good. Furthermore Ornstein and Hunkins (1998:31-32) state that philosophy is a body of systems of values, beliefs and perceptions in our social groups and influences our goals. Philosophical values, advocated by the school and its officials, influence the goals, aims, content and organisation of its curriculum, its implementation and instruction (Ornstein & Hankins, 1998:31-32).

Higgs (1997:100) revised the philosophy of education in SA and concurs with Ornstein and Hunkins that philosophy highlights and legitimates educational choices and determines the direction of education. Higgs (1997: 100) adds the perception, that the function of philosophy generates

support for instructional systems, their aims, methods and practice (teaching in traditional terms).

Furthermore, Higgs (1997:100) concludes that the philosophical discourse in SA was profoundly shaped by modernist fundamental pedagogy, which was a dominant discourse in the philosophy of education before 1990. Higgs (1997:100) contrasts fundamental pedagogy with constructivist philosophy that underlies C2005 and argues that constructionism leads to a different understanding and justification of education and learning from fundamental pedagogy. Constructivist philosophy sees knowledge as a people constructed process that is subjective and pluralistic (Lambert et al., 1998:18).

As instructional leaders in C2005 are required to make a transition from traditional and selective curriculum that was justified by fundamental pedagogy to a curriculum that is supported by constructivism, Higgs (1997:110) and Coleman et al. (2003:27-28) argue that SA should accept the pluralistic problem centered approach to philosophy. Higgs (1997:110) sees constructivist critical or problem centered foundation as one way to the development of democratic ethos and culture of human rights. Higgs (1997:110) also sees critical discourse contributing to educational programmes and practices conducive to experimental thinking and support for the national vision and policies. In this regard Parker (2003:24) concluded that Higgs subscribes to the development of an (South) African philosophy as a key element in the transformation of education in SA.

Moreover, Dekker and Van Schalkwyk (1995:464) justify the multiplicity of philosophies and claim that the proliferation of philosophies in SA is justified by the heterogeneity of the South African society. Dekker and Van Schalkwyk (1995:464) contend that up to the time of writing the research, education had been influenced by the following philosophies at different

historical times: Christianity, Liberalism, neo-Marxism and Ubuntu (humanism). Dekker and Van Schalkwyk (1995:464-5) argue that these philosophical positions have been included in policy documents and government directives, reflecting the government officials' philosophical position. The DoE subscription to the multiplicity of philosophies prompts the question: Has the DoE taken instructional leaders on board to adopt the government philosophical position with regard to the development of C2005, if they have, with what ease and difficulty are they doing so?

Van der Westhuizen (2003:125) differs with the foregoing historical and theoretical description of SA philosophy and adopts an organisational perspective. He breaks down the educational organisation philosophy into convictions, missions, goals, ethos, norms, values and hidden curriculum among others. Van der Westhuizen argues that convictions, mission and others are related to teachers and determine how teachers behave towards learners in accordance with the convictions that teachers hold about learners. Furthermore convictions of those involved in the school ultimately take shape as the philosophy of the school (Van der Westhuizen, 2003:125). These convictions determine instruction for teachers.

In SA OBE brings philosophical assumptions and convictions that education ought to be; a life long learning experience, learner centered instruction, progressive, inclusive and of high quality for all (Chisholm, 2001:9; DoE: 2004). These are only a few of the philosophical values that determine the type of instructional leadership that principals, HoDs and teachers have to provide in C2005. Boschee and Baron (1993:6) and Spady (1994:24) confirm that these were the values that teachers were to change in the instruction in the American education system when some states adopted the OBE paradigm in the early 1980s.

Spady (1994: 8) further contends that in SA the OBE paradigm can be expected to influence the way in which instructional leaders view C2005 and implement it consistently. Spady asserts that the methods of OBE are based on 3 main assumptions, viz:

- All learners can learn successfully, but not on the same day and in the same way.
- Successful learning promotes more successful learning.
- Schools control the conditions that directly affect successful school learning.

The OBE viewpoint regarding learning is that what is learnt and whether learners learn it successfully, is more important than when and how they learn it (Spady, 1994:8). C2005 has adopted these central OBE philosophical views, which prescribe demonstrable knowledge by learners following successful instruction. Chisholm (2001:9-10) recorded that instructional leaders have difficulties in understanding and implementing these values in class. Consequently Chisholm (2001:9-10) and Hindle (Lewin, Samuel & Sayad, 2003:333) recommended initiatives that would deepen instructional leaders' understanding of the values that underlie C2005.

Notwithstanding the values that underlie OBE, the government instituted a Working Group on values in education and the group has proposed values such as equity, tolerance, multilingualism, openness, accountability and honour as priority values of the SA society of the future (DoE:2000). A question that comes to mind is; with what ease and difficulty are instructional leaders dealing with this kind of values at school level?

Moreover, closer to instructional leaders and classrooms, Rhodes and Roux (2004:25-27) propose an addition of analytical values that could be derived from the eight learning areas of C2005. Rhodes and Roux (2004:25-27)

contend that eight learning areas of concern for C2005 at GET band could be screened through religion, ideology, politics and practices, aesthetics and norms of appreciation, beliefs, humanitarian, ethics, morals and culture of SA to obtain the grounding for C2005 (Rhodes & Roux, 2004:25-27).

For the same grounding of C2005, Van der Westhuizen (2003:10-15) adopts a systems approach to the SA education. In this approach the values of lifelong learning, principles of access, redress, integration, transparency, quality assurance, flexibility, portability and articulation that are embodied in the NQF, are emphasised. The emphasis includes quality assurance systems such as ETQAs, NSBs among others. However while C2005 designers easily write these values to be included in instruction, the difficulty is that teachers do not yet have capacity to adopt the values practically in class (Murugan, 2002:136-7).

Nevertheless in its latest version, as the National Curriculum Statement (NCS), C2005 embodies a summary of values that are reflected in the assumptions about the SA society of the future and the curriculum at the GET band (GCIS, 2002:196). The official view is that priority values which should be included in the NCS are; transformation to a democratic SA society, achievement of social justice, OBE, high level of skills and knowledge for all, clarity, accessibility, progression and integration (Paine, 2002:260).

However, to implement them the DoE has again preferred a centralised “top down” approach of translating the values that underlie C2005 through policy documents to the classroom and instructional implementation (Kgobe, 2001:18). These values and assumptions about quality C2005 instruction have been promoted through advocacies. Even though instructional leaders have not participated in the discussion of C2005 guidelines, the DoE has invited a few teachers to nominally represent the whole body of instructional

leaders in order to legitimise the process of implementing C2005 (Chisholm, Motala & Vally, 2003:375). Would teachers feel that representation like that is participation?

In order for teachers to participate meaningfully though, they need to develop long term professional strategic skills, such as learning to learn and promoting a constructivist concept of a school as a learning organisation and teachers as drivers of such a school (Moloi, 2002:6-7; van der Westhuizen, 2003:307).

The advantage of developing a learning school, is that the ideas of a learning school, would fit in well with organisational and systems thinking of problem solving strategies and values. The concepts of a system and an organisation are in turn found important in the formation of a vision of excellence and the school of the future (Moloi, 2002:7). It is within the organisation and systems approach that the new educational culture of the SA of the future, which suits OBE driven C2005 could be understood better and implemented (Chisholm, 2001:8).

These changes of values include a change in the production of knowledge and raise the question; what are the difficulties that instructional leaders experience in adopting the legislated values of democracy, progression, integration and others that form the vision of transformation of the future SA in practice in the classroom as they attempt to deliver a quality C2005? (see section 1.4 and 1.6). The next section examines the changed conditions of knowledge production and how they impact on instructional leadership.

2.4 Change in the conditions of knowledge production

When knowledge and its systems change there is a high potential of problems arising from many areas. Steyn (2003:181) in his definition synthesises knowledge as information that has been processed through

learning. Knowledge becomes a personalised store of cognitive structures in the minds of individuals, learners, determining their understanding and actions.

Steyn (2003:181) and Meyer and Rourke (2003:45) further note that there has been a shift in the way organisations use knowledge. Organisational thinking strategies are no longer preoccupied with dissemination of information and knowledge. They now think more of using information and knowledge creatively. The DoE have also followed this trend in their transfer of C2005 from policy to guidelines. As a result of these changes in the workplace, education and instruction have to be approached differently.

Instructional leaders have to understand the nature, creation and transfer of Mode 2 knowledge (Kraak in Jansen & Christie, 1999:50). Specifically because this understanding would help them to internalise the process of establishing outcomes of significance, programming, course design, unit design, lesson plans and facilitation of learning and assessment (Killen & Spady, 1999:200).

Since knowledge is embedded in the human experience, Steyn (2003:181) foregrounds relevant knowledge and skills of education and training (content and process) in C2005, on the transformation of the work place by the forces of globalisation and desire for economic competitive advantage by nations in the twenty first century. Steyn (2003:181) states that the knowledge era means that learners will have to be prepared for occupations requiring higher levels of knowledge and skills. It is the duty of teachers to help learners to acquire and develop demonstrable knowledge and competence.

Through Steyn's (2003:181) models of knowledge (in this section, Figures 2.1, 2.2), C2005 knowledge and skills are seen as personalised tacit

knowledge that is related to curriculum and individual qualities required in a transformed work place. The officials of the DoE and instructional leaders have corporate responsibility to understand their role in the education system as human resources, knowledge creators and knowledge managers. The DoE have to understand that instructional leaders also produce knowledge that should be managed with them in a collaborative and collegial manner. According to Steyn (2003:181) knowledge is created through the process of self-reflection, socialising and sharing internal tacit knowledge with others and varied media.

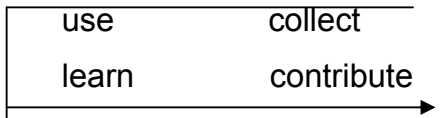
The type of knowledge that is in step with the current economic and technological demands has been called Mode 2 knowledge. Technically Mode 2 knowledge is very compatible with the OBE approach to education that has been envisaged by the SA government, and supported by political, academic and theoretical arguments recorded by academics such as Kraak (Jansen and Christie, 1999:50). Kraak (Jansen & Christie, 1999:50) argues that a paradigm shift to C2005 in SA is a shift from traditional objectives based knowledge that is now referred to as Mode 1 knowledge to Mode 2 knowledge. Kraak (Jansen & Christie, 1999:50) regards Mode 2 knowledge as information age knowledge that is based on competence, multidisciplinary approach and problem solving orientation. Baijnath, Maimela, and Singh (2001:121) support the argument, and insist that instructional leaders have to understand the shift to Mode 2 knowledge in their preparation for designing instruction to facilitate acquisition of knowledge in C2005.

Kraak (Baijnath et al., 2001:121) is convinced that the OBE driven C2005 is predominantly Mode 2 knowledge. Kraak proceeds to point out that the implication of the emergence of Mode 2 knowledge production is that education providers such as principals, subject heads, heads of departments and teachers have to develop their foundational and reflective

competences to reach the level of understanding that includes Mode 2 knowledge.

Mode 2 Knowledge can be evaluated through its characteristics such as multi disciplinary and practical, problem solving, competence and emphasis on knowledge as a characteristic. Steyn (2003:181) describes the process of knowledge management as an integrated approach to identify, manage, share and capitalise on the technical know-how experience and intellectual capital of people in an organisation. He sees knowledge management as a tool with which learning is stimulated and knowledge is managed through steps or stages. Steyn (2003:181) again synthesises the four stages as: collection of information for use; using knowledge to create value; learning from what they create; feeding the knowledge back into the system or organisation. See Figure 2.1 below.

Fig 2.1 Transformation of information to knowledge



(Steyn, 2003:182)

Another model of knowledge management that Steyn adopted from Nanaka and Takeuchi is presented in table 2.2 below. In this model, Nanaka and Takeuchi (Steyn, 2003:182) identify explicit knowledge as the first stage of processing information into knowledge. From then on, tacit knowledge is created as a personally stored knowledge through internalisation.

Fig 2.2 Construction of knowledge in its different phases

		To	
		Tacit	Explicit
From	Tacit	Socialisation, mentoring training, exchange of ideas	Externalisation, dialogue, reflection among staff
	Explicit	Internalisation, learning by doing	Combination, education training

(Steyn, 2003:182)

The emphasis that the DoE and instructional leaders put on the need for new assumptions, understanding and examination of knowledge that is related to C2005 is inspired by the choice of OBE based C2005 by the SA government. Moreover, South African Qualifications Authority (SAQA) obliges education providers to conform to certain outcomes such as, critical and developmental outcomes and methods of teaching like group and project work, life roles and others (Killen & Spady, 1999:200).

The outcomes, skills, knowledge, attitudes and values that are to be included in all instruction and learning at school are obtained through varied, programmed and paced instruction. It is because of the type of knowledge, varied methods of assisting learners to construct knowledge and assessment that teachers also have to adjust, construct and use their own skills and knowledge that conforms to C2005 requirements.

Besides, national and provincial political decision makers and provincial implementers of policy decisions could negotiate and align instructional leaders' values, beliefs and preferences with implementation expectations placed on instructional leaders of C2005. Such collaboration and alignment would ensure effective and permanent cultural change to quality delivery of C2005 (Harley et al., 1999:4-5). The question is: With what ease and difficulties would instructional leadership develop from Mode 1 to Mode 2 knowledge? The next section examines the holistic vision of transformation, the role that the vision would prescribe for instructional leadership and implications.

2.5 The vision of transformation and instructional leadership

In a research that included a focus on the vision of transformation of school leadership in the Free State, in the wake of implementation of C2005 in grade one in 1998, Singh (2000:111-112) concluded that development of a shared vision that is going on among instructional leaders is very important.

However, Singh (2000:111-112) also noted that a systemic paradigm shift, like the one effected by moving away from segregated apartheid education to C2005 and inclusive education require a fundamental change from an old order to a new order.

In this regard, business and industry have advocated a similar vision and cultural change that have in turn changed leadership and management culture to Total Quality Management (TQM). In the case of businesses, change has usually begun with development of a team working towards a vision, values and skills that are shared by the group and the individual in the organisation (Doherty, 1994:22).

From an organisation and a systems analysis perspective, Senge (Moloi, 2002:7) identifies three areas that are very basic and should change to transform a school into a learning organisation. They are: vision, mission and goals; teaching and learning methods; materials and physical resources. However Davidoff and Lazarus (1997:21) see vision and mission as the most important factors of the organisation leadership and management tasks that also give an organisation identity. Doherty (1994:22) also singles out the concepts of vision and culture as the most useful because of their breadth in addressing the systemic change of aspects of the process and product of education such as the culture of instructional leadership within C2005.

The national vision associated with C2005 is encapsulated in the DoE Vision Statement which states: “Our vision is of a SA in which all our people have access to lifelong learning, education and training opportunities that will in turn contribute towards building a peaceful, prosperous and democratic society” (GCIS, 2003:189).

According to Harley et al. (1999:14) principals, HoDs, and teachers' functions to achieve this vision are officially driven by the following legislative documents: Committee on Teacher Education Policy (COTEP), SA Council for Teachers (SACE), Education Labour Relations Council (ELRC) and National Department of Education (NDoE). Harley et al (1999:14, 19) present a summary of dates, purposes and responsible authorities in charge of these documents in a table form in section 2.7.2.

In contradiction to these legislated directives and institutions, Macbeath and Mortimore (2001:197) assert that teachers' beliefs and values underpin what they do in practice. Driving change and action with policy and directives without change of culture of work of instructional leaders is bound to create difficulties. The preparedness of teachers to engage in change flows from their belief system, implying their culture. Morrison (1998:15) also states in this regard that, "part of successful management of change is to identify participants' opinions, perceptions, attitudes, values, beliefs, culture and to ensure that participants are fully informed".

Notwithstanding these different views of what could motivate teachers to pursue a vision, literature evidence suggests that principals are responsible for creating a school change in the vision and culture of the school as well as implementing them, thus in many cases changing instructional leaders' beliefs (Coleman et al., 2003:72-73).

From a micro level perspective, Thomson (2002:211-212) argues that it is better to change the vision and the attitudes of one person, more than an organisation, because such change is necessarily and partly changing a whole system.

Drawing on examples of the vision of transformation from Asia and Europe, Cheng, Chow and Tsui (2001:33) and Ball (1985:56-62) earlier saw the then

emergent globalist values of organisation as creating the logic of the information age system and its culture, and as the backdrop of transformation. These authors also observed that most organisations were trying to combine information and knowledge age modus operandi with TQM.

From a local perspective, the ANC government has developed a mixture of participative autocracy for delivery of the vision of quality culture, knowledgeable leadership, clear pursuit of quality and lifelong learning in C2005 in SA. These principles and mode of work partially describe desirable official culture traits that the ANC wishes instructional leaders to implement at school level (Olivier, 1998:1x). According to Botha and Hite (2000:139) the difficulties for instructional leaders and limitation of their initiative have resulted from the DoE approach; of using legislative dictates to change all aspects of education organization.

2.6 Organisational change and instructional leadership

This section concentrates on the work and difficulties of teachers in organisational change-what they understand as problematic, and what they see as working well in the implementation of C2005. Issues that are examined include the teacher and change of culture, stages of change of the educational organisation as well as the technology of education. Finally the section looks at alternative models of transformation.

2.6.1 **Change of culture, indicators and instructional leaders**

Research on transformational and organisational change similar to the change in the SA education to C2005, can be examined at school and personal levels of instructional leaders at GET band. The change could be conceptualised as taking place in the whole structure, culture, norms and values of the SA education and its organisation including its schools.

Needham et al. (2003:381) define organisational culture as “the deeper level basic assumptions, beliefs that are shared by members of an organisation that operate unconsciously and define in a basic fashion, often taken for granted, organisation’s view of itself and its environment”. Culture represents “the way things are done in an organisation”.

Needham et al. (2003:252) and Morrison (1998:152-153) with minor differences identify four classes of organisation culture; viz. power culture (centralization of power is a key feature), role culture (bureaucratic), task culture (task teams and networks); person culture (all functions are geared to serve a person). The four types of culture are applicable to transfer of C2005 policy to practice in SA. The question is what culture is dominant and would sustain quality transformation of the SA education?

Needham et al. (2003:252-253) show that symbols, badges, names, mission statements, literature and jargon or sub culture language are identity values that could be changed to develop desirable culture. Importantly, the values are derived from history and could be measured in the process of change. Even geographical locations and buildings serve as identity symbols expressing values. The question about SA's educational change is; are instructional leaders adopting the new identity values of C2005?

Clark (1996:79-80) undertook a study about schools culture identity and change, and reached the same conclusion that sometimes culture of a system is clothed in frameworks stating what system ethos such as risk taking, high achievement and good social relations for schools and teachers are supported.

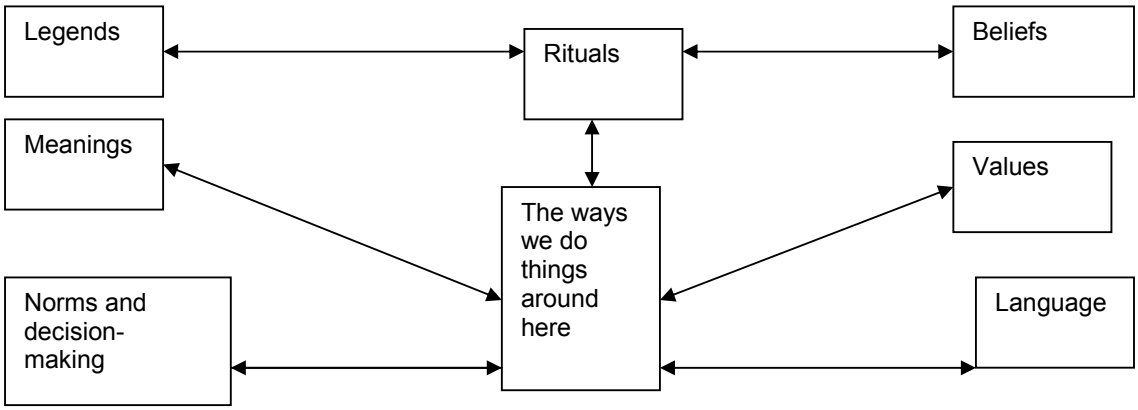
Davidoff and Lazarus (1997:3-4) go further than referring to history and purpose of curriculum development, and propose that it is a major challenge of the present educational system including its components such as

instructional leadership, to change the authoritarian culture and replace it with democratic culture that is integral to the OBE approach and C2005.

Needham et al. (2003:252-253) further assert that norms and symbols reflect culture, and at the same time help to shape it – it can be inferred that as education organisation develops a culture, its norms and symbols would also affect its culture and help shape the culture. Bot (2003:1-6) relates how teachers have been affected negatively. In some instances they have been demoralised by the autocratic power culture of the Department of Education (DoE) and school principals. The question is what framework could be developed to effect change with minimum difficulties to instructional leaders in C2005? (Confirm section 1.4).

In regard to changing the culture of schools and organisations, Figure 2.3 below represents a framework of the most important social aspects that could be manipulated to develop a new OBE driven C2005 culture in SA schools (Needham et al., 2003:253).

Fig 2.3 Indicators of organisational culture



(Needham et al. 2003:253)

Change of culture can be achieved through an emphasis on moving towards a better framework; better outcomes and a set of values for the organisation (see Fig. 2.3 above). The schools should create a new history of its legends that will function as a repository of the schools' identity. The school should create new values, rituals, beliefs, language and others that address new needs of SA such as multi-cultural professional teachers who can deal with challenges such as HIV/AIDS and establish a culture (Needham et al., 2003:253).

In the case of SA a beginning has been made, the introduction of OBE has been accompanied by cultural values such as lifelong learning. SA is in the process of starting a democratic culture and history (Chisholm, 2004:3, 12) that could well make learning part of a culture to resuscitate the culture of learning in schools and in industry.

When Needham et al. (2003:257-8) write about culture change, however they caution that the size of the organisation, environment, technology and new people, which would apply to schools, instructional leadership and curriculum development systems, could also affect the culture of the organisation positively or negatively.

However Macbeath and Mortimore (2001:179) and Needham et al. (2003:257) contend that opinions and decisions of those involved in the change process (like instructional leaders in C2005) are very important in deciding whether they can cope with change.

Change to C2005 has however concentrated very much on the technical, structural change with legislation and directives, demographic, financial side of systems change more than on people and the systems culture (Kgobe,

2001:28, 43). Yet it is people who sustain ongoing change and they need constant reinforcement.

2.6.2 **Reinforcing change in education and instructional leadership**

Van der Horst and McDonald (1997:6) however caution that the process of changing culture to OBE driven C2005 requires the DoE and instructional leaders to be prepared to deal with resistance resulting from personal and group concerns about the unknown impact of change. Alongside preparation to deal with resistance, instructional leaders must be prepared to deal with stress that accompanies change and affects them.

Lessons from other continents and countries such as New Zealand, the United States of America, Australia, and United Kingdom that are now oriented towards OBE and serve as examples for SA emphasised the cultural change process when they began the change to OBE. They demonstrate that culture change builds a solid foundation on which to base change. However, Jansen and Christie (1999:90-93) accept taking lessons from the international community, but note that technically cultural traits and classroom conditions at the GET band of countries such as Australia and the United States, are very different from those of South Africa. Moreover, technical discipline and terms of reference of SAQA and NQF to which change has been entrusted in SA were bound to develop differently from those of the developed countries.

Different educationists and stakeholders point at different issues that need to be addressed to sustain implementation of C2005. For example Nxesi (2004:23) the general secretary of SADTU, pointed at poverty as the main culprit in the schools' predicament, followed by poor preparation for implementation of C2005, resulting in postponements of curriculum change and teacher development.

Professor Seepe (2004:23) also put the blame for instructional leaders' problems on the implementation of C2005 after limited training. In direct reference to poor training of principals, subject and departmental heads and teachers Prof. Seepe said; "OBE teachers have been to workshops for the past 3 to 4 years but they are still confused". The views of SADTU representatives and those of Prof. Seepe suggest variance in the necessity and quality of preparation and implementation of C2005 that is shared by the DoE and instructional leaders.

For its part, the government has vainly relied on legislation of the Culture of Learning and Teaching Services (COLTS) and Tirisano to help sustain implementation of C2005 and deal with challenges such as the prevalence of HIV (Asmal, 2000:9). Zulu, Urbani, Van der Merwe and Van der Walt (2004:174) suggest an additional strategy of clarifying and detailing the vision that SA is pursuing longer and more comprehensive training and the introduction of Ubuntu at all levels of education to build such a culture. The authors suggest using the best model of change to address transformation.

2.6.3 **Alternative models of transformation and instructional leadership**

Chisholm (2000:56*)* among others is critical of the government regarding imposed changes that instructional leaders have to make in C2005. She observes that instructional leaders were trained in the autocratic tradition of the old system; she suggests that the present education system needs instructional leaders who understand curriculum framework to the level of designing of learning programmes efficiently.

Clark (1996:115-116) and Moloi (2002:5) suggest that a viable participative organisation that would facilitate transformation optimally, is a learning organisation or community that would operate through a learning culture that is adopted by the organisation and all those who function in the organisation.

Moreover, while the school as an organisation is developing capacity for transformation in all stakeholders, Walker (1984:3) and Booth, Collomb and Williams (1995:3), recommend adoption of Research, Development and Dissemination (RDD) model for complete change that is similar to the transformation to C2005. The RDD model functions through dissemination of research findings and information among policy implementers and teachers. The policy implementers in turn make informed judgments and decisions to solve problems and bring coherent change in whatever processes one wants to improve, such as instructional leadership and educational practice. The RDD model has however been criticised for relying on researchers who are often out of touch with teachers' classroom practice. The model is criticised for alienating teachers from research thus creating the difficulty of teacher relying on outside resources for solving problems. The junior position of teachers in the RDD model puts them at a disadvantage in relation to the process of transformation and begs the question; what ease and difficulties do instructional leaders experience in taking the initiative in the process and stages of change to C2005?

2.6.4 **Recognised stages through which change passes**

However Clark (1996:102), Needham et al. (2003:257), Ornstein and Hunkins (1998:304-305) address the process of change and all of them more or less agree, that most programs of change pass through three progressive stages from the beginning to the end of the change process. Steps that are taken in the process of change include creating positive opinions among candidates of change (in this case principals and teachers of GET level) to support change; enabling and building the capacity of people with training and participation in the change process and finally institutionalising performance in a changed mode. Bennett, Crawford and Riches (1992:126-127) add a fourth stage as strategies that ensure

sustained change through renewal and self correction for the organisation to complete the change loop.

Among several alternatives of appropriate strategies for sustained change in educational institutions and practices, Ornstein and Hunkins (1998:300) recommend normative re-educational strategy. Ideally the strategy would be complemented by modes of change such as substitution of materials and change of value orientation of instructional systems manned by principals and teachers. Ornstein and Hunkins (1998:300) further caution that once change has been enacted and institutionalised it needs ongoing support.

Support for change can be built by following structural change in the department and school re-organisation with recreation of a new culture in the minds of instructional leaders as it is shown in section 2.6.1. Other processes that could be manipulated to facilitate change are given below.

The process of change of culture from that of the old education system to C2005 has been undertaken through the emphasis on training, workshops, advocacies, talks and training sessions among others. Change can also be promoted through feedback media such as research, teacher and labour union activities, showing concern to allay realistic and imagined fears and converting the staff to new practices. Other measures are: clarifying reasons for change, taking advantage of existing relations among staff, encouraging participation, publicizing benefits of change, maintaining effective communication and involving key stakeholder such as unions (Macbeath & Mortimore, 2001:197; Morrison, 1998:4*).* It is important to establish the appropriate place for instructional leaders within the SA education system even as the system changes to C2005.

2.7 The place of Instructional leadership in the education system

The concept of the whole education system of SA is presented here to ensure that instructional leadership is understood to function in the context of the whole system and not in isolation.

Van der Westhuizen (2003:3-7) elaborately explains that a system is the same as an organisation and a social structure. Instructional leaders carry out policy objectives that are intended to deliver quality education in the education system. This section links instruction and instructional leaders to the whole school and discusses the context, inputs, processes and evaluation difficulties of instructional leaders in the SA education system. Van der Westhuizen (2003:30) argues convincingly that problems and difficulties experienced by one part of the system affect other parts.

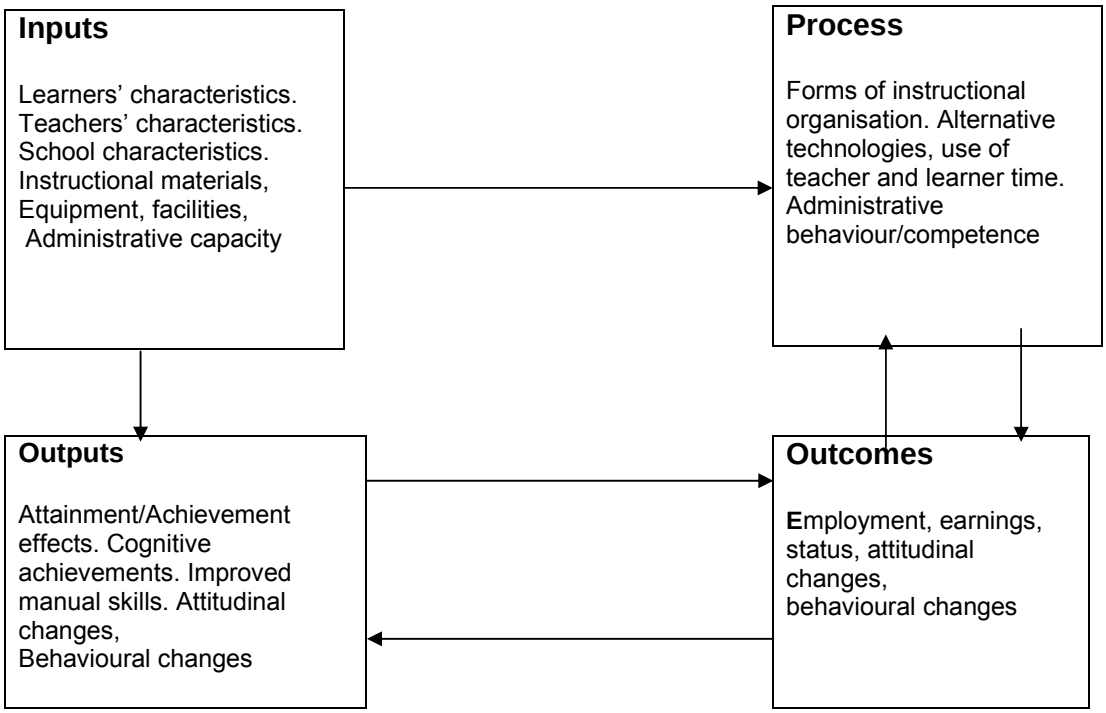
2.7.1 **Instructional leadership in a transforming education system**

The three concepts of organisation, structure and functional culture and systems provide effective conceptual, analytical and functional models to represent educational organisation and transformation/change of reality. The systems model is the latest one to be used popularly to explain complex relationships such as those in C2005 representing the SA educational system and its global environment (Bush, 2003:41-41; Moloi, 2002: ix).

An education system is a unit that has parts which function interdependently to provide effective education according to the education needs of a specific target group (Van der Westhuizen, 2003:5). Clark (1996:28) and Moloi (2002:6-7) add a human dimension to the systems functioning and state that, “a social system is a human collective whose members fulfill a diversity of roles within a recognisable and sustainable whole”. This is the case with principals, HoDs, teachers and the community in the implementation of C2005 in the SA education system.

Needham, Dransfield, Harris, Coles & Rowlinson (2003:250 – 324) use the organizational structures and cultures of systems to explain how the school works as an organisation. Van der Westhuizen (2003:27) presents a sketch to illustrate an education system in Fig. 2.4.

Fig. 2.4 Major factors in the education production process



(Van der Westhuizen, 2003:27).

The model has a one-way relationship from inputs to the process and outputs. There is a two way relationship between outcomes, outputs, and processes.

The systems model complements the conventional input, process and output model that has been used for some time now to represent organisations. While Van der Westhuizen (2003:3) presents a model that adds the outcomes dimension which is relevant and is regularly used in

official documents in SA at the time of writing, he has left out the context within which inputs are made. If that had been included it would complete the system. Notwithstanding this omission, the DoE approach to evaluation of the progress in the SA educational system has used this model extensively up to now.

To clarify the system's functioning further, Needham et al. (2003:256) present an organisational model of systems, which has internal component parts that work together to sustain the system. The component parts work within internal culture and its environment. The SA educational system can also be represented with this system together with its many component parts such as the instructional system, working cultures and environments as well as instructional leadership and change in the system.

According to van der Westhuizen (2003:4-10) the SA education system consists of the needs of South Africans, the goal of education in SA, the education system policy, administration, structure of teaching and support services in the formal, informal and non formal education provision. The administration has an organization chart with the Minister of education at the head (see section 3.5.1). The National Department of Education (NDoE) has four branches, namely, Education and training systems branch, the Programme branch, the Human resources branch and the Higher education branch. The NDoE leads the provincial departments of education (Pretorius and Lemmer, 1998:15). The major part of the educational system of SA and its parts have been legislated. SAQA and the NQF are legislated policy structures and regulate the implementation of C2005.

Coetzee (2002:15-21) presents SAQA as an organisation with an executive management. SAQA heads standard bodies, education and training quality assurance bodies and education services providers. The NQF is presented in more details in Figure 2.5 below.

Figure 2.5 The National Qualifications Framework (NQF)

NQF Level	Band	Types of Qualifications and Certificates
8	Higher Education and Training Band	Doctorates
7		Further Research Degrees
6		Higher Degrees Professional Qualifications
5		First Degrees Higher Diplomas Diplomas Occupational Certificate
Further Education and Training Certificate		
4	Further Education and Training Band	School/College Training Certificate Mixture of units from all (NGOs)
3		School/College Training Certificate
2		Mixture of units from all (NGOs)
Grades 10 - 12		School/College Training Certificates Mixture units from all (NGOs)
1-Grade 9 General Education and Training Certificate 1= ABET 4		

Grade 7-9 Grade 4-6 Grade 1-3	General Education And Training Band	Senior Phase Intermediate Phase Foundation Phase	ABET – Level 4 ABET – Level 3 ABET – Level 2
Reception Pre school year			ABET – Level 1

(Van der Westhuizen, 2003:4-10)

The change form the pre 1994 education structure to General Education and Training (GET) is a huge technical and cultural change (Pretorius & Lemmer, 1998:viii).

In classifying schools among different types of systems and organisations, Van der Westhuizen (2003:5, 12, 67) asserts that a system and an organisation are identical. He further identifies the school as a special

organisation - an open system. Davidoff and Lazarus (1997: xvii, 5), Moloi (2002:28-29) and Romiszowski (1981:11) arrived at a similar conclusion in their earlier studies. From this viewpoint of the school as an organisation, Van der Westhuizen argues convincingly that environmental systems influence the national education system. Such influence could affect the main purpose of the education system, which is to deliver effective instruction for maximum positive learning.

An open system model is seen as the most relevant model that represents reality for an analysis of organisational and cultural changes in the roles and functioning of participants such as the instructional leaders in SA (Needham et al., 2003:198). The open systems model also applies to school at macro and micro levels (Pretorius & Lemmer, 1998: ix). Joyce, Weil and Showers (1992:10-15) and the National Education Coordinating Committee (1993:12-23), gave the details of changes in the education sub systems in their planning stage in SA.

The changing conditions of educational inputs such as the school, resources and personnel make the school system unpredictable. The open and unpredictable nature of the education system is reflected in the system's paradigm which has also been associated with cybernetics. Cybernetics is known as an interdisciplinary approach to problem control and problem solving practice in exceedingly complex probabilistic situations, outcomes, competence and performance based organisation (Kaufman, 1988:12-13; Reigeluth & Garfinkle, 1994:17; Romiszowski, 1981:11).

It is precisely these complex situations of change in general and in OBE in which systems models have been applied successfully where there are increased prospects of success in the design and development of systems of instruction, instructional leadership and quality delivery of C2005.

Mayer (2003:8) presents these processes of instruction (teaching) and learning in Table 2.1 as teachers' functions in a smaller facilitative and communication system that is part of a bigger school system.

Table 2.1 Factors of teaching, learning processes and outcomes

	Instructional manipulations	Learning context	Learner characteristics	Learning processes	Learning outcomes	Outcomes performance
Factors in the teaching and learning process	Presenting a lesson programme with leading questions.	Social and cultural context	Existing knowledge and processing strategies	Selecting, Organising, integrating information.	Meaningful learning	Retention and transfer

(Mayer, 2003:8)

Table 2.1 demonstrates that teachers have to understand that teaching is a manipulative exercise that they carry through their understanding of the context, existing knowledge in learners, organisation of learning materials and assessment.

In terms of organisational and systems change in educational practices such as instruction, Needham et al. (2003:250-251), add the concept of culture to explain how identities of organisations like schools are reflected in values, ideals and beliefs of the people who are employed by the organisations. Since cultures influence how organisations and people operate, it is necessary to understand instructional leaders' culture at work (at school), to align policies with instructional modes of work for meaningful implementation of policy like C2005 at the GET band. Such understanding would also facilitate change of culture to quality implementation of C2005 in the SA educational system.

Waghid (2003:8) shows that instructional leaders (teachers) within C2005 are predominantly facilitators of learning where learners are expected to take responsibility for their own learning. This presents a cultural change

and a set of challenges and difficulties for teachers who start doing something new that is unfamiliar. This would also affect other areas of the education system that depend on the authority of teachers to function well. These changes beg the question; have principals, HoDs and teachers internalised the values of C2005 in the dissemination advocacies that they have attended sufficiently to enable them to implement C2005 effectively?

2.7.2 **The legislative anchor of instructional leadership**

In spite of the latest claims of situational leadership to success and the context as an important factor in the competence of leaders, such as the principals and deputy principals, some of the earlier perspectives on personality types of leadership such as flexibility, objectivity and other types are still valid today and give insight into the history of leadership (Squelch & Lemmer, 1994:3) (see section 2.2.2).

Chisholm (in Kgobe, 2001:6-7) and Fullan (1993:1) analysed the systems and cultural context of educational policy organisation, formulation and implementation, and hence the role of principals in SA. They concluded that the SA education could be analysed through three analytical models, viz. “top down” model, “bottom up” model and a bargaining and conflict model

In the “top down” model, transformation to C2005 is seen as acceptable responsibility of government. From this perspective, the process of implementation is seen as a matter of technical competence and resource mobilisation (Kgobe, 2001:5-6).

The DoE officials favour the “top-down model”. However, one of the major shortcomings of the model is that it fails to get some of the instructional leaders (principals) to buy into curriculum change to C2005 (Kgobe, 2001:6).

Kgobe (2001:7) argues that for curriculum changes to be permanent, it is necessary that those involved in the transformation (principals and deputy principals in this case) experience a change of their subjective realities. The realities include perceptions, values and beliefs of principals and deputy principals as instructional leaders that would change more permanently within collaborative discussions and conviction, more than they could in "top down" or even conflict models. Kgobe (2001:7) concludes his argument by stating that the notion of the rising importance of collaboration is not intended to undermine the power of legislation to shape formal teachers' response to C2005.

Rather that, as Harley et al. (1999:13-14), observe, from the legislative perspective, the national and provincial governments have appropriately legislated many new roles, conditions and duties for the Principal as an Instructional Leader (PIL) within C2005.

Since these legislative documents and instruments of transformational change of education and instruction subscribe to constructivist assumptions and psychological terms, the PIL has currently been influenced to operate within a mixture of cognitive and constructionist thinking which pervades the information age (Lambert et al, 1998:18). The PIL is also influenced by values that are integral to C2005 development such as Lifelong learning, democracy, redress, equity and teamwork (DoE, 1997:6). In addition to the general developmental values, the PIL is influenced by particular values that underlie C2005 (OBE basic assumptions and values such as the claim that success creates more success). Additional values are; student-centered leadership, collegiality and quality curriculum development (Chisholm, 2000:56).

It is in the context of the changed condition of the principal that Lambert et al. (1998:18) define leadership as the reciprocal learning process that

enables participants in a community to construct meaning towards a shared purpose. Lambert et al. (1998:18) called this type of leadership "constructivist leadership".

According to Harley et al. (1999:14), at the time of his writing the functions of principals as instructional leaders in C2005 were determined by the officials and documents that are presented in Table 2.2 below.

Table 2.2 Stated functions and roles of principals, HoDs and teachers in C2005

Document	Date	Developed by	Function
Norms and Standards for Educators (NSE) (Focused on knowledge and academic requirements).	Mid 1998	Committee on Teacher Education Policy (COTEP). Revised by technical committee for the National Department of Education (NDoE).	Defines employer requirements, evaluation of qualification, for National Department of Education as the employer of all teachers in public schools. To provide a system for professional development of teachers.
SACE code of conduct (Focused on Value and professional requirements).	Late 1997	South African Council of Teachers (SACE) and Education Labour Relations Council (ELRC).	To regulate the ethical conduct of professional discipline of all teachers registered with SACE.
ELRC Manual for developmental Appraisal.	Late 1997	University of the Witwatersrand Education Policy Unit for ELRC.	To establish appraisal procedures, criteria and instruments for all levels of teachers.
NDoE Duties and responsibilities of teachers (Focused on Skill and occupational requirements)	1998	National Department of Education (NDoE)	To outline the duties and responsibilities of teachers at each post level. To provide job description against which teachers may be legally appointed, promoted and appraised.

(Harley et al., 1999:14)

The documents translate the constitutional provisions on education, RDP and GEAR policies through establishment of delivery institutions to provide a framework for instructional leaders' professional development and

implementation of C2005 (Harley et al., 1999:15). In order to demonstrate that the ANC government is committed to the development of education in SA, it passed a legislation to establish an educational programme called **"**RDP culture of teaching and learning" (Christie, 1996:62).

Alongside legislation, Harley et al. (1999:17) indicate that four other legal instruments were put in place to guide education practice. Each of the four documents focuses on slightly different areas between knowledge, values and skills. Specifically, COTEP focuses on teacher employment and conditions of service. NDoE concentrates on duties and responsibilities of instructional leaders. ELRC concentrates on labour relations while SACE concentrates on ethical code of conduct and professional requirement values that principals and teachers should uphold.

Furthermore, all the documents serve a procedural function. SACE for example explains registration procedures, disciplinary ethical code of conduct and competence of teachers and functions as an appraisal document. The NDoE provides job descriptions of instructional leaders at different levels (Harley et al., 1999:19).

In respect to competences, Harley et al. (1999:19) state that, "the documents, especially COTEP prescribe foundational, practical and reflexive competencies for instructional leaders (principals, HoDs and teachers)". These documents can be taken to represent the official position on the competencies of principals. Competences can be directly linked to understanding, practice, reflection and synthesis (Harley et al., 1999:4). The competences are discharged within certain roles.

Among the seven roles prescribed by COTEP, which mark the interface of national policy and schools, the PIL assumes several roles separately from teachers because of his/her higher position in the school organisation.

Primarily s/he is a leader of other teachers, an administrator and manager. S/He should also be a scholar, researcher and life-long learner, and finally s/he should share ideals such as teacher of citizenship, assessor, community and pastoral leader and take the ideals to be his/her responsibility (Harley et al., 1999:26 - 27).

The seven roles share characteristics of foundational, practical and reflexive competences for principals on their own. When the characteristics are applied to the context of SA schools they suggest that principals have to develop the following knowledge, skills and abilities in order to function competently:

- understanding of group dynamics in SA and developing problem solving, conflict resolution approaches to school leadership and management;
- understanding of team teaching and approaches to teaching programmes;
- understanding of classroom management under SA conditions (big class sizes and limited resources);
- understanding of dealing with high illiteracy rates among the parents and how to diagnose and report among them; and
- identification of resources and appropriate management styles that professionals and other community members should use (Harley et al., 1999:26-33).

Yet these many requirements for the principal beg the following question: “With what ease and difficulty have principals tried to guide teachers in their implementation of C2005 in spite of the many requirements and the role that the principals has to play? “

2.7.3 **The role of instructional leadership in curriculum dissemination**

With specific reference to the principal in SA, s/he has traditionally been a medium through which the new curriculum passes for implementation. The principal has functioned at the interface between the DoE and schools.

The DoE organises advocacy sessions that bring the education authorities to meet principals and disseminate information and knowledge of the new curriculum. The researcher attended one of such advocacies in Bloemfontein, held in Sentraal Laerskool on the 21st July 2001. In the advocacy session principals were not trained on C2005. They were prepared to receive the guidelines as an instruction.

D'Olivera, a member of the DoE advocacy team, who was working in the Free State directorate of education in 2000, told Paine that in future the DoE would introduce C2005 developments to principals first so that the principals would know what teachers had learnt from C2005 workshops (Paine, 2002:294). However, the question is; could such short introductive training really equip principals to supervise HoDs and teachers?

In the meantime a "Cascading model" of training was initiated. The model has been supported by two others. One model is referred to as a "cluster model". The cluster model refers to the method of bringing schools in the same location together for training at the same time. The second model is called "school based model". The latter model involves training that comprises short-term in-service sessions on the school grounds. The "cascading" model involved training a cadre of teachers and district education officials who were expected to go back to schools and disseminate knowledge that they had acquired from in-service training. The other models are initiatives that offered training based on sharing information between schools in the same area and extension of such training to practice in the school (DoE, 2001:7). Pithouse (2001:155) went

through training and implementation of the cascade model and concluded that most of the difficulties of the model for teachers arise from poor training.

In an attempt to improve training, especially of principals, the DoE learned from other countries and started a principals' training college, Mathew Goniwe Leadership Institute, in Roodeport. Yet unlike similar training in Britain where courses have been compulsory for principals since January 2004 (*Teacher Education Supplement*, 2002:8), in SA the difficulty for principals is that the courses are not compulsory. Moreover, the DoE would have to find extra time to release principals to undertake courses, under expert guidance that should include mastery of the culture change to C2005 that the training would involve.

2.7.4 **Instructional Leadership and the "top down" culture**

The development of C2005 on the OBE principles also developed an OBE culture base for the SA education system. The concept of culture in instructional leadership and curriculum development is given further in more details in section 2.6.1. Suffice to note that OBE imposes different values, beliefs and attitudes (culture) to both officials of the DoE and instructional leaders from the macro level of education management to the school level. Spady and Baron articulate the culture of OBE as focusing and starting with clearly stated outcomes up to assuring their achievement (Boschee & Baron, 1993:5-13; Spady, 1994:9-17).

Needham, Dransfield, Cole, Harris and Rawlinson (1999:266) use the concept of leadership culture as an analytical tool to differentiate types of leaders and leadership organisation. They provide three categories of leaders according to the degree of use and abuse of position and political power. The leadership categories that have a bearing on C2005 in SA are:

a) Autocratic leadership that is characterised by not sharing power, excessive use of power to command followers and ensuring that their commands are complied with.
b) Democratic leadership. This type of leadership is participative but fails to work effectively most of the time because it is very slow to arrive at decisions as most of the time is spent on debate on the merits of competing decisions.
c) Laissez Faire leadership. This type of leadership leaves followers to work without any supervision (Nicoll, 2002:31–35).

The two extreme theories of leadership fit into types of leadership, personality trait, behavioral and situational theories. Bush *(*2003) observes that recent approaches to leadership can be studied under formal, political, subjective, ambiguity and collegial models. Bush (2003:186) sees the current problems of leadership, including leadership at the time of OBE driven C2005, as providing transformational leadership, leading through empowerment and coaching.

Illustrating the source of autocratic culture similar to the one in SA schools, Bush (2003:49) explains the term instructional leadership, as “the primary source of knowledge of the school’s educational programme and its implementation”. The power of leadership could be conferred on the employees of organisations through the office, or earned through knowledge and expertise. Principals, line managers and teachers (instructional leaders) even in C2005 are given power and authority by their positions in the school as an organisation. However, this hierarchical structure of accession and use of power promotes the culture of managerialism that alienates the managed from the managers.

According to Bush (2003:150-151, 188) each leader has his /her own style of instructional leadership that could be highly successful in some

instances/situations and not in others. It could be deduced from this analysis that situational leadership is the most technically appropriate constructivist leadership that is in line with the diverse assumptions and requirements of C2005. However instructional leaders in SA would have to learn and understand situational leadership. Moreover, Coleman et al. (2003:3-9) conclude in a study in SA that teachers still rely on rote learning and curriculum designers still hand C2005 down for implementation, in an almost autocratic manner with an alienating effect to instructional leaders at GET school level.

In line with this autocracy, since 1990 official pronouncements in SA have emphasised the role of the principal as an educational team worker, teacher, mentor in the good implementation of staff appraisal, pupil performance monitor and a good counselor of staff, parents and pupils (Jacobs, Vakalisa & Gawe, 2004:24; Squelch & Lemmer, 1994:11). Schlechty (1990:vi–viii) recorded similar official prescriptions for instructional leadership in the United States in 1990 which he characterised as orientated towards participation, learning, and quality delivery of curriculum. Yet in practice there has been more legislated change and managerialism in SA up to the time of writing (Christie in Bush & Heystek, 2003:136-137).

From the Asian experience Cheng, Chow and Tsui (2001:37) take the present educational changes as a global movement and argue that it is accompanied by participation and democratic culture. Cheng et al (2001:37) see such culture developing human initiative, creativity, social harmony, staff development and synergy for achieving the mission of the organisation. Theoretically many of these cultural traits would be expected to exist in an ideal instructional leader who could cope with the complexity of C2005. Yet because of lack of acculturation and training these traits cannot be assumed for instructional leaders in SA. Coleman et al. (2003:50-52) concludes that instructional leaders (in this case teachers) in

SA have not made a paradigm change. Instructional leaders still see themselves as dispensers of knowledge and not simply facilitators of learning and programme designers as C2005 requires.

Besides this functional rigidity of the teachers' leadership role, the term instructional leadership has different meanings when it is applied in the school context to principals and deputy principals in SA. The principal is often seen as a manager while the deputy is seen as an implementer (Cambell, Bridges & Nystrand in Webster, 1994:5).

According to Macbeath (1998:63) the type of leadership that is exercised by the principal, the deputy principal, line manager and the teacher, could be discussed from one perspective when one looks at a school holistically. When seen this way leadership has distinction in the duties of the principal, the deputy principal, line managers and teachers. Leadership is seen as a cultural process of thinking about the way forward and taking a risk to explore, by people given to show others the way.

Moreover, in spite of the inevitable technical separation of principals, line managers and teachers by their rank, in SA, principals and HoDs could develop collaboration, cooperative learning, and authentic assessment in SA curriculum design and delivery, articulation, advocacy, constructivism and meta-cognition (van der Horst & Lemmer, 1997:6).

In this regard Macbeath and Mortimore (2001:126-128) give a slightly different but essentially synthesis constructivist perspective of instructional leadership that eschews top down and emphasises content and process. From this view an effective leader is the one who has a clear view of a personal vision of what s/he wants to achieve. The instructional leader looks ahead, anticipates change and prepares people who work in the company so that change does not surprise them and take power away from

them. This type of leader that the authors describe is a changed pragmatic leader that does not depend on top down power. S/he captures current trends, negotiates and compromises depending on the context and demands (Macbeath, 1998:63).

2.7.5 **The demands of best practice on instructional leaders**

The official version of the demands of best practice in C2005 is based on the history of the OBE, which is traced to competence and mastery learning theories and practice espoused by Benjamin Bloom in the 1950's (Du Toit & Du Toit, 2004:8; Van der Horst & Macdonald, 1997:9 - 11).

C2005 is aligned to the constructivist theory of knowledge (Coleman et al. 2003:30-31,173-5). Research into OBE, suggests that for instruction to be regarded as best practice it means infusing behaviour change in learners. The behaviour change is induced through the learning programmes that make learners competent in what they have learned (Pellicer & Anderson, 1995:92). Pellicer and Anderson (1995:92) further wrote on instructional leadership in the United States of America that literature evidence showed that principals with best practice in general, should have the following characteristics:

- foresight;
- organisation;
- leadership skill;
- mentoring skill; and
- high achievement drive.

Pellicer and Anderson (1995:78-79) wrote on a theme that is similar to the SA context and propose that competence and effectiveness in teaching are based on good planning. Pellicer and Anderson (1995:78-79) go further, to identify such planning as involving clarifying the exit outcomes. In the case of C2005, such clarity would be required for statements of outcomes,

structure of instruction, assessment and alternative measurement of efficiency, if there were problems with any of the parts of the curriculum or instructional leadership.

2.8 Instructional leaders' problems with change at school level

In respect of instructional leaders' problems that are related to change of culture at school, Moloi (2002:xiv) argues that the root of the problems facing public schools is that "the steps taken by the ANC government to build a new SA through reconstruction, transformation and policy intervention did not have much impact in changing the culture of the schools concerned". At the time of writing this argument is still valid.

Moloi (2002:xiv) further elaborates the position that the problems experienced presently in some schools in SA are centered on the history and culture of competing political, economic and ideological interests in education. Many effects and symptoms of underdevelopment of the education system were hidden but have, since 1994, resurfaced as obstacles to new policy initiatives.

Davidoff and Lazarus (1997:15) add to the list of problems of schools, especially those formerly managed by the Department of Education and Training (DET). The authors refer to common history and demographic characteristics that make public schools in the Free State, the subjects of this study, very similar. The characteristics of the schools form the context within which instructional leaders have functioned and acquired values that have to be changed to fit into C2005. Among the problems afflicting the schools at the time of their writing were; overcrowded classes, lack of physical resources, lack of adequate sporting facilities (Davidoff and Lazarus, 1997:15). The question is; what difficulties do these problems pose for teachers?

Problems that affect instructional leaders and practice directly are: lack of vision, absence of comprehensive and prolonged staff development, low teacher morale**,** lack of or poor culture of learning and teaching, discipline problems with learners, cliques on the staff, division and mistrust between teachers and management and lack of parental involvement in the school (Davidoff and Lazarus, 1997:15). From the instructional leaders' perspective, a question that could be asked is: What alternative framework could be used in the place of the "top down" approach and current quality assurance structures to incorporate teachers' views at grassroots level and make input into an enduring quality assurance of C2005?

2.9 The specific role of the principal as an instructional leader

It is logical that under ideal conditions the principals' contributions to the design of C2005 would have been a prerequisite. At the time of writing the role was restricted because SAQA, NQF and several particular legislative structures such as design teams have provided frameworks for the design of C2005 that is regarded as a legal requirement (Killen & Spady, 1999:200). Regulations and conditions for registration of education providers on the NQF stipulate that learning outcomes that have defined purpose should be presented in programmes for them to be registered. Programmes must represent a planned combination of purposes that are intended to provide qualifying learners with applied competence and a basis for further learning (SAUVCA in Breier, 2001:26-27).

2.9.1 **The principal and transformation**

Further research on the PIL in educational organisation views the role of the PIL changing, from teacher centered to learner centered instructional leader, who ensures that learners actually achieve the outcomes that are nationally agreed for the learners (Webster, 1994:4). Learner centered principals' leadership includes the following:

- promoting a shared vision and philosophy of learner centeredness and aim to maximise learner growth;
- evaluation with skill and courage;
- having love and interest in children;
- confidence and ability to teach teachers for improved practices;
- use political dynamics of the school for learner benefit;
- promotion of good relations among staff and learners;
- anticipating and thinking forward; and
- having a high level of tolerance and stress resistance.

The SA constitution (1996) also provides the framework within which the educational responsibilities and instructional outcomes of the PIL are defined. The framework includes principles such as non-racism, nonsexist, democracy, equality and redress of past injustices to guide programme design and individual behaviour of instructional leaders and behaviour of groups in educational institutions. Besides the principles, state organs and legislation individually and conjointly, give definition to desirable outcomes of learning within C2005. Harley et al. (1999:15) documents the details of the functions and roles of the principal, HoDs and teachers in the contents in section 2.7.2, Table 2.2. However, difficulties have arisen when these responsibilities have been interpreted in different ways along the line from the DoE to teachers (Coleman et al., 2003:44-45).

Spady, (1994:29, 39, 40) gives an example of the principals' foundational competence when he points out that contrary to the "top down" approach, in theory OBE advocates collegiality and promotes participative democracy in all areas of education and training.

The culture of collegiality and collaboration by the PIL is in line with expectation that the PIL would be an accountable vision articulator and a pace setter of high expectations for the whole school (Harley et al. 1999:26-

33). Spady (1994:10-12) and Baijnath et al (2001:114-5) summarise the OBE system implementation culture and encourage HoDs and teachers to implement the following four OBE principles at school: clarity of focus, expanded opportunity, high expectations and designing down learning programmes.

Moreover, the responsibility to change the culture of teaching and learning falls on the principals, together with parents, teachers and learners (Pretorius & Lemmer, 1998:39). Literature shows that in 1996 Chisholm recommended that the culture of learning and teaching could be restored in the environment of trust and good relations between teachers and learners. Logically the principals would still play a major role in implementing such measures. These change measures would be undertaken more systematically within the change theory described in section 2.6.1. The next section discusses the principal's role in the dissemination of C2005 in the community.

2.9.2 **Evaluation of the instructional leadership role of the principal**

The role of the principal as a competent instructional leader in C2005 could be evaluated from several perspectives. The evaluation will also identify measures that are required to complement the function and the difficulties that the principal faces. One operational perspective in this study is organisational and systemic analysis and evaluation. From this perspective the first area to be evaluated would be the ideal expected and realistic, practical opportunities and limitations of principals within the structure of the SA education undergoing transformation to OBE based C2005.

Further evaluation of the performance of principals, their role and the difficulties of instructional leadership in C2005 could be made on the basis of whether principals meet all their employment requirements. These requirements are expressed by the South African Schools Association

(SASA), SACE, ELRC and the employment of Teacher's Act among others. SACE and ELRC are presented in section 2.7.2, Table 2.2. The number of these institutions with different expectations may justify asking whether the expectations on what teachers are to do are not too many and would not overwhelm them.

However, the DoE has already established mechanisms with which some of the functions of the principal can be evaluated at different levels. The mechanisms are the IQMS, the Whole School Evaluation (WSE) and the Performance Management System (PMS) (DoE, 2002). From an evaluative point of view, the question is, do the C2005 designers' expectations match capacity, preparation and support of principals to satisfy and solve instructional leadership difficulties? Paine (2002:294) showed that the NDoE and the FSDoE had not taken principals on board when they prepared teachers for the implementation of OBE. However, later the FSDoE decided to inform principals of the content of teachers training (d'Oliveira, in Paine, 2002:294). Yet it is still relevant to ask whether informing principals has put them in a position to help teachers to deal with problems of implementing C2005.

According to the WSE manual the technical principles and cultural elements that the DoE measures as the responsibility of the principal are: functionality of the schools, management, governance, quality, curriculum, learning, skill, institutional operation and parental participation.

Other studies about the principal such as the one that Jansen and Christie (1999:7-8) undertook, examined the changes that the principal's position has undergone, especially in terms of leadership and participation in the design of C2005. They indicated, that principals and teachers had no involvement in conceptualisation and decisions about adoption of OBE driven C2005 (Jansen & Christie, 1999:7-8). A relevant question to ask in

this regard is; have instructional leaders bought into C2005? What difficulties are they facing because of the fore mentioned exclusion?

Other relevant dimensions to explore are; a formative evaluation of the structural and functional changes of the position and understanding of principals in relation to responsibilities and accountability within the new institutions of C2005. One could look at the changes that have taken place in the principal's values, language and culture. Furthermore one could aim to establish whether and what perceptions prevail in the minds of principals about C2005 (Jansen & Christie, 1999:7-8).

From yet another angle Spady (1993:91) proposes that OBE is not a programme but a way of documenting instruction, design, development and delivery of curricula such as C2005 (which has to be managed by principals) in terms of effectiveness in pursuing its intended outcomes. According to Spady (1993:91) OBE has a different approach to pedagogy, with emphasis on active modeling, expecting success, intensive engagement, and diagnostic assessment, fragmented feedback to learners about their performance effectiveness.

Evaluation tools and strategies could also draw from literature on School Effectiveness Research (SER). SER research claims that conclusive evidence suggests that there is broad agreement on the factors that are responsible for achievement of high levels of outcomes at school. The eight factors that Hopkins (1987:2) gives as representing characteristics of effective leadership (of the principals) for high outcomes achievement are:

- curriculum – focused school leadership;
- supportive climate within the school;
- emphasis on curriculum and teaching (for example, maximising academic learning);
- clear goals and high expectation for learners;

- a system for monitoring performance and achievement;
- on-going staff development and in-service;
- parental involvement and support; and
- the generous support that the local educational authorities give to schools.

The high outcomes expectations are also related to the quality and variations in schools' climate, culture or ethos that form part of the whole education system (Hopkins, 1987:2).

In regard to culture of leadership, Bush (2000:64) proposes collegiality of the principal who is a leader, as a better alternative to instructional leadership autocracy. In the collegiality model the principal is the first among equals at school. The style of leadership both influences and is influenced by nature of decision-making process. The basic idea of the collegial leader is less to command than to listen, less to lead than to gather information and ideas for decision-making. Collegial models emphasise authority of expertise rather than official authority *(*Hoyle, 1986:155). A relevant question would be whether the DoE is professionalising the principals' and teachers' leadership in SA.

Hoyle (1986:155) emphasises the symbolic dimension of leadership, and constructing an image of the school culture in words, actions, artifacts and setting. To validate the point made by Hoyle (1986:155), the principal is seen as a visible representative of the school to the outside world, s/he is well placed to generate culture by doing the following which are some of the indicators of the principal's competence:

- documenting school's history;
- anointing, celebrating schools heroes;
- reviewing school rituals (institutionalising good behaviour and discipline), conveying new values and beliefs to everybody;
- exploring and developing ceremonies;

- Identifying teachers who act like priests, priestesses, and gossips and incorporating these into mainstream activity - this gives informal communication network.

Wagner, Kegan, Lahey, Lemons, Garnier, Hesling, Howell and Rasmussen (2006:209-210) suggest that a new type of leader that is needed will be a professional who is able to train HoDs and teachers to find answers for his/her school community. Yet a question could be asked: with what ease and difficulties have the PIL and teachers been working with the community in the implementation of C2005?

2.9.3 **The PIL and the Community**

There is evidence from School Effectiveness Research (SER) that constructive involvement of parents in the functioning of schools, which is facilitated by the principal, holds great benefits for the school, learners, parents and their mutual relationship (Katzen, Krige & Kok, and 2000: 1). Indeed one of the notable changes brought by C2005 is the demand for involvement of parents in the education of their children Epstein (Lemmer, 2000:65). Parents are expected to help learners to continue working at home on real life situations that are related to C2005 among others.

Moreover, Epstein (Lemmer, 2000:65) puts some responsibility on parents to get involved proactively in education, and advances the following six types of parental and community involvement in the education of their children: parenting, communication, volunteering, learning at home, decision-making and collaboration. All of the parental functions are associated with the roles that parents seem to expect from schools.

Besides these expectations however, within C2005 parents have the SGBs framework through which they participate in the everyday working and decision-making, partnership and involvement in schools and teaching locations in SA (Katzin et al., 2000:12).

Katzin et al. (2000:2) propose that parents, including all participants in the education system must agree and support the curriculum. Hence the PIL has to work collaboratively with them. It is a challenge for the principal to work with parents because, as the constitutions of the SGBs show, parents outnumber all other stakeholders in SGBs. Yet research by Katzin et al. (2000: 4) has shown that parents are not trained sufficiently for their work. Reeves (1999:5) found apathy and non-involvement in school activities by parents.

Katzin et al. (2000:4) and Reeves (1999:5) research found that only 62% of parents showed concern that they were insufficiently informed about principles of the OBE driven C2005, and details of the parents' role. This gives more responsibility and difficulties to the PIL as s/he must counsel or train parents about their role.

Indeed at the level of the community Clark (1996:149-151) among others, asserts that the work of education authorities and the principal is to create a learning community as a condition for transformation of education and training. Of course the principal works with the rank and file in the school. A question that could be asked is: With what ease and difficulties does the PIL experience working with HoDs and teachers in the community? The next section examines the role of the HoD as an instructional leader.

2.10 Instructional leadership role of the Head of Department (HoD)

Both the head of department and the subject leader are line managers. Coleman et al. (2003:83) define line managers as those teachers who have some responsibility for planning, organizing, directing and controlling the work of other teachers. The role of the middle manager includes helping teachers to develop and implement subject curriculum and supervising such implementation.

According to Coleman et al. (2003:83), middle managers have more influence in what learning and teaching goes on in the classroom even more than the principal. This post of HoD may also vary in form depending on the size of the school. In small schools in SA the role could cover a limited scope of activities within the school.

The role of middle managers was downplayed and in some instances omitted in educational legislation in SA, especially regarding remuneration. It was only at the time of writing that the Ministry of Education was planning to give teachers incentives, reward for good work in education with promotion, and some payment to encourage teachers to stay in education. This arrangement is tied to a system of appraisal called Developmental Appraisal System – DAS (DoE: 2005) and this system is part of IQMS. In the system HoDs were going report on the performance of teachers so that teachers would qualify for a monetary incentive on the basis of a positive report.

For HoDs, according to Coleman et al. (2003:85 – 86) a job specification of the middle manager against which HoDs performance may be gauged includes the following:

1. two general themes, leadership and communication;
2. four main areas of responsibility, pupils, staff, curriculum and resources;
3. three contexts, the department, the school and beyond the school; and
4. two dimensions, routine and developmental activities.

The skills that middle managers need and the preparation for which they are to be trained include their personal capabilities and organisational competency. Among the personal skills that the HoD requires are:

knowledge of the subject, professional skill and professional judgment. S/He also needs social and technical skills that could be used and passed on to successors (Coleman et al., 2003:85 – 86). Besides these skills the middle manager's job description includes the following duties: Representation of the department outside the school for training staff, allocating resources, developing curriculum including strategies for teaching.

In spite of the important leadership role, most middle managers are teachers who have been promoted for demonstrating dedication or service. Coleman et al. (2003:90-93) see their role as ambiguous, but with a lot of potential in the OBE driven C2005. Yet to reveal the difficulties that HoDs experience in their work, a question could be asked: With what ease and difficulties have the HoDs implemented C2005?

2.11 The Teacher as an Instructional Leader (TIL)

Section 2.10 indicated that difficulties that HoDs experience can be attributed to their managerial position in the organisation of schools. Their difficulties take the form of administrative problems. The class teachers in turn shoulder most of the problems that occur in the classroom. This section looks at the difficulties of teacher as an instructional leader through training, classroom craft, technology and the position of the teacher in the organisation of the school.

2.11.1 **The teacher and classroom craft**

Teachers as instructional leaders have been perceived and trained differently over the years. Wallen and Wallen (1978:3) for example, write that "teachers in the past were concerned with controlling learners, making them responsive to schools' desires rather than the other way round." Many changes have taken place over the years.

To illustrate the magnitude of changes summarily, instruction and teaching are now used interchangeably (*Research Matters Bulletin*, 1995:1). In this study instruction and teaching are used to mean explicit, stepwise programming of information, experiences and learning outcomes, emphasizing student learning and cognitive achievement of essential knowledge (Killen & Spady, 1999:205).

In the context of education in SA and C2005, the DoE (2002: 9) document that sets out the guidelines for teachers, the Norms and Standards for Educators [NSE] of 2000, states that teachers who will be well prepared and competent to deliver C2005 will be qualified, competent, dedicated and caring with the ability to fulfill the roles described in the NSE. Further the NSE requires teachers to be mediators of learning, interpreters and designers of learning programmes and materials, leaders, community members, citizens, pastors, assessors and learning area and phase specialists

The learner centered OBE based C2005 approach to teaching and learning requires learners to collaborate in informing instructional planning by declaring their needs and clear signposts that monitor progress (course nodal stations). Learner centered education obliges teachers to show learners a whole picture of how a course is designed with directions. Teachers should also show learners alternative “pioneering” skills such as problem solving to take when course guides prove inadequate (Romiszowski, 1981:47).

Besides problem solving as an integral part of the thinking of teachers and learners C2005 subscribes to multimedia instruction and assessment. The multidimensional, contextual and continuous assessment using portfolios in the OBE approach to education imposes the need for teachers to experience the approach in their preparation as trainees for the teaching

profession (Hay & Fourie, 1999:25). Hay and Fourie (1999:25) propose that teachers would have to develop the skills of continuous assessment in the context of teaching as well and note the advantages of portfolios to learners and employers ranging from improved quality of instruction to reliability of reported achievement of outcomes, understanding and skills by graduates (Hay & Fourie, 1999:26).

Poloni (2001:35) suggests that instructional technology will greatly assist the complex learning that teachers have to provide and proposes that the teachers should create a positive school climate and culture that includes making use of computers and information technology regularly in school. In the same breath, Poloni proposes that teachers have to lead because teachers' instructional manner, patterns of classroom instruction have remained more or less conservative and consistent over years. A pertinent question that could be asked is: With what ease and difficulties have instructional leaders made the necessary transformation to C2005 and its modes of instruction.

The use of technology has to also be understood, as Erhard (1976:10), for example, sees classification of instructional media as a problem of discipline of education science. General science of instruction is regarded as similar to science of teaching and learning aids or instructional science.

In what appears to summarise the list above, *Research Matters Bulletin* (1995:5) proposes that effectiveness in teaching is determined by two constructs, which are complementary; active learning time and quality of instruction. The interface of the two constructs forms the essence of effective teaching. Furthermore quality of instruction refers to the extent to which the teacher makes it easy for the pupils to achieve the intended outcomes.

Some literature on instruction and intended outcomes has also focused on psychological aspects of instruction like supportive environment, values, expectations, emotions and the learner's past and their reinforcement on learning (Evans, Evans, Gable & Smidt, 1991:7). At the same time *Research Matters Bulletin* (1995:6) asserts that effective teaching results from training and experience. Arcaro (1995:102) and Hay and Fourie (1999:25-27) corroborate this assertion in the context of SA and in C2005, yet questions that can still be asked about teachers in SA are; with what ease and difficulties are teachers using what they know to enhance learning in C2005 and to keep learners on task? Squelch and Lemmer (1994:5) show that the training was not done adequately.

Teachers also share the responsibility for the discipline of learners with the principal in some cases. However based on their job description, teachers take more responsibility for discipline through the teachers' responsibility of being an authority figure in the classroom and in the context of setting standards of expectations for learners, in drawing learning programmes and recording learners' performance in portfolios (Jackson, 2003:4).

If teachers had sufficient training on standards and expectations, they would have been exposed to the NQF requirements and the evaluation that is based on formative feedback (DoE, 2002:3-10). In the event that teachers have not had sufficient training, the question is; what difficulties do they face in their implementation of C2005?

Finally to conclude the classroom functions of teachers there is the need for teachers to master assessment of learners' work in C2005. The content of C2005, that instructional leaders had to be trained to assess internally in C2005 at the time of writing was planned to comprise 75% of the learners work. The externally moderated assessment carries 25% of the total mark. While it was initially necessary to use equivalence of percentages against

new descriptive grading of performance, the aim is to eventually have only descriptive grading of performance in time. The grading has 70% and above as excellent and outstanding performance, 50-70% and above as achieved, 40-49% as partially achieved and below 40% as not achieved (DoE, 2002:1-10). The question is: with what ease and difficulty have instructional leaders carried out assessment in C2005? Indeed, assessment in C2005 is very central because it is essentially used for improvement of teaching and learning and to facilitate giving learners more opportunities to learn.

2.11.2 **The TIL and Learners**

Since some of the difficulties that teachers experience directly relate to learners, it is reasonable to reflect on the teacher-learner encounter. Moreover, the TIL in C2005 is required by the NQF to adopt a learner-centered approach to education. The teacher is required to use all his/her leadership and managerial skill, knowledge and habits and attitude in the promotion of learner-centered approach to learning and teaching. The TIL should motivate learners to be innovative and to take responsibility for their education.

Burke (1995:42) has been writing about the UK where OBE has been developing. From his writing he expresses the belief that the learners' assumption of responsibility for their own learning is a natural consequence of OBE approach to learning. Burke (1995:42) makes a point that the future of learners taking responsibility for their own learning is highly valued by further education and employers. Moreover, when learners take responsibility for their learning, they allow teachers' flexibility and use of efficient learning modes, maximizing effective use of time and physical resources by teachers.

Burke (1995:42) further states that learners' assumption of responsibility for their learning is supported by a period of induction when the learners become familiar with the course requirements, action planning, recording and reviewing achievement on a continuous basis. In the SA context, C2005 envisages a democratic learner who has compassion for society, who is fair and has integrity. However to achieve these qualities in learners emphasis has been placed on teachers' work. The difficulty in SA is that there has not been any induction to encourage learners to take responsibility for their learning in C2005 implementation (DoE, 2003:8).

This point about responsibility may well explain how discipline could be improved in SA schools. Indeed in 1998 the government Gazetted "guidelines for a code of conduct for learners" (DoE, 2004: 6). This was commendable. However a question that could be asked is: what difficulties do instructional leaders experience in implementing the code of conduct for learners?

In any case student-centered approach means developing skills, knowledge, attitudes and values in learners, which will help them to cope, to be flexible and adaptable. Student centered approach means to demonstrate high proficiency with respect to skills of problem-solving, interpersonal communication time management, team work, project management, survival in a competitive world market Harvey (in Stefani, Clark & Little John, 2000:163).

In C2005 teachers are expected to facilitate critical cross-field outcomes at all levels of education including the GET. Since achievement of the outcomes cuts across learning areas and requires much reflection, teachers need to collaborate with one another to design learning programs that should in turn promote learners' ability to think logically and analytically as well as holistically and laterally (DoE, 1997:8). Obviously, it can be inferred

that in order to help learners to develop the skills, teachers should be competent in the skills, knowledge, attitudes and values themselves and be able to guide learners through programmes to develop them.

Teachers' understanding of C2005, curriculum development, development of learning programmes should put learners first, recognising and building on their knowledge and values, lifestyles and experience, responding to their needs (DoE, 1997:7). The TIL should recognise different styles and rates of learning and accommodate them through his supervision of teachers, in learning situation in pursuit of attainment of qualifications by learners. One resource that has proved very helpful in urging learners to perform at high level is the pool of the community and parents. But the final responsibility for classroom performance still lies with the teacher.

Marzano, Pickering and Pollock (2001:3) contend that teachers can use instructional strategies that have been proved by research to work, in a way that maximises student achievement. According to these authors, instructional techniques that teachers can apply can bring big gains in learning by learners (Marzano, Pickering & Pollock, 2001:3).

Besides strategies, instructional leaders have to address learners' needs. Even the latest brain research output has confirmed the importance of personal needs of self-preservation, security and emotional satisfaction in self-motivated learning (Nicoll, 2002:36-40; Sorgan, 2001:10-15). Needham et al (2003:270) define motivation as the combination of forces and personal strength that initiate, sustain behaviour towards a goal and observe that people are motivated when their needs are met. Needham et al (2003:270, 287) imply that teachers would maximise learners' learning by addressing their needs in the learning process. They further listed activities that teachers could use to achieve, increase and sustain high levels of motivation in learners:

a) focusing on desirable objectives;
b) encouraging the development of positive motives;
c) creating a warm, orderly atmosphere;
d) using learning sets and advance organizers; and
e) providing incentive and/or punishment where necessary.

Moll (2002:4-7) explains the presumption that C2005 has adopted constructivism as a guide for both the DoE and classrooms. The summary of the details that Moll captured from the DoE are presented in a table. This presumption has been elaborated and shows that curriculum is presented whole and relies on primary data and manipulative materials. The learners interact with teachers developing and taking responsibility for their learning, while teachers continuously monitor learners' progress to inform improvement and effective learning (Moll, 2002:7).

The learners' interaction highlights the fact that the other side of learning, which is teaching or instruction, takes place in context, teachers have to be very much aware of the conditions under which learners maximise their learning. According to Mortimore (1993:292), to make matters worse, learning theories in the past have been the work of psychologists like Piaget (1955) and (Caroll (1963) rather than educationists. However, Mortimore (1993:292) notes that Piaget proposed stages of psychological development for children, assimilation and accommodation.

Mortimore (1993:292-3) went further and proposed that what was known about effective learning in the 1990's consisted of the inference that:

- learning is active rather than passive;
- it is complex rather than simple;
- is affected by individual differences among learners; and
- is influenced by various contexts.

While there are different conditions that would enhance learning, such strategic principles could only work when teachers are prepared thoroughly and the capacity of learners is stated. It is of prime importance that teachers master psychological principles in order to make continuous change and quality delivery of C2005.

2.11.3 **Psychological principles of teaching**

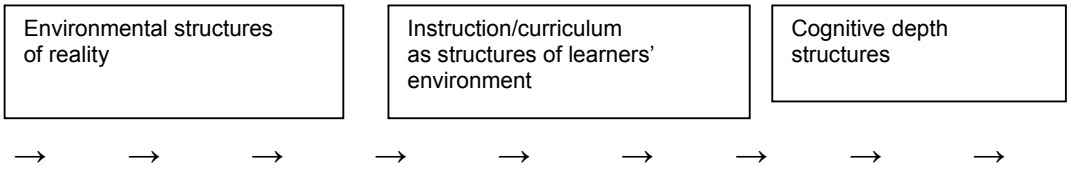
Moloi (2002:4-5) argues that for the present changes to be sustained, all those who are involved have to be reflective and innovative leaders who understand learners and the changes that are taking place in learning all the time. Curriculum designers on their part also have to understand the demands on instructional leaders and provide for these developments in their curriculum design.

Lenzen (Heidt, 1993:68) articulates the complex instructional situation as having socio psychological implications; the core of the situation is always the learner and his/her cognition in relation to the operational object. Learning functions have to be understood to form a logical succession of activities in the mind of the learner. From this perspective instructional analyses are analyses of cognitive structures. There are two main structures, depth of the subject – cognitive organisation of the individual and the structure of reality (particular factors) and features of human environment Lenzen (Heidt, 1993:68; Van Wyk, 2004:11-17). For learning to take place instructional reality is transferred to structures of human cognition. This would have to be the case with the skills, knowledge, attitudes and values that the OBE driver C2005 is to inculcate in learners.

Learning takes place when structures of the environment are transformed to cognitive structures in the minds of learners. The transformation takes place on condition that the learner defines the environmental structures as useful, to be transformed into learning activities of the learner (Heidt,

1993:71; Weimer, 1993:13). The teacher makes the structures simple for the learner even though the learner may not be aware of such simplification as shown in the displayed in Fig. 2.6 below.

Fig. 2.6 How teachers structure and transform material to be learned



(Heidt, 1993:82).

Heidt's (1993:71) analysis of learning is in line with the findings of cutting edge brain research that has been done with the latest neuro scientific scanning technology, and appearing under technical names such as Positron Emission Tomagraphy Imagery (Sorgan, 2001:1-2) and Functional Magnetic Resonance Imaging (Goswami, 2004:1-5). While the brain researchers cited above advocate cautious use of their research findings, research findings imply change in the learner's perceptions and teacher's cognitive processes and have implication for SA assumptions about education within C2005. In fig 2.6, learning would entail teachers helping learners to transform skills, knowledge, attitudes and values to cognitive structures.

Williams (2003:14-15) provides a summarised version of further and different theories of child development and learning styles that are based on psychological studies in table 2.3 below.

Table 2.3 Selected theories of learning styles

PREFERRED LEARNING STYLE	MAIN THEORIST/S	SUMMARY
Kolb's experiential learning cycle	**DA Kolb**	Kolb has four models of experiential learning based the cycle running between abstract conceptualisation and concrete experience. This is used to identify four different types of learners: converger, accommodator, diverger, and assimilator.
Multiple intelligences	**Howard Gardener**	Each individual has seven distinct areas of intelligence: linguistic, logical-mathematical, musical, bodily kinaesthetic, spatial, interpersonal, and intrapersonal. Gardener believes that an individual's abilities will differ in each area, as will their learning style.
Instructional preference	**Dunn &Dunn**	The learning style reflects how five basic stimuli affect an individual ability to perceive, interact with and respond to the learning environment. The five stimuli are: environmental, emotional, sociological, physiological, and psychological.

(Williams, 2003:14-15)

When the theories that are presented in the tables above are looked at together, they highlight what teachers have to understand about psychological developments of the learner. They also form the basis of preference of styles and understanding of best practices that teachers would bring to collaborative discussion as an input to curriculum design. These have to be understood by curriculum designers in their engagement with the psychosocial conditions and the needs of learners in C2005. These details beg the question of what ease and difficulties instructional leaders experience in broadening their psychological understanding of relevant theories of learning that are pertinent to the implementation of C2005.

2.11.4 **Evaluation of the instructional leadership role of the teacher**

Evaluation of the role played by all stakeholders in instruction will show whether the outcomes that the DoE has planned are achieved. Efficiency

of translating the OBE driven C2005 to learning programmes and classroom lessons can be evaluated through several approaches.

The first approach would be to look at whether teachers are now achieving expected outcomes. If learners' achievements of outcomes are not satisfactory, then one could look at the whole educational system; organisational positions and functions of the teacher in the delivery of C2005 expectations, to identify where efficiency is lost. An appropriate question to ask is: With what ease and difficulties are teachers evaluating learners in C2005?

In terms of the position of the teacher in the organisation of education and the teacher's functioning, the TIL has been prescribed many roles by the National Department of Education (NDoE). Principally, s/he is the employee of the Ministry of Education. S/He is a public servant. The implication is that s/he is a purveyor of government education policy instructions. The DoE has prescribed the functions of the teachers through the COTEP and NSE among others. According to the prescribed standards, teachers should be self-directed professionals, with foundational, reflexive and practical competences of implementing C2005 (Harley et al., 1999:19).

Moreover, the FSDoE proclaims that the type of teacher who is expected to deliver C2005 efficiently would be a transformation agent, competent, qualified, dedicated and caring. Furthermore, teachers are seen as mediators of learning, interpreters and designers of learning programmes and materials. They are seen as administrators and managers, scholars, researchers and lifelong learners. They are seen as, pastors, learning area specialists, assessors, community members and citizens (DoE, 2003:9). The large number of functions leads one to question the DoE and teachers the extent to which the DoE has facilitated teachers' work through policy measures and sufficient training.

A summary evaluation of performance of teachers in all the given roles and functions can be made at the policy level, where teachers could experience difficulties with official policy expectations. For example, teachers occupy a subservient position of employee of the DoE, yet the DoE officials expect teachers to direct themselves and act professionally in discharging their duties and disseminating knowledge (Harley et al. 1999:19). The question is; with what difficulties are teachers working within this legal power structure?

When one looks at another case of non consultation in the current Whole School Evaluation exercise for example, the DoE has excluded instructional leaders from policy discussion. The DoE has already proceeded to draw up an appraisal document for a teacher without discussions with teachers. The Whole School Evaluation system evaluates the following: Functionality, management, governance, quality of curriculum and learning, safety, infrastructure and parental participation (Directorate: Quality Assurance, 2002). Ideally evaluation of teachers would have to look at the performance of teachers as part of the school curriculum team, and individually as curriculum designers in the classroom. This is not the case in the WSE. Rather teachers are being evaluated.

It is also expected that in C2005 assessment will be carried out through multi media and evidence kept in portfolios (FSDoE, 2000). Teachers will also be evaluated on the basis of their learners' performance in the Terminal Assessment or Externally Moderated Assessment that comprises 25% of all the learners' assessment for certification of their Senior Phase Band on the NQF (for grade 9).

Notwithstanding these areas of evaluation, teachers have not been trained for most of the functions that they are expected to discharge. For example

they are not trained to be reflective action researchers in the OBE driven C2005 design, implementation and evaluation. Most senior school personnel and teachers have received minimal or no training as learning area specialists and assessors in OBE driven C2005 (Lewin et al., 2003:315-317). A review in the newspaper, Business Times (2005:3) has also confirmed that there is a discrepancy in the ways in which C2005 designers and teachers understand the curriculum.

Official reviews in the form of evaluative research on teachers by Chisholm (2000), and independent critiques, for example, by Jansen and Christie (1999) has confirmed that in spite of teachers' willingness to discharge the roles that policy makers have prescribed for them, teachers have had poor training. This has resulted in poor performance, and continuing inadequate alignment of policy and implementation of C2005 at GET.

Moreover, Human Sciences Research Council (HSRC) also conducted a research on teachers and found that teachers are leaving the profession because they are demoralised by poor training, poor support and resources for C2005, and poor incentive (Business Times, 2005:3). In a rather empty call, that does not promise any improvement in the teachers' conditions, the Minister of Education, Naledi Pandor's response to the trend of teachers leaving the profession has been to encourage learners to take up teaching (Business Times, 2005:3).

While the minister's efforts to change are directed at training teachers, literature suggests that the difficulties that teachers experience are also experienced by several stakeholders who are involved in the change to OBE. For this reason one wonders whether a holistic approach that is based on collaboration of the DoE at the national and provincial levels with teachers would not be the most appropriate for sustained transformation of the educational system and the whole society.

2.12 Conclusion

In chapter 2 an in-depth review of literature sources provided comprehension of desperate meanings of instructional leadership of principals, HoDs and teachers. Successes of the legislative framework for transformation of instructional leadership and training were recorded, but relevant questions were also asked to lead the research into the insight of the difficulties that instructional leaders face in the implementation of C2005. Specific difficulties include adapting the many values of C2005 into classroom programmes, complexity of OBE concepts and their practice. The structure of C2005 delivery from the DoE has also been “top down” and non participative for teachers. Instructional leadership training has been short and inadequate. The school leaders are overloaded, resources and finance are limited. New values of multiculturalism and HIV/AIDS training need to be integrated in the curriculum. These difficulties are recorded in the context of curriculum development of C2005 that is addressed in chapter 3.

CHAPTER 3

CURRICULUM DEVELOPMENT

3.1 Introduction

In this chapter literature sources about development of curriculum in general and in C2005 are reviewed. Within the review an investigation will be conducted to establish the ease and the difficulties that instructional leaders have experienced in translating C2005 guidelines and designed their own programmes for use at school level and in the classroom at GET, grades 7 to 9 (see section1.6). The focus of the review is on the sources about SA and the Free State in particular.

The processes of developing a curriculum are examined at the national, provincial and school levels where the officials of the DoE disseminate them to instructional leaders to implement them. It is noted that within these levels, it is often in the definition, understanding and application of design, dissemination, implementation and evaluation (or in the DoE format, context, inputs, processes and outputs) that difficulties often arise for implementers of C2005. Therefore the next sections turn to these levels.

3.2 Defining the concept curriculum

Educationists and curriculum specialists agree on the early origins of the word curriculum from Latin “curro” meaning “I run”, “a course or race track”. From these early ideas about curriculum Marsh and Stafford (1984:2) and Ross (2000:8) among many authorities on the subject developed the definition of curriculum as “a course of study”, “what is to be learned” (Duminy & Songhe, 1980:4).

However, lack of clarity about the scope of curriculum has led to continued use of other narrower concepts such as syllabus, selection, organisation

and presentation of subject knowledge from a specific area of knowledge. The narrower concepts have been used synonymously with curriculum, especially when referring to classroom level. Yet syllabus only refers to instructional contents prescribed for a fixed time period by educational authority or examining study chosen for a certain standard and intellectual development of a child (Marsh & Stafford, 1984:2-3; Kelly, 1987:4-5).

The concept syllabus is different from curriculum in that syllabus only refers to a given core content of what is prescribed. The classification of syllabi is tentative as the class teacher may reclassify it during micro-curriculum development. In summary syllabus is only part of the curriculum. Curriculum includes syllabus and more. Many instructional leaders however still assume that syllabus is the same as curriculum (Coleman, Graham-Jolly and Middlewood, 2003:50).

Notwithstanding the confusion in the conventional use of the terms curriculum and syllabus, curriculum theories give slightly varying versions of what the nature, underlying assumptions and scope of curriculum are as it is being implemented (Carl, 1995:31-33). This study will only select those theories of curriculum that have strong influence on instructional leadership, development of C2005 and quality assurance.

Addressing the nature of curriculum, Stenhouse (1975:3-4) claims that some educationists see curriculum as intention (plan) while others see curriculum as what happens in the classroom (reality). Stenhouse contends that the way one views curriculum affects what and how they would study curriculum (curriculum study). He asserts that the content designed by those who see education and curriculum, as reality would concentrate on studying perception, understanding and describing what is actually going on in the schools and classrooms. Those who regard curriculum as a plan would design curriculum on the basis of ideal, desirable situations of the

future and how the community would like to be. Jacobs, Vakalisa and Gawe (2004:36) fall into this group and define curriculum as an interrelated set of plans and experiences which a learner completes under the guidance of the school or learning institution.

Lawton (in Skilbeck, 1984:276) develops the view of curriculum as a plan and further asserts that at the heart of the classical definition of curriculum is the consideration of a future society so that curriculum is seen as "selection of the best and functional elements from the culture of a society". This was the dominant thinking even in SA before the major curriculum changes of post 1994 and the thinking was taught to teachers of the time. Since the changes however, some academics claim that societies are more multicultural today and challenge Lawton's thinking as being a simplistic cultural reproduction, so they propose a broader inclusive definition (Ross, 2000:10).

In response Bernstein (Ross, 2000:10-11) queries the perception of curriculum as transmission of culture on the grounds that curriculum designers could ideologically tailor curriculum to reproduce progressive, democratic or other values and attributes in future citizens and society. This transformation-oriented understanding of curriculum is shared by C2005 macro level design that aims to transform the SA society (Chisholm, 2004:195).

Bringing the various definitions together into a synthesis of C2005 documents and their operation, it is suggested that C2005 designers and DoE officials should understand curriculum to mean both a plan and action in learning programmes that are used to deliver combinations of outcomes selected from learning areas. The outcomes allow learners to progress through all levels of the NQF and accumulate credits for valued knowledge,

skill, ability, competence and attitudes that could be demonstrated and evaluated as exit outcomes (Olivier, 1998:21, 35).

The OBE tempered official definition and understanding of C2005 is different from the conventional curriculum developed by Lawton (Skilbeck, 1984:276), Tyler (1949) cited in Van der Horst and McDonald (1997:9 -11) and others. It can be assumed too that most teachers in SA who were trained before 1994 hold this conventional view of the curriculum. For those teachers the difference was in the belief that learners were to be taught to fit into determined cultural roles in future. For those who have had in service training on OBE driven C2005, there is a gap shown by the fact that there is still much difficulty and confusion in conceptualising curriculum in the OBE way (Chisholm, 2004:200).

Jacobs et al (2004:35-37, 58) insist that from an OBE theoretical perspective curriculum is, to a large extent, a collection of plans about teaching. The plans can be at the national level (macro planning), at the institutional level (meso planning) and planning at classroom level (micro planning).

Coleman et al (2003:5) and Jacobs et al (2004:53) add that there are differences between actual planned curriculum, realised curriculum and hidden curriculum. In this case the first view of curriculum is official while the second and third represent what happens in and outside the classroom. These differences are manifestations of the variance between what C2005 designers expect and what teachers implement in and outside the classroom.

Jansen and Christie (1999) caution that with the advent of OBE driven C2005, not only has understanding of curriculum changed, but studies in curriculum (Curriculum Studies) have to change in SA. Those who study

curriculum have to study the mixed political and socio economic conditions that brought OBE approach to SA and the birth of C2005. The next section looks deeper into how Curriculum Studies is undertaken generally within C2005 and at the GET phase grades 7-9 in particular.

3.3 Curriculum Studies

When OBE became the underlying approach to education in C2005, it was to be expected that the curriculum would also change the assumptions about what passes for legitimate knowledge, how arrangements have to be made to study such knowledge, and how to assess it. From this point onwards sections of this writing explore the details of perceptions, practices of curriculation and what could account for the discrepancy between intended and actual outcomes of development of C2005.

3.3.1 **Different perspectives on Curriculum Studies**

Jansen and Christie's (1999:7-9) observation of the changing studies in curriculum shows the extent of confusion that teachers in C2005 have to overcome. Following the development of C2005 designers speak the language of OBE driven C2005 that is aligned to constructivism (FSDoE, 2004:1-11).

Doll (1996:47) describes Curriculum Studies as the "study and development of theory to explain, predict and control the informal and formal content and process by which learners gain knowledge and understanding, develop skills, appreciation and alter attitudes and values under the auspices of the school".

Providing a link between the definition of Curriculum Studies and that of Curriculum Development, Stenhouse (1975:3) asserted that; "curriculum study is the base on which curriculum development is founded". By juxtaposing Curriculum Studies and Curriculum Development Stenhouse

clarifies Curriculum Studies and indicates that Curriculum Development is the applied branch of Curriculum Studies.

Carl (1995:30) supports the view that Curriculum Studies already have this strong theoretical basis and the principles that serve as guidelines to make it an independent discipline. He offers evidence in the form of the composition of Curriculum Development, consecutive ordering of courses, career education, behavioural goals and systematic approach as examples of constructs in one or more curriculum principles.

However, a further requirement for qualification of Curriculum Studies as a discipline is a pool of knowledge and specific applicable skills for the discipline to comply with subject content. In the case of Curriculum Studies knowledge and skills have been taken from other disciplines and serve as sources of knowledge for Curriculum Studies (Carl, 1995:27). The major sources of knowledge for Curriculum Studies range from philosophy, curriculum theory, systems theory, technology, subject areas, management, organisation theory, supervision, to psychology and sociology. It is from these sources that Curriculum Studies generates its own unique contents and applicable skills, which are shared with other disciplines but are particular.

Ornstein and Hunkins (1998:20-21) more or less agree with Oliva that Curriculum Studies is a fully-fledged field of study and add that for the field of study to have come of age, it must have the most advanced theoretical knowledge available in the discipline that can be generalized and applied in many situations to guide practice.

Stenhouse (1975:3) asserts that the main purpose of Curriculum Studies is to establish the principles on which Curriculum Development is based and is a condition for Curriculum Development to improve teaching and learning.

Stenhouse (1975:3-4) established his educational assumptions by proposing that curriculum ought to provide a basis for planning a course, studying it empirically and considering the grounds of its justification. According to Stenhouse (1975:3-4) study of curriculum should offer:

a) Principles;

- principles for planning;
- principles for the selection of content – what is to be learned and taught;
- principles for the development of a teaching strategy – how it is to be learned and taught;
- principles for decisions-making about sequence; and
- principles on which to diagnose the strengths and weaknesses of individual learners and differentiate the general principles to meet individual cases.

b) Empirical study of principles ranging from feasibility studies to evaluation and reform, evaluation and correction;

c) Information relating to justification; and

d) Formulation of intention or aims of the curriculum, which is accessible to critical scrutiny.

Ornstein and Hunkins (1998:1) add to Stenhouse's list of principles established by Curriculum Studies that curriculum study aims to understand the complexity of planned and emerging human purpose and social action that are the sources of curriculum.

The emphases on the process and product of curriculum and their study are different and have aptly been characterised by Van der Horst and McDonald (1997:15) as the difference between traditional or conventional curriculum and OBE paradigms. Boschee and Baron (1993:ix, 3) deepen the argument and state that OBE is a critique of the conventional education system. Teachers who trained as teachers before 1994, are undertaking in-service

training courses to change to the constructivist OBE paradigm (Chisholm, 2004:200; Jacobs et al., 2004:57-58), so that there is a gap between C2005 designers and implementers' perceptions of curriculum.

Stenhouse (1975:2) extends the discussion on the purposes and theory of Curriculum Studies and proposes that there is a gap between Curriculum Studies theorists and practitioners. However, he adds that the gap can be closed by adopting a research and development approach to one's own teaching or in groups of co-operating teachers at school level.

Stenhouse's observations on closing the gap between theory and practice of Curriculum Studies needs to be viewed with caution because questions that seemed to be fundamental to curriculum study, research and development at the time in which Stenhouse wrote in 1975 were: "How can we translate the purpose of education from society's point of view into policy then test how far and why practice has fallen short of hopes in teaching?" Furthermore, given high expectations, how can we go about trying to realise them in the classroom? (Stenhouse, 1975:3).

These questions are still relevant to C2005. Further writing in this chapter seeks to highlight the SA constitutional provisions on similar questions and issues raised by Stenhouse. For C2005 the expectations are expressed in the SA constitution (RSA, 1996:13).

Stenhouse (1975:3) raised questions about the role that education plays in meeting societal goals and plans to meet such goals on the one hand. On the other hand he also raised questions about the reasons why plans for social action fall short many times. These questions are still a theoretical link of education (curriculum study) to political, economic and social development of a nation (practical curriculum development). The questions further challenge Curriculum Studies to discover what theories underlie

practice of Curriculum Development and its political consequences (Naicker, 1999:66).

In the discussion about curriculum aims, Ornstein and Hunkins (1998:1) point out that curriculum emerges from social activity and is designed for both practical and emerging human purposes. The human purposes give rise to paradigms, their shifts and new views on Curriculum Studies and Curriculum Development. In the case of C2005 official curriculum designers have proposed a paradigm shift in official documents.

Yet in a wide-ranging research Schulze (2003:11) observed that teachers still prefer the traditional paradigm and its autocratic classroom practice. Schulze (2003:11) questions whether with SA's change to OBE, teachers are going to make a shift from how they were trained under the previous system to reflect the OBE paradigm in their practical implementation of curriculum in the classroom. As if to answer the question, Coleman et al. (2003:14) propose focusing on specific curriculum issues at the level of both policy and practice to overcome confusion in the minds of instructional leaders about what needs to change.

3.3.2 **A change of paradigm in Curriculum Studies**

The emerging human purposes of the SA society in transformation could be expressed academically through the concept of paradigm shift. The shift from studying curriculum and its development through the conventional objectives and content-based approach to OBE that underlies C2005 is a paradigm shift. The shift is to a different process and outcomes. The change has implications for Curriculum Studies because Curriculum Studies have to clarify and establish a coherent theory (Ornstein & Hunkins, 1998:1), in this case about C2005. Yet one might ask: With what ease and difficulties have instructional leaders tried to understand the theory, process and outcomes that are expected in the implementation of C2005?

In order to clarify the issue of paradigm from the start, and to facilitate the flow of discussion on the issue of paradigm shift, a brief definition is given at this stage.

Naicker (1999:43, 66) defines paradigm as “viewing the world in a particular way”. Burrel and Morgan (Naicker, 1999:45) further substantiate that one’s belief system; values and understanding of the world are located in a particular paradigm. Paradigms are exclusive**.** Burrel and Morgan (Naicker, 1999:46) state that paradigms are alternatives. One can operate in different paradigms sequentially over time, but not in more than one paradigm at the same time. In accepting the assumptions of one paradigm, one defies the assumptions of other paradigms.

In regard to the paradigm shift in emerging trends in Curriculum Studies in the SA society at systemic and organizational (macro) level, Naicker (1999:66-67) argues that the choice of OBE would provide the reason for paradigm shift by the DoE. The shift would be motivated by their curriculum policy perception, design and development, hence the change of emphasis by Curriculum Studies. According to the DoE all participants in the OBE project had to make a paradigm shift (Naicker, 1999:67).

The paradigm shift brought by OBE into the study of C2005 by South Africans will require them to include the new social values of non-racialism, outcomes and competence, equity, integration of intellectual and vocational knowledge and skills, lifelong learning on board will contribute to social planning, among others. The shift will also help with purposeful curriculum theory to guide individual orientation, manpower supply and other requirements to the country through understanding how paradigms influence Curriculum Development and social action (Carl, 1995:25).

Further justifying importance of understanding theory and quality of educational and Curriculum Development Harrow (Carl, 1995:26) states, “It is theory that provides the standard by which quality is judged”. Sound curriculum study and theorising will influence curriculum practice positively (De Corte in Carl, 1995:22). De Corte adds that curriculum study gives a rational grasp of Curriculum Development at classroom level, instruction and learning processes and can help to bring about unity of teaching and learning.

Yet to show the importance of a common understanding of curriculum (in the new paradigm), Du Toit and Du Toit (2004:3) re-emphasise Spady’s conviction that OBE paradigm refers to the viewpoint that, what and whether learners learn, is more important than, when and how they learn something, and that this view together with the actions taken in line with this viewpoint influences an education system.

The need for policy makers and implementers to understand the usefulness of Curriculum Studies as a basis for informed Curriculum Development becomes even more pressing when it is seen against the political, social and economic changes that have necessitated a paradigm shift in the view of the world and education in SA after 1990. According to Naicker (1999:66-79), a paradigm shift in SA is from functionalist old racist curriculum, to radical structuralism that is exemplified by OBE. Table 3.1 presents the summary.

Table 3.1 A comparison of Functionalist and Radical Structuralist paradigms

	FUNCTIONALISM	RADICAL STRUCTURALISM
Theory of education arising from the paradigm	Fundamental Pedagogics	Transformational Outcomes Based Education
Assumptions	Consideration of race, class religion among others	Non racist, anti class and non religious
Theory	Excludes contextual, historical and sociological considerations in the analysis of learning and teaching	Seriously considers historical, contextual, sociological and economical factors and how they could influence teaching and learning
Model practices	Apartheid education was inflexible, high-level control and ideologically driven segregation emphasised. A pass/fail approach to assessment	South African Schools Act. Flexible, Development of reflective critical thinkers encouraged. Every step is progress, no matter how small the step is, education is inclusive
Tools	Standardised tests, norm referenced testing	Criterion-referenced assessment

(Naicker, 1999:78-79)

According to Naicker (1999:78-79), the table contrasts two paradigms, functionalism representing apartheid education and structuralism representing OBE and the transformational agenda of the SA education system. The table implies that practice of OBE requires a shift of worldview by practitioners to the OBE worldview. Indeed Jansen and Christie (1999:15-17) conclude that studies on Outcomes Based Education in SA are part of a world movement concerned with curriculum and Curriculum Development based on competence, performance and outcomes. Jansen and Christie (1999:17) claim that the international OBE movement includes language of delivery, accountability, vocationalisation and market value at all levels of education system and transnational understanding of curriculum. The movement includes learned local lessons on transitional democratic policymaking and implementation. This is in line with what

Cheng et al (2001:89-90) concluded about constructivism in Asia and the world (see section 2.7.4).

Understanding Curriculum Studies and implementing the product of such study within OBE entails making a paradigm shift to focus on desired learner outcomes and the product, which refers to manifested quality of OBE inspired C2005 (Botha & Hite, 2000:131 –132; Jansen & Christie, 1999:60-62). The next section presents further details of how the term and concept curriculum development has been defined and understood conventionally and within C2005.

3.4 Curriculum Development

Doll (1996:13) points out that the concept Curriculum Development lends itself to different, sometimes divergent interpretations and the divergence gives rise to different propositions and models. This section of the research examines the different perceptions of curriculum development generally and between C2005 designers and instructional leaders, and identifies areas of difficulties for instructional leaders.

Carl (1995:45) considered many definitions and gave Curriculum Development as "an umbrella and ongoing process of systematic planning, initiation, design, dissemination, implementation and evaluation of course and content of study". Curriculum Development bridges the gap between the theory of Curriculum Studies, curriculum design and practice.

Curriculum Development, could take place at national, provincial or departmental and school levels. These levels will determine the nature of the curriculum developer's activities. It could be a committee at the national level or even a subject teacher curriculating for specific pupils at micro level (Carl, 1995:84). Doll (1996:1-2) uses the terms Curriculum Improvement and decision making for the same process of Curriculum Development.

In practice, according to Burke (1995:58), the way Curriculum Development (curriculation) was undertaken in the past, at the time of Bobbit (1916) and Tyler (1949) has not changed much. At the time the process of developing a curriculum started with the definition of the central problem of curriculum and how to address the central problem. In 1949 Tyler wrote what came to be regarded as a classic book on Curriculum Development (Burke, 1995:58; Stenhouse, 1975:3; Marsh & Stafford, 1984:5 -7). The book stated that the four fundamental questions which guide systematic Curriculum Development are:

1. What educational purposes should the school seek to attain?
2. What educational experiences are likely to attain these purposes?
3. How can these educational experiences be effectively organized?
4. How can we determine whether these purposes are being attained?

Skilbeck (1984:271) summarises two theoretical views of Curriculum Development as a process and as a product. He concludes that they can sometimes be seen as opposing views, while at other times they can be complementary. This is especially the case in relation to C2005 where OBE as a driving force and education paradigm has replaced objectives and content based curriculum, integrate knowledge and skill through the NQF and deliver them as outcomes (product) based curriculum programmes (process) (SAQA, 2000:3; Van der Horst & McDonald, 1997:18).

From the outcomes based educationists' perspective, Curriculum Development can be seen as a process that includes "all theoretical and practical planning, designing, dissemination, implementation and evaluation. Curriculum Development also means, "Streamlining outcomes within formal,

non formal, and informal schooling as well as in other employment and non-employment organisations" (Burke, 1995:36). As the DoE pronouncements declare that C2005 combines process and product, the question is; do instructional leaders understand and have they internalised the two views of curriculum regarding C2005?

From a slightly differing perspective Carl (1995:48) presents aspects of Curriculum Development comprehensively in a model. The model has four main aspects, viz. design, dissemination, implementation and evaluation. In this study it is observed however that planning transcends all curricular development – it is in this important practice that teachers were left out (and hence difficulties) when all stages of C2005 were planned (Jansen & Christie, 1999:4-5). It is important to present a short background of OBE driven C2005 to highlight its conceptualisation.

According to Jansen and Christie (1999:4-5), OBE was introduced as a result of choices made by social, labour and political individuals and groups once it was clear that SA was democratizing after 1990. Jansen and Christie (1999:4-5), name the NECC, an alliance of progressive education and labour stakeholders as the initiator of policy options investigations under the National Education Policy Investigation (NEPI). In its turn NEPI provided the framework for democratic values of non-racism, non-sexism, democracy, equality and redress as the basis for education policy, Curriculum Development and design in the new dispensation.

Besides NAPI, another contribution came from the labour movement under the Congress of South African Trade Unions (COSATU). COSATU took an initiative to produce a compromise education system, which would recognise and reward knowledge of workers without formal qualifications. The National Training Strategy Initiative (NTSI) carried COSATU's initiative forward. Consequently Jansen and Christie (1999:28-29) point at the

change in the content of Curriculum Studies to include values of the NQF such as integration, redress, access and democracy in curriculum. These values and others related to the democratic dispensation in SA will continue to change the essence, perceived function of education and Curriculum Development. It can be inferred that these changes will require instructional leadership to learn theory and practice of how to design a curriculum in a more politicised context of outcomes based education tradition. It has to be stated that the research progresses from Curriculum Studies and its paradigm shift detailed in section 3.3.2 to paradigm shift in Curriculum Development. The discussion follows the direction of the relationship between the two concepts that Stenhouse (1975:7-9) gives in section 3.3.1.

3.4.1 **Some theories of Curriculum Development**

Ornstein and Hunkins (1998:2) assert that a person's approach to curriculum reflects their worldview, their view of knowledge, philosophy, history and domains of curriculum. The authors also assert that the worldview includes development and design of curriculum, a certain perception of the roles of teachers, principals and other stakeholders.

According to Ornstein and Hunkins a person's worldview includes the views about society and schools. Levine (2002:2-4) confirms Ornstein and Hunkin's analyses and asserts that there are mainly two theories regarding nature of reality and knowledge, realist (positivist) and relativist (constructivist) theories. Doll (1996:36-39) agrees that there are two theories regarding the nature of reality but calls them Traditionalist and Progressivist, but the details are the same as those given by Ornstein and Hunkins (1998:2). Furthermore, Levine (2002:2-4) and Doll (1996:36-39) agree that theories of reality determine paradigms for curriculum development and particular definitions, goals, structure, function, and development processes of that curriculum. It can be inferred from the

foregoing discussions that the worldview is broader and includes paradigms that refer to particular understanding of particular phenomena.

Ornstein and Hunkins (1998:2-3) argue that there are two approaches to Curriculum Development; namely the scientific technical, and non-scientific (non technical) approaches (perspectives). The two theorists further sub-divide the approaches to Curriculum Development into six major schools of thought. Under the scientific perspective are placed; Behavioral, Managerial and Systems schools. Under the non-scientific perspective are placed; Humanistic, Academic as well as Reconceptualist.

Approaches to Curriculum Development could be evaluated by examining theory and practice to see whether they reflect the OBE based principles that underpin C2005 and its practice at all levels. Spady (1994:3) guides such evaluation by stating that, “a system that is based on outcomes gives top priority to ends, purposes, learning, accomplishments and results”. It could safely be said that in terms of official documents (e.g. NSE), educational and curriculum discourse, the government and institutional mechanisms of C2005 delivery to schools have changed to expressing C2005 in terms of OBE in the SA conditions (Lewin, Samuel & Sayad, 2003:28). Yet it is also the case that teachers will need extended specific training to make the paradigm shift and express OBE in action (Coleman et al., 2003:41).

Furthermore, evaluation of the SA education system and curriculum study in terms of OBE through research was until the time of writing only done at Higher Education and Training and Further Education and Training levels in 2003 (Lewin et al., 2003:xv). A systemic evaluation at the GET intermediate phase was done in 2005 but none had been done for the senior phase (FSDoE, 2005).

The crucial question for this research is: With what ease and difficulties have instructional leaders received the imperative to make a paradigm shift, understood, made the shift and implemented the emergent approach to Curriculum Development in C2005. Have instructional leaders also understood that Curriculum Development takes place in the context of the whole education system as a cultural practice? The next section briefly clarifies this context.

3.4.2 **Curriculum Development in an education system**

While the concepts systems perspective and culture are discussed in depth in sections 2.7.1 and 2.6.1**,** they are presented again summarily in this section to assist in the analysis of Curriculum Development. From the systems perspective Curriculum Development can be seen as one function of the education system that is organised to play a role in meeting the aims of the whole system together with other sub systems such as the socio economic and political sub systems of the SA state. Since the SA state in its totality is undergoing transformation, all constituent parts of the system are also transforming, including Curriculum Development (Motala & Pampalis, 2002:1).

The systems and organisational framework further includes perspectives in studies, development, types of planning and their success, interactions that occur at institutional and individual levels (Marsh & Stafford, 1984:60-61) as educational cultural processes. Finally the systems framework includes an evaluation aspect to ensure that curriculum is reviewed and developed with corrective measures built into the process of developing curriculum at all levels.

To strengthen the role of teachers, evaluation of Curriculum Development at school level concentrates on the activities that learners engage in such as learning, knowledge, skills, habits and preferences. Marsh and Stafford

(1984: 6) propose that evaluation of certain aspects of curriculum such as plans and actions be given particular emphases depending on overarching theories and value stances of evaluators.

Analytically, Curriculum Development in the present SA context can also be seen as a dynamic process, a course of study whose function is to achieve social goals, and as a means of meeting both long term and emerging human purposes. As social purposes modify very rapidly today in response to global and local pressures, so would curriculum change at the pace of these changes (Doll, 1996:40; Ornstein & Hunkins, 1998:1-2). Have instructional leaders also made parallel changes in their Curriculum Development since 1994?

3.5 Curriculum Development in SA from 1994

Jansen and Christie (1999:15-17) see the purposes of education, Curriculum Studies and development changing under the transforming SA state. The state expresses the new assumptions and expectations such as democratic practice at all levels, equity and competitiveness for the SA society that are intended to replace those of the old apartheid state and its education system (Koekemoer & Olivier, 2002:34).

In terms of policy making, concrete plans for development of a curriculum that would be an alternative to apartheid era curriculum were stated in the ANC policy of RDP (Wits & NECC, 1994:1) and in the document, “A Policy Framework for Education and Training, 1994” (DuToit & DuToit, 2003:2).

The documents presenting the eventual political choice of OBE driven curriculum over the conventional system by the ANC politicians and their curriculum advisers also contained decisions on the legislative and institutional measures anticipated to implement the chosen curriculum. However, there was little discussion on micro level Curriculum

Development, implementation, facilitation and transfer of education policy by principals, subject heads, departmental heads and teachers to new practices, Curriculum Development and quality delivery of OBE driven C2005 (Naicker, 1999:70; Olivier, 1998:31).

The statement that the Ministry of education and Training and provincial Education and Training Authorities were given responsibility for development and implementation of all aspects of the education policy (DoE, 2001:3), further amplified the omission of classroom considerations in the development of C2005. The omission demonstrated a chasm between conception and practice, policy intent and actual practice. The omission also conformed to political symbolism and regulations for change of the SA education to OBE driven C2005 (EPU [Wits], 1994:1, 9-10).

The document (EPU [Wits], 1994:1, 9-10) further states the official position that there would be a National Institute for Curriculum Development (NICD) with direct responsibility on curriculum, research, syllabus and evaluation. The allocation of responsibility for curriculum development left teachers and classroom Curriculum Development out. The document (EPU [Wits], 1994:7) mentioned priority given to training of teachers in innovative learning, but there was no mention of collaboration, collegial contribution of teachers, action research and discussion of curriculum policy and development.

In analytical terms, the systemic and organisation culture of decision-making and pattern at this point was manifestly that of power culture, centralized decision-making, institutionalisation and line management of the curriculum development process. This point is elaborated in section 2.7.4, which emphasises instructional leadership participation because it has many advantages and turning away from autocratic management of curriculum.

While Burke (1995:xv) contends that collaboration would promote openness, deepen and share stakeholders' understanding, the question in the current circumstances is: with what ease and difficulties are instructional leaders working collaboratively with all other stakeholders in the implementation of C2005?

Policy makers and managers have to take the experiences of instructional leaders about practical experiences of school level Curriculum Development into account. Furthermore, instructional leaders' perceptions and preferences predispose them for success or failure in implementing policy (Kirk & Macdonald, 2001:553; Koekemoer & Olivier, 2002:33; Steyn, 1999:206).

3.5.1 **The legislative basis of C2005**

From the point of view of the whole education system of SA, the SASA (1996) gave all the policy making power over the provision of all education to the Ministry of education. The Minister of education, who is the head of the Ministry of education, together with his/her deputy deals directly with general national education policy and governance, determination of norms and standards of education and most of the financial control, through the national department of education (with legislative Acts of Parliament).

This legal arrangement means that the choice of the curriculum, its design, including dissemination, implementation and evaluation are under the jurisdiction of the national minister of education. In the case of OBE and the integrative South African version, the NCS, the minister of education at the time carried out the government mandate. The mandate was to implement education policy and programme from the ANC manifesto. The minister of education is the cabinet arm of the party that has formed government in regard to the policies that the party puts through in terms of the office of the government. The provincial and district departments of education as well as

the school discharge details of policy implementation functions (Pretorius & Lemmer, 1998:14-16).

In spite of the power of the minister of education to determine education policy, there is a measure of mutual consultation and feedback by other stakeholders. Formal interaction has been done through the National Education and Training Council (NETC) and the Council of Education Ministers (CEM). Extra parliamentary channels of interaction and input in education policy include parents of learners, School Governing Bodies, teacher unions which give the minister of education input in formulation of education policy. Curriculum 2005 went through these ministerial channels in its design as a national education policy for SA. However it is notable that up to that level, politicians in charge of education and not classroom teachers represented teachers.

For further implementation of the education policy for C2005, the government established, the SAQA through the DoE (DoE, 1995). The government then gave SAQA the specific function of overseeing the development of the NQF. The NQF is a framework for description of qualification paths and certification.

The establishment of SAQA as a juristic person called the South African Qualifications Authority (with an act) is a government prerogative, and the government could implement it on its own without consultation. The question is; have instructional leaders come to know the functions of the two structures? With what ease and difficulties have complied with their expectations in their education delivery?

The expectations of SAQA and the NCS are used to frame outcomes and objectives in the curriculum, although there is some confusion such as that which occurs when outcomes are seen as objectives in another name (Burke, 1995:56; Skilbeck, 1984:271). Some sources point to the common

origins of the two terms, objectives and outcomes, from Benjamin Bloom's descriptive work on competence learning. Vakalisa (2000:67) in her inaugural lecture said she was "not convinced that the objectives which Tyler, Taba and other curriculum theorists of the objectives movement of the 1960s refer to with regard to Curriculum Development are different from what Spady and others mean by outcomes".

Furthermore there has been minimal involvement of teachers through official and unofficial channels such as advocacies, and labour movements in discussing education policy with the DoE. Moreover, a recent research by Dayile (2004:67-70) found poor communication between principals and teachers with the DoE, poor training and poor support for policies such as Whole School Evaluation. The same study also found principals and teachers expressing a strong desire for quality training, to confirm that quality training was not there.

3.5.2 **How policy directs curriculum design in C2005**

According to Carl (1995:48, 84 - 85) curriculum design is a stage during which planning and review of an existing curriculum is done after a full re evaluation has been carried out. As curriculum design is done in phases, it can take place at macro (national), meso (provincial) and micro (school and classroom) levels. Clearer practical details could be given in the sectors or area of concern for transformation; community philosophy of life and the community's views on education, government level and education legislation, school phase and the type of planning by the school, syllabus development, school curricula, subject Curriculum Development and instructional micro Curriculum Development in the classroom. Ornstein and Hunkins (1998:183) present a model of curriculum design and change details below.

Figure 3.1 Theory and steps in the design of a curriculum

Basic steps taken in designing curriculum

1. *Read the literature* to get knowledge of professional literature that is a pre requisite for any serious attempt to relate theory and practice.
2. *Identify the major terms* that form the major constructs, concepts, and questions for discussion by theorists and practitioners.
3. *Check the soundness of existing theories* in terms of validity, evidence, accuracy, underlying assumptions, and logic of argument, coherence, generalisability, values and biases.
4. *Avoid fads.* Theory development should follow elaborate reflection.
5. *Align theory with practice* in the classroom; it must be plausible, applicable and realistic in terms of practice.
6. *Test the theory* empirically to see if it makes common sense and is credible by trying it in practice and measuring results. It should be introduced first on a small scale, comparing experimental and control schools.
7. *Interpret theory* – the results of experiment must be interpreted in terms of realistic conditions over realistic time periods. The test must be over a period like three years to test for fading out.
8. *Modify theory and reduce its complexity*. In order to move theory from an idea to action, make it fit in with people and not the other way round. It has to be simplified if involves many people, for most of whom only simple language works.

Adapted from: Ornstein and Hunkins (1998:183)

The list in Fig 3.1, especially points 3, 5, 6, 7 and 8 could be presented in steps to serve as evaluation criteria for curriculum theory. The application of curriculum theory to guide, describe and even predict action gives rise to Curriculum Development (Ornstein & Hunkins, 1998:176).

In both objectives and outcomes approaches, curriculum design must take account of the development of the child for whom the curriculum is being designed. The child's abilities, potential and developmental needs have to be accurately established and be included as inputs of curriculum design

(Barnes, 1982:37). Carl (1995:89) goes further and states that effective curriculum design needs thorough knowledge of relevant curriculum models, various components, relevant criteria, the subject and the child.

Carl presents Cawood-Carl-Blanckenberg model (CCB model) in table 3.2 below as a synthesis model and a refinement of Tyler's model, hence it can be understood to be an objectives based model. The CCB model has many similarities with the OBE model, and the two models are compared in, Table 3.2.

In contrast to the objectives based model presented above by Carl (1995:89) however, outcomes models view curriculum design rather as developing a programme of learning experience from culminating significant outcomes which are the desirable knowledge, skills and attitudes that learners should demonstrate when they have finished the course of study (Boschee & Baron, 1993:46, 73; Spady, 1994:2-3, 23). To show how the two approaches to curriculum design compare, Cawood-Carl-Blanckenberg and OBE models of curriculum design are presented in Table 3.2 (Boschee & Baron, 1993:46; Carl, 1995:93).

Table 3.2 A comparison of two models of curriculum design

The Cawood – Carl –Blackenberg model	**Spady, Boschee & Baron OBE model**
Situation analysis	Analysis of future trends and needs of society and the pupils
Selection of goals	Identification of outcomes of significance
Selection and classification of learning experience	Designing down learning programmes, courses, units and lessons
Planning and application of instructional learning and teaching in class	Implementation of learning experience through many media
Pupil evaluation mainly on a summative basis	Criterion based authentic evaluation

In terms of the process, Boschee and Baron (1993:72-3) make a point that Outcomes Based Education (OBE) is designed down and delivered up. The big difference between the two approaches to curriculation though is the fact that the Carl-Cawood-Blackenberg (CCB) model represents refined traditional objectives based model while the OBE model is premised on real life desirable, demonstrable exit outcomes on which all other planning should be based.

C2005 has drawn the underlying ideas and assumptions to develop the SA national curriculum from OBE design (SA, 1999:340). The implication of noting the fine differences and similarities between the CCB and OBE models for curriculum designers is that instructional leaders have to develop a deep understanding of the difference between the objectives and competency (OBE) models.

According to the *Discussion Document* (DoE, 1997:5) the underlying educational, political and economic values of C2005 include transformational curriculum with many expectations such as the redress of past inequalities and other national aspirations.

The ANC policy of RDP has also contributed to curriculum design of C2005 by making education provision and transformation a priority issue wherein the core values and principles of democracy, equality, liberty, justice and peace would be promoted through the education system (Pretorius & Lemmer, 1998:1). Pretorius and Lemmer (1998:1) cite the RDP white paper (DoE, 1994) and first white paper (DoE, 1995) and the provisions of the constitution (RSA, 1996) and the SASA (1996) to support their assertion that C2005 is based on the values and principles of democracy and others. These legislative documents indicate the important role that the state plays in the development of C2005.

A similar role and curriculum replacement approach was developed to solve the problems of poor performance in schools in United States in the 1980s (DoE, 1997:5; National Commission on Education Excellence, 1983). The approach later spread to many parts of the world including Canada, Ireland, Britain, New Zealand and Australia.

Moreover in regard to SA, Botha and Hite (2000:130) support the expectations that OBE would solve the problems of poor performance with a claim that OBE has been successfully implemented in the United States, New Zealand, Australia**,** Canada, Britain and Ireland. They claim to have evidence that OBE solved the problems of poor performance and mass education similar to the ones that SA is experiencing presently.

It was in this spirit of addressing mass education that the SA education system was designed and based on the principles of the White Paper (DoE, 1995) and (DoE, 1997:5) that OBE was adopted. It was adopted to fulfill the government aim of developing an education and training system for the benefit of all SA and its people.

In practice, NCS was drawn with improved design features as a streamlined and strengthened curriculum guideline following its first review in 2000 (Chisholm, 2001:15-18). In 2002, C2005 was revised further to simplify the curriculum and to give time for training and preparation for its implementation. From then it has been called the National Curriculum Statement (NCS) and has been implemented from Reception to grade 3 in 2004. Grade 9 will be implemented in 2007. The revised version is based on the same OBE principles as the original C2005, which is why the title C2005 is still an accurate reference to the curriculum.

The education system is designed to provide a curriculum for public and independent schools (GCIS, 1999:341). Principles relating specifically to

curriculum design include: Human resource development, learner centeredness, relevance, integration, redress of past disparities, progression, critical and creative thinking, credibility and quality assurance (HSRC, 1995:10 – 11).

This study is relevant because it focuses on the SA education system and addresses the unique SA history, socio economic circumstances and context of Curriculum Development. It is suggested in the study that the difficulties that instructional leaders experience in implementing C2005 could be encapsulated in the questions about their mastery of the principles of OBE, programming (design) and delivery of C2005. School level design and delivery of C2005 are discussed further in the next section.

3.5.3 **School level design of C2005**

The design features of GET Band were developed after the review of C2005 in 2000 by a Review Committee which had been given the terms of reference to streamline and strengthen the curriculum and have the following characteristics (Chisholm, 2001:3-5).

In terms of the structure, the C2005 would have eight learning programmes based on eight learning area statements at the senior phase of GET. The learning programmes are: Sciences, Technology, Social Sciences, Arts and Culture, Life Orientation and Economic and Management Sciences. Language and Mathematics would each be allocated 25% and 18% of all weekly contact teaching and learning time respectively. This is because the learning areas are regarded as gateway subjects. Besides the two learning Areas, language and mathematics contain factors that facilitate learning of other learning areas – we use language to learn other programmes, while figures in mathematics quantify details of other learning programmes (DoE, 2001:17-18).

At the GET level curriculum would deliberately promote principles of social justice, healthy environment, human rights and inclusion. The latter is achieved through specifying minimum requirements for all learners and sensitivity to limitations of learners that are provided with adaptive and alternative assessment methods (DoE, 2003).

The requirements of C2005 could be identified by learning area statements and Learning Programmes. Learning area statements give rise to learning programmes which contain details of sections that form introduction, process and assessment of learning outcomes. Assessment standards indicate when outcomes have been achieved and the level of achievement (DoE, 2002:1-3).

C2005 emphasises process and product of learning in its implementation. The process and product are outcomes that are included in the achievement that can be demonstrated at the end of learning. Learning at senior phase is less contextual. It is more abstract and more area specified than in the elementary and intermediate phases. At the same time there will be clear evidence that the learners are being prepared for working life, lifelong learning and citizenship. Learners will be exposed to opportunities, rights and responsibilities and be prepared for the option of continuing with studies through to FET or proceeding to vocational institutions or even working (DoE, 1997:13) and (DoE, 2003:10-11).

When one looks at the whole education, and the relationship of parts to the complete structure of the senior phase (GET), C2005 comprises the National Department of Education that determines policy on learning area statements and learning programmes. Learning programmes provide guidelines, schedules, pacing and sequencing of activities per grade for implementation by teachers. These are given to schools for implementation and assessment. Furthermore learning programmes have exemplars of

lesson plans (DoE, 2003:14-17) and time allocations for each learning area or programme. These documents leave no chance for teachers to design curriculum the way they understand classroom conditions.

The guidelines also emphasise integration across learning areas and progression from grade to grade. Learning area statements and learning programmes will promote integration within learning areas while levels of critical and developmental outcomes and assessment standards will promote progression (DoE, 2002:4).

C2005 is sensitive enough to provide guidelines for socio economic and political situational factors that form the context of problems, trends, forces and consequences of intervention in the curriculum design work of instructional leaders. What emphasises variance between C2005 designers and instructional leaders is that instructional leaders themselves bring a historical, psychosocial baggage that has to be understood in order to deal with it for the good of implementation of C2005. These refer especially to their training, their perceptions about themselves and their abilities to cope and make a difference in the classroom (Niehaus, 1996:109 – 110).

While it is clear that the whole complex process of design and implementation requires training, written documents point at several available short and long term strategic measures that could be used to prepare teachers to deal with implementation problems. The most central method that had been designed to deal with training of teachers continued to be the 'Cascade model' which was implemented with limited success and left teachers still confused about how to develop C2005 accurately (DoE, 2000:7; Pithouse, 2001:154).

Otherwise, the design features of C2005 come out more clearly in the documents such as the report of the Review Committee on C2005 that was

published in 2000. Yet it is as important to understand the details of classroom practice where instructional leaders encounter problems on a daily basis and have to solve them.

Classroom design of C2005 at the time of writing is ambiguous and manifests contradictions. On the one hand is the implication that OBE is democratic, learner centered and interactive. On the other hand is the prescription that at all levels of the curriculum, the design of the curriculum should start with clear outcomes (Spady, 1994:2). Coupled with this fundamental contradiction, are specific requirements of SA from OBE and its adaptation to local conditions.

In SA however, the provinces have been busy reviewing C2005 and presenting on-line curriculum design that comes from the province and local education support personnel, and also presents teaching aids. Teachers have reported finding these efforts inadequate and in most cases inaccessible at school level. These limitations have not helped teachers (Reeves, 1999:48-52). Teachers have found themselves resorting to old methods of teaching (Coleman et al., 2003:117-122). A question that could be asked is: With what ease and difficulties are teachers receiving disseminated information and implementing C2005 with limited resources?

3.5.4 **Dissemination of C2005**

At macro level, curriculum dissemination means spreading information about a new or modified programme before it is implemented so that those who are to be affected by the programme know about it beforehand (Carl, 1995:135-136). Carl (1995:135-136) identifies three important conditions that make good dissemination of curriculum imperative, viz; the first condition is that curriculum succeeds in its implementation because among others, it was disseminated effectively. The second condition is that dissemination creates good environment and institutionalises curriculum.

The third condition is that dissemination empowers and motivates implementers. These conditions show that the line between dissemination and implementation even in this discussion is very thin and non existent sometimes.

Concerning the role of dissemination in education programmes, Carl (1995:135) writes that “it is of cardinal importance that each person in the teaching organisation is kept fully informed and involved” so as to validate decisions and ensure optimal implementation capacity. The HSRC (1981:110) called dissemination one of the key set of activities in the whole process of curriculum development. The HSRC (1981:110) saw it as a pre condition for successful curriculum implementation and determinant of the manner in which curriculum is received.

However, it is at the stage of dissemination where policy planners must already think out ways of overcoming resistance. Instructional leaders are likely to resist a programme that did not include them in its design. Resistance could be dealt with by addressing the concerns of those who are affected by the new programme such as teachers. Their concerns would range from imagined to real change effects. They would include changes in personal circumstances, consequences and new roles in the new team, routine and possible personal contribution and how to manage these (Carl, 1995:139).

Havelock (Carl, 1995:149) proposed two models that are related to the ideas that were discussed earlier that underlie dissemination of curriculum. One model is “Research, Development and Diffusion (RDD). The other model is the Problem Solving model”. The RDD model seems to have found favour in SA over the years even though it is a “top down” model.

In the RDD model there is no recognition that teachers tend to work with culture and personal networks at the GET band senior phase level. Policy implementers should aim to understand these socio cultural tendencies and preferences of instructional leaders, as they are very important in facilitating implementation (Havelock in Carl, 1995:151). Harley et al. (1999:126) confirmed this point when they indicate that teachers will accept innovations on two conditions. Namely that they work in class and that they fit in with their national cultural identity.

In regard to dissemination of C2005, Jansen and Christie (1999:10) remarked that dissemination of C2005 was done haphazardly. What were given in terms of dissemination were information sessions – when they were supposed to be OBE training programs. This has caused problems that led to the review committee of C2005 in 2000 (Chisholm, 2000), (DoE, 2000:1-3).

The RDD model is mixed with two others described by De Villiers (Carl, 1995:152-3) as the centre and periphery, and Ruddock and Kelly model. The centre and periphery model disseminates information from the “top down” and from the centre out to the periphery. The Ruddock-Kelly model includes using many channels of communication, transferring information and re educating to change attitudes for implementation of curriculum.

To emphasise the importance of individual understanding, Havelock (Carl, 1995:151) observed that research on pointers of successful daily dissemination of information and daily activities is demonstrated by following three generalisations among others, viz; individuals identify with the network of social relationships of new programmes. Individuals (or network must be inclusive) have to be sufficiently versed in the language of new organisation, in this case in the language of C2005.

In this regard, the Free State has disseminated information on C2005 in the form of advocacies and trialing as well as piloting of materials and exemplars received as instructions from the DoE, in certain pilot schools in the Free State at the GET band. Dissemination has taken the form of "top down" process. The writer attended two advocacy sessions on the 24th and 25th July 2001 at the Sentraal Primary School in Bloemfontein. It can be inferred from the foregoing discussion that the DoE has used a mixture of the RDD and Raddock-Kelly models in disseminating C2005, albeit as Jansen and Christie (1999:10) observe, haphazardly.

Moreover, the researcher learned from the opinions of two principals and two teachers in informal discussions, that a big number of instructional leaders attending the dissemination advocacies wanted the training that they were given to be mixed with a "bottom up" approach to facilitate implementation. Yet the test of whether dissemination of C2005 succeeded is in whether dissemination facilitated effective classroom implementation of C2005, which is the next step of curriculum developmnent after dissemination.

3.5.5 **Implementation of C2005 in the classroom**

Implementation of C2005 crucially refers to the realisation of all plans to change in the classroom. This stage is linked closely to dissemination so much that most of the literature and practitioners see it as a continuation of dissemination. Carl (1995:168) includes the following factors as very important for successful implementation of a new education programme: teacher development, involvement in implementation, participation and the relationship of confidence between the policy makers, implementers, principals and teachers in the classroom. The other inputs are supporting resources such as finance, equipment and infrastructure.

For C2005 in SA, Table 3.3 below shows that at the time of writing, the implementation timetable for had already been drawn.

Table 3.3 The implementation timetable for C2005 (also called NCS)

1996/1997 The process of designing Curriculum 2005 and its piloting in grade 1	**2003** Implementation of C2005 In the old form in grade 6. Training teachers in the NCS, development of textbooks and support materials based on the NCS.
1997 C2005 became national policy for all schools	**2004** Proposed implementation of C2005 in the foundation phase (grades R –3) continued training of teachers on NCS and development of support materials.
1998 C2005 Implemented in grade 1	**2005** Proposed implementation of NCS in Intermediate phase, grades 4 – 6, ongoing training and development of support materials.
1999 Implementation of C2005 in grade 2, piloting in grade 7	**2006** Proposed implementation of NCS in grade 7, ongoing training and development of support materials.
2000 Implementation in grades 3 and 7	**2007** Proposed implementation of NCS in grade 8. Ongoing training and development of support materials.
2001 Implementation of C2005 in an unrevised form in grades 4 and 8. Development of a revised version of C2005, National Curriculum Statement (NCS)	**2008** Proposed implementation of NCS in grade 9, ongoing training of teachers and development of support materials
2002 Implementation of C2005 in the old form in grades 5 and 9. Grade 9 writes exams to obtain General Education and Training Certificate (GETC)	

(*The Teacher*, 2001:20)

The timetable reveals that implementation of C2005 would still be fast. It was expected to take 3 grades at a time. The implementation would take single levels from grades 7, 8 and 9.

Carl (1995:168) indicates that success of curriculum implementation is largely determined by the quality (that is discussed in details in chapter 4) of planning, design, dissemination which is done beforehand. He calls for involvement of consumers (teachers), credibility and acceptable response to

learners. In this call he is close to educationists who claim that success of curriculum implementation can be measured by how much it meets the needs of the society and those of the pupils. Carl (1995:168) calls for clear communication of roles, terminology, answering queries and evaluation as well as remuneration of instructional leaders for their efforts in innovation and implementation of curriculum.

Some educationists claim that OBE in itself is a quality curriculum, based on its laudable nature and methods. They claim that OBE is based on real life situations and is interactive in its implementation. Moreover, Spady (1994:41) among others, has argued that OBE is compatible with theories of Total Quality Management (TQM) and quality assurance.

Moreover, to accentuate the very high socio-economic and political expectations placed on OBE driven C2005 in SA, the National Economic Policy Initiative (NEPI, 1993:7) asserted that "international evidence showed that societies which develop good education systems have a better chance of sustaining economic growth and development through individual productivity and redistribution of income to the educated". Van der Horst and McDonald (1997:5) among others support the assertion that "sound educational policies and their proper implementation have the potential to improve the quality of life of the inhabitants of a country".

Carl (1995:170) concludes that success of curriculum implementation can be assumed when teachers have been empowered to appropriate the process of change and drive it. Participation and co-ownership of curriculum by teachers can be achieved through professionalising teachers with training in SA in regard to implementation of C2005. Yet, in a critical reflection of the culture of teaching and learning in SA, Harley et al. (1999:127) conclude that teachers in SA have been used to the culture of looking up to the administration to give them instructions. Harley et al.

(1999:127) charge that the culture of dependence by teachers is a legacy of the autocratic past and training of teachers. They anticipate that the success of C2005 will depend on the change of this culture to teacher professionalisation and participation.

Besides the change at teacher level, other levels also have to change. In this regard, Carl (1995:35) states that in practice curriculum implementation, incorporates change, and takes place at many levels in a planned or unplanned manner. These levels are:

- The level of the community where the philosophy of life that serves as a premise for education and subject choices is espoused.
- Government level where legislation to make provision for the implementation of educational considerations is implemented.
- School level where there is particular planning to implement programmes.
- Classroom level where lessons are delivered.

From the OBE perspective at the conceptual level, curriculum implementation can include a comparative element between different systems such as OBE in other countries. In respect to OBE, curriculation is realised in a certain way that emphasizes outcomes. Killen and Spady (1999:205) write: “Curriculum design and implementation must ensure that learners systematically develop those managerial skills that learners must possess and demonstrate successfully to carry out the five major life roles”. Implementation of C2005 in SA in stages though grades since 1998 has been in line with this logic. For example, to develop these managerial skills in learners, C2005 then given the title NCS was implemented at the early level of learning (grades 1-3) in 2004.

To ensure that this learning takes place, training of teachers also continues with programmes that are supposed to be an improvement on the cascade

model (usable plan). At the time of writing the sessions were called “train – reflect – train” (Potenza, 2002:9). The changes of training models continued to take the format “top down” and its attendant limitations. The changes underline the need to ask; with what ease and difficulties are teachers using the changing models to implement C2005?

To confirm the many changes, Olivier (1998: 44), Mda and Mothata (2000:33-35) offer models that they claim would help teachers to draw their development programmes. The models are similar in details to those developed by Oliver (1998:44); the model designed by Olivier (1998:44) for C2005 development in the classroom is given below in Table 3.4.

Table 3.4 Principles of writing outcomes

Learning programmes	Outcomes	Knowledge, skills and Processes include:
Critical outcomes Developmental outcomes	Details of outcomes are expected to be in the order: Noun +Verb+qulifier	Preparing, Performing, Concluding, Interaction and Assessment.

(Olivier, 1998:44).

The strength of the model lies in its presentation of a complete range of details from planning, implantation to evaluation of C2005 under the processes heading. The model also involves interactive learning and authentic assessment that conforms to the explanation that Olivier (1998:47) gives for designing programmes generally. In practice this model covers almost all the steps of translating guidelines to classroom lessons.

3.5.6 **Examples of translating guidelines into programmes**

However, in order to highlight the difficulties that instructional leaders face in translating C2005 guidelines to classroom lesson plans and lessons, two learning areas, Language and Mathematics and science have been used.

The two learning areas have been chosen because they are regarded as prerequisites for learning in other areas.

Above all though, the DoE emphasises that all teaching and learning from grade R to 9, inclusive of the two selected to give an example, should contribute to the type of learner envisaged by the C2005 (DoE, 2003:19-21). In this regard, specific learning area curriculum guidelines call for each teacher to address their learning programmes in a way that would be easy to implement and evaluate. While the guidelines assume that teachers will have the capacity to use guidelines, the question is: With what ease and difficulties are teachers interpreting and translating guidelines into effective classroom programmes? To determine the extent of the problems, first the research explores teachers' programming in Language.

The Pan SA Language Board and Umalusi (DoE, 2003:19-20) state as a matter of policy on language that SA is a multilingual and multicultural society, hence, the language learning areas statement includes all eleven official languages; Sepedi, Sesotho, Setswana, SiSwati, Tshivenda, Xitsonga, Afrikaans, English, isiNdebele, isiXhosa, isiZulu. The Language Board has also included Sign Language and Braille as approved by the DoE.

The Statements follow an additive or incremental approach to multilingualism. In this regard, all learners are required to learn their home language, and at least one additional official language. The expectation is that learners become proficient in the additional language while they retain and develop their home language. The expectation implies that particular Language teachers are needed to serve schools in particular language group settlements (DoE, 2002:4). The implication is that the language specialist may not be the same as the instructor for other learning areas taught regularly. All the assumptions miss the context of SA schools.

The main outcomes in the language learning area (also referred to as Language Literacy and Communication [LLC]) are: Listening, Speaking, Writing, Reading and Viewing. Others are Thinking and Reasoning, understanding and ability to use Language structure. Competence levels required for grade 9 emphasise effective communication and mastery of skills in the outcomes to allow the learner to utilise the skills in a wide range of situations. The statement also indicates that these will be learned in an integrated manner. Furthermore, the learning area is allocated 25% of all the learning time of each learning week (DoE, 2003:18-19).

Notwithstanding these positive plans about content and time allocation for C2005, curriculum prescriptions that are contained in the guidelines for teachers leave a very small opportunity for teachers to write programmes (plan lessons, schedules, pace tasks, select means of delivery and assessment) for classroom activities and curriculum delivery. Learning-teaching areas specialists in the provincial education department are supposed to help teachers in the implementation of language curriculum under determined structure.

Jacobs et al. (2004:109-114) provide a summary of what teachers have been doing in curriculum planning and design. Yet even the type of organisation is stated for teachers as participative learning. A question that could be asked is: What difficulties have teachers experienced in the process of translating learning area guidelines to classroom lesson with others examples like Maths and Science?

Mathematics comprises the numbers and quantitative methods that are used to describe the world and attempts to exercise control over the world, nature, risk and even life (DoE, 2003:190). Study of Mathematics is intended to develop skills such as reasoning, decision-making and problem

solving, understanding systems and using technology among others (DoE, 2003:190).

The DoE (2003:21) further asserts that Mathematics involves symbols, notations for describing numerical, geometric and graphical relationships. Mathematical concepts build on one another in culturally oriented investigations in their social, political and economic goals contexts.

The basic outcomes that are to be achieved in mathematics are: mastery/ competence in the use of numbers, quantitative operations and relationships of numbers, patterns, functions and algebra, space and shape measurement and data handling. The learner is expected to achieve the outcome and demonstrate competence through using the language of the learning area proficiently and in solving problems that are related to the outcomes in a variety of contexts (DoE, 2003:21-22). These views represent the official perspective and reflect curriculum design of C2005 by curriculum researchers and design teams. The question is with what ease and difficulties instructional leaders have implemented C2005 in Mathematics and other learning areas?

The Mathematics learning area starts from the premise that all learners should have access to a meaningful learner-centred mathematics education that enables learners to acquire skills, knowledge, values and attitudes that are global, competitive and oriented towards lifelong learning.

Furthermore, in a related area of learning, science, the main methods used to achieve the goals of scientific proficiency and competences are; use of the scientific process, application of knowledge, understanding and appreciation of the relationship between science, society and the environment.

Teachers should aim at helping learners to achieve the following demonstrable and recognized outcomes: scientific investigations, constructing science knowledge, and development of conscience to relate science, society and the environment.

Beyond these outcomes at the end of learning, learners would have to demonstrate confident and competent use of the scientific process and procedure to solve problems of real life. Learners would be expected to use science and technology to address life issues of curiosity and advance knowledge of science (DoE, 2003:23).

However, these expectations that learners will achieve outcomes assume on the one hand that teachers themselves are highly competent in meeting the following: competence in inculcating C2005 values such as democracy, human rights and environmental conscience (DoE, 2003:5), methods such as programming, facilitation and reflexivity in teacher's craft (see section 2.11). Yet on the other hand there are very few teachers who are competent in Mathematics and Science in the country (DoE, 2003). These limitations lead one to ask: With what ease and difficulties have instructional leaders collaborated with SAQA, NQF, and Umalusi, clarified and even assessed lessons? Has any substantial training of teachers been undertaken to prepare them thoroughly for assessment in C2005?

3.5.7 **Assessment in C2005**

There has been some work at the provincial level on how assessment will be done under Umalusi (FSDoE, 2003:1). The information about assessment is provided because instructional leaders will have to carry it out. Table 3.5 below presents some of the details of how assessment will be run institutionally in the GET band under Umalusi.

Table 3.5 Indicators that Umalusi will use for assessment in C2005

Description	GET - C2005
Quality Assurance Authority	UMALUSI
Aims	Compulsory education for literacy and citizenship
Type of learner envisaged	Broadminded learner with developed cognitive skills to further education and training and productivity
Type of teacher envisaged	Lifelong learner fulfilling the requirements of Norms and Standards for Teachers. Programme designers, scholars, assessors and subject specialists
Learning Areas	Eight – Language, Maths, natural Sciences, Social Sciences, Art and Culture, Life orientation and Economic and Management Sciences
Type of Assessment	Criterion Referenced Assessment
Time allocated for contact in the academic year	E.g. Language 25% Maths 18% Science 13% Others share 44%
Range of Marks and description	30-39% Not achieved 40-49% Partially Achieved 50-70% Achieved 70% and above, Outstanding Achievement
Continuous Assessment	75% then CTAs 25%
Certificate	GET Certificate

Source: Developed by the researcher from different sources of the Free State DoE (2003).

Learners begin to achieve an outcome when they embark on using knowledge in an interactive way, preparing and performing according to the preparations and conclude an outcome, which is assessed through demonstrated competence (DoE, 2003).

Olivier (1998:39) provides details of preparation through development of a clear view of intended outcome context, and formulating problems and working with other learners interactively to solve them. Hereafter one will continuously evaluate the performance.

Moreover, assessment reminds teachers to evaluate the conditions and the communities within which they are developing C2005 and their accountability to such communities and the SGBs.

3.6 Evaluation of Curriculum Development in C2005

It can be assumed that OBE approach to the development of C2005 in SA is a continuous process hence one can only evaluate limited areas of its implementation. However, because a good plan has in-built evaluation and undertakes such evaluation at every stage, it is fair to point out that OBE has much promise on paper, from policy to practice and employment.

Besides, on some of the technicalities of evaluation such as in the case of whole school evaluation, Waghid (2000:81) writes that evaluation is necessary but he queries the way in which it is done sometimes. Waghid (2000:81) observes that it may not be sustainable and meaningful. The present rating scales concentrate on teacher characteristics, pupils' achievement and observation of teacher performance – which would have teacher deception elements, compliance, halo effect and other limitations.

Evaluation of C2005 would mean looking at how well C2005 has been implemented, quality of implementation and examination of the actual process and the problems overcome. In terms of implementation of government policy of RDP and introduction of OBE and NQF, there has been a measure of success (Coetzee, 2002:8-10; Cross, M. Mkwanazi-Twala, Z. & Klein, G. 1998:132). These structures exist at the moment and what is important is to make them work optimally.

Some of the efficiency can be generated from the 'interface,' which Freeman (1993:20), defines as 'the critical period when a task passes from one person to another', in the course of policy, theory and practical

implementation of C2005 at school level and in the classroom. The relevance of examining interface is that it is at this points that the gap between policy and practice exists. It is also the level at which one asks whether participation of both principals and teachers is not an absolute requirement as these are going to implement the measures?

Another evaluative dimension for C2005 development is evaluating instructional leaders' commitment to curriculum development. Research by Morley and Rassool (1999:11) has shown that if teachers were not convinced by the value of new curriculum and its implementation, they would not defend its development.

On another functional dimension, Carl (1995:119) points out, that evaluation of curriculum and its implementation can be pupil-centred or curriculum centred. When an evaluation is pupil-centred it looks at whether student goals were achieved on the curriculum. When it is curriculum centred the focus is on whether curriculum goals were achieved. Both ways, evaluation fulfils the following functions:

- it determines the success of instruction or the quality of learning outcomes;
- it determines whether grading and advancement are possible;
- it monitors progress; and
- identifies defects in the allocation of time and corrects them.

Besides the evaluation carried out by the Review Committee for C2005 (leading to development of NCS), a couple of reviews have been officially commissioned and in addition there have been a few independent ones. While commissioned reviews have generally been positive and recorded more achievements than shortcomings, even independent reviews have found positive achievements. Among the positive findings is: That OBE can justifiably claim advantages of being a national curriculum in SA, in the

same way that OBE did in Britain, the United States, Canada, New Zealand and Australia, when it was introduced in these countries between 1983 and 1991(Taylor, 1993:272).

Evaluating C2005 development in terms of its technical advancement, the National Department of Education in the exercise of power culture and a hierarchical organisation has trained and deployed external evaluators in schools to 'restore confidence in the education system'. At the time of writing the DoE were to visit all of about 27,000 schools in South Africa to evaluate them on basic functionality, leadership and management, communication, quality of teaching and teacher development, curriculum provision and resources like books. The DoE would also examine learners' achievements, safety and discipline, governance, relationships and infrastructure (Coetzer, 2001:90). This evaluation system is referred to as Whole School Evaluation (WSE). The WSE works alongside Developmental Appraisal Scheme (DAS). Through their labour unions, teachers highlighted the gap between perceptions of evaluation between C2005 designers and implementers when they stopped the DoE evaluation process through a strike action in 2003. Instead they called for a developmental model that would be teacher friendly. The DoE has since worked out the "integrated quality management system".

According to Hartley, Visser, and Shappard (1998:9, 19) another illustration of the gap between what the authorities want in C2005 and the conditions in the schools where teachers have to implement C2005, is that the last comprehensive statistical survey of 1996 estimated the numbers of learners in 1996 in Grades 7-9 to be 196, 227 distributed between grade 7 (60,988), grade 8 (71, 528) and grade 9 (63,711). These numbers were not provided with expanded facilities such as classrooms and other resources that facilitate quality teaching and learning in C2005.

Consequently school education in the Free State is characterised by a large number of small schools, with large numbers of learners, but with poorer facilities than in most provinces (Hartley et al., 1998:8). This distribution pattern of learners is replicated in the 2 administrative districts of Motheo and Thabo Mofutsanyana, which are included as the sample areas for this study and also conformed to the past research results. The results showed the highest recorded population of learners and teachers, with many non qualified and unqualified teachers to deliver C2005.

3.6.1 **Training that teachers need for Curriculum Development**

From the experience of teachers there is a gap between what the DoE want to train teachers to know and what teachers themselves want to know. To confirm the assertion, Edusource (Edusource, 1999:5) records another study that found out that ¼ of the teachers claimed that only inexperience limits their performance negatively in the classroom. However in the same study only ½ of teachers expressed a desire to train in OBE driven C2005 and the new classroom approach of facilitating learning and assessment. The other half of the sample, which was relatively small, wanted didactics training.

The process of training itself was found to be inadequate, as 59% said they only received one day of training, while 29% received two days. Only 29% received training on the premises of their school even though this has been found more successful in terms of transferring newly acquired teaching knowledge for practice. Teachers also felt there was inadequate follow up to training sessions (Edusource, 1999:5). In terms of support, 62% of teachers and 2/3 of principals also reported the absence of professional and provincial department support for their schools when needed.

While the province was undertaking improvement of teacher qualifications at the time of writing, the figures of uncertified teachers were 409 of 6723 in

1999 (6%) of secondary school teachers in the Free State (Edusource, 2000:14). Most of under qualified staff were black South Africans (black is used without political connotations); especially as Free State public secondary school teachers are predominantly black South Africans.

3.6.2 **Evaluation of buildings and logistics**

Besides teachers, school buildings that were found to be unsuitable for effective teaching; were 16.1% of all the schools in the Free State. In actual numbers this was about 458 schools. There were inadequate supplies of stationary equipment, furniture and libraries (88.2% of schools did not have libraries).

Furthermore, many C2005 developments would still face classroom teacher to learner ratios that are still high and almost the same at 1: 34. 71% of the schools did not have administrative offices – thus using limited teaching space for administrative purposes and making the situation of teaching and learning worse (Hartley et al., 1998:14).

Based on the assessment of needs and assuming that classrooms would have a ratio of 34:1 learners to a classroom, the biggest shortage of classroom space was in Motheo and Thabo Mofutsanyana administrative districts with 227 and 360 classrooms needed respectively.

Besides the shortage of classrooms, C2005 design teams have collectively created a gap between the assumed numbers of learners in the classroom and what actually prevails in the schools. There were also 946 principals, out of a total of 2309 principals (or 41%) in all, who were found to be uncertified (unqualified) (Edusource, 1999: 6). However, it is surprising that in the same study, 72% of principals were not so concerned about improving their qualifications but expressed desire to be trained in management, especially financial management and crisis management.

What researchers also noted was that only 1/5 of principals expressed desire to train for OBE driven C2005 (Edusource, 1999:5). It is acknowledged that this picture has changed somewhat as at the completion of the project, May 2007 because of ongoing training. The progress requires a continuing evaluation of classroom conditions.

3.6.3 **Evaluation of Classroom conditions**

How much time was spent on task, truancy and absenteeism levels, contact time, punctuality, school closure and record keeping, were used as some of the evaluation indicators of classroom teaching and curriculum development process. Internal and external communication by school management and leadership were also measured. Learners' work as well as feedback procedure, teacher practices, teacher morale and attitude to school were assessed. Discipline, safety and learning atmosphere were also assessed. The results showed that homework was not checked and some teachers still used 'talk and chalk' method of teaching extensively.

In terms of perceived age of going to school, the gap between the target age and psychological development of children and classroom improvement by 1997, only 67% of learners were appropriately aged. The rest were mostly over aged. Coetzer (2001: 86) views the main difficulty as non-training of teachers' professionalism and accountability. Coetzer proposes that training for the implementation of C2005 should include reading, literacy in language and mathematics. Coetzer (2001: 86) proposes upgrading the quality of books and other teaching aids and their prompt supply. Finally the community context within which implementation takes place plays a role in the success of Curriculum Development.

3.6.4 **Impact of the community in Curriculum Development**

At the time of writing SGBs represented community participation in education at school level. SGBs had been allocated power to determine

policy and the mission of the school, the code of conduct of teachers and learners and the budget (Mda & Mothata, 2000:75). It was the responsibility of SGBs to participate in the formulation of the mission statement of the schools and hold some power over curriculum design and development at the school level. However there was a measure of mismatch between responsibility and capacity of governing bodies in schools. The SGBs in rural areas were reported to be more "alienated" and lacking support matching the support given to SGBs in urban schools.

Moreover, Steyn and Wilkinson (1998:274-276) were of the opinion that the system of SGBs seemed to express distrust of the teacher by the DoE and was authoritarian and undemocratic. These traits are justified by pointing at community participation and the SGBs. Consequently C2005 has rather been centrally controlled. It is also seen by some as suppressive of individual talent and learning by bright children (Lemmer, 1999:121).

Besides, the claim made under C2005 to add opportunities for learners could influence them to think that failure is acceptable while in real life situation failure is punished. This protective approach to life is in stark contrast to the serious emerging challenges such as coping in a democratic multicultural society and preparing to deal with and address the scourge of HIV/AIDS, the latter of which hardly gives any more opportunities to their victims. However the question is; with what ease and difficulties have instructional leaders worked with the community and SGBs including addressing the new challenges of HIV/ AIDS and Multiculturalism in the implementation of C2005?

Recent emerging challenges to Curriculum Development have included the need for all SA schools to include transformation to multiculturalism, accommodation, information and protection of people living with HIV/AIDS SA.

Transformation to deal with these specific challenges has led to asking the question, how far have SA schools and teachers been prepared to deal with the issues? For schools, preparation refers to strategic planning to train teachers and other supporting personnel of the school to be ready to handle people. Such a school has been called a learning school. Visible preparation for such schools includes issues such as the school vision and policies that are intended to develop C2005, but that should also be reviewed on a regular basis.

3.6.5 **Synthesising the challenges in the implementation of C2005**

Some of the limitations of implementing C2005 for teachers are illustrated by Menges and Svinicki (1991:3) who in similar circumstances assert that some of the critical choices that teachers make are: How should they teach? How would they know when learners have been taught? Or that what has been taught has been learnt successfully. The choices require teachers to be aware of learning and teaching theories and practice because formal and informal theories of teaching and learning influence how instructors relate to learners and how they deal with the subject matter (Menges & Svinicki, 1991:3). Yet at moment (the time of writing) OBE theories were new and unfamiliar to teachers.

It is assumed in the OBE driven C2005 that curricula are established units and lessons. While teachers are not versed in OBE at the moment, they are still expected to meet requirements of standards, coherence and sequencing because teachers still have the responsibility of facilitating learning and competence of the learner (Burke, 1995:86-90; Olivier, 1998:44).

3.7 Conclusion

Literature reviewed in this chapter has led to the conclusion that instructional leaders have difficulties with Curriculum Development of C2005 in various areas including definition, philosophy, theory and practice of curriculum development. Instructional leaders have difficulties such as lack of clarity on the OBE approach, integration of values such as democracy, environmental awareness and equity. The study and practice of C2005 has political dimensions of social change that instructional leaders have to understand. However this necessity is in contrasts to the "top down" design, dissemination and implementation and evaluation of C2005 adopted by the DoE. Reviewed literature sources have recorded how the DoE approach to dissemination and implementation of C2005 has alienated teachers and raised questions about the difficulties that instructional leadership may experience because of the approach in different stages of the development of C2005. Literature also records instructional leaders' challenges with the assessment of C2005 in the form of CTAs. The challenges extended to important issues such as multiculturalism and HIV/AIDS that beg to be addressed as seriously in increasing the capacity of personnel to deliver quality in C2005. Finally questions are raised in relation to the numbers of learners in relation to the available resources such as LSMs, classrooms and teacher capacity in the Free State and the challenges that these pose to thee standards and quality of instructional leadership and out comes. Consequently an in-depth review of literature is undertaken in the next chapter to determine the difficulties instructional leaders have with the current quality assurance structures. From this quality assure perspective a search will be made for a framework that could pre-empt and continuously address the difficulties that instructional leaders experience in implementing C2005.

CHAPTER 4

A QUALITY ASSURANCE PERSPECTIVE ON INSTRUCTIONAL LEADERSHIP AND DEVELOPMENT OF C2005

4.1 Introduction

In this chapter, a quality assurance perspective is adopted and literature sources on quality assurance are reviewed to establish the ease and difficulties that instructional leaders experience in implementing quality C2005. Contingently, the aim is to establish whether the current quality assurance structures are addressing instructional leaders' difficulties, consequently to reinforce the structures and develop a more holistic alternative quality assurance framework for a collaborative implementation of C2005. A quality assurance perspective is adopted because it is an established conceptual and technical method of pre-empting problems in the implementation of any programme (Bogue & Saunders, 1992:17; Smallhorne, 2001:35; Thurlow, Bush & Coleman, 2003:139-140).

In justifying research of this nature, Bayne-Jardine and Holly (1994:21), Freeman (1993:36), Lubisi (1999:3) assert that action based on the findings of research could go a long way to address shortcomings in the implementation of education programmes. Hence to review the literature sources systematically subsections will define and clarify how quality and quality assurance are understood. The philosophical and legislative basis of quality assurance will be presented, the context of quality assurance in instructional leadership and curriculum development of C2005.

4.2 Definitions of Quality and quality assurance

4.2.1 **Quality**

Quality in SA is understood and linked to the definition of the concept in the international community and to its origins in business (Van der Westhuizen,

2003:284-288). The most classical commercial definition of quality is that "it is the totality of features and characteristics of a product or service that bear on its ability to satisfy stated or implied needs of the customer" (Parsons, 1994:2). Parsons (1994:2) further calls quality "fitness for purpose" or a product that conforms to the descriptions of the consumer. Parsons shares this understanding with Baijnath at al. (2001:84). Morgan (1992:44) suggests that, "in the 1990s the concept of quality revolutionised organisations including schools and changed their values, their ethos and modus operandi, in almost a similar way that invention of machines revolutionised industries in the 1780s".

Other concepts, that are used synonymously with quality more especially from a managerial perspective describing processes and products that fulfil the requirements of C2005 designers are: excellence, effectiveness and a high standard of management in education (Coetzee, 2002:vi; Fantini, 1986:33; Fourie et al.1995:5; Heneveld & Craig, 1996:xiii-xvii; UNESCO, 1992:2).

In practice, West-Burnham (1992:170) identified the supplier and customer as responsible for defining and initiating the process of quality improvement, in relation to their ability to supply goods and services and meet the needs. West-Burnham (1992:170) further identified the following quality attributes for facilitating measurement of quality in organisations: systems and culture dimensions of quality, principles, perceptions, and practice.

With specific reference to education, West-Burnham (1992:170) refers to intended use, required outcomes, cost, standards, and quantity of educational inputs, processes and outcomes as defining quality. West-Burnham (1992:170) emphasises the responsibility of management in assuring quality and includes Investing in People (IIP) as an externally validated quality assurance system focusing on people. Doherty (1994:11,

15) among others has supported the views of quality as comprising values and attitudes of mind.

The focus on people is also shared by Arcaro (1995:15), who defines quality as expecting the best from all learners across the whole range of abilities. West-Burnham (1992:170) sees quality as a continuous improvement in doing things better, setting standards of achievement, working together collaboratively and taking the long-range view. Furthermore West-Burnham (1992:170) writes that quality means collaboration, participative learning by teachers and learners. Giving learners a central customer's position while recognising that teachers are the sustaining force for quality in the classroom. The nominal emphasis on people and participation is stronger in the SA version of quality as presented by Baijnath et al. (2001:179) and Van der Westhuizen (2003:319-320). However the emphasis causes some contradictions and difficulties for instructional leaders because while government talks of participation, there is little institutional and formalised media for teachers' participation (Coleman et al., 2003:44-45).

Nevertheless, according to Baijnath et al. (2001:179-184) and Coetzee (2002:14), the South African Qualifications Authority (SAQA) understands quality to be a participative process and product of establishing and monitoring standards and qualifications in education and training in SA. The standards and qualifications are then described and presented on the NQF. The NQF has been designed with reference to constitutional, national goals and policies embodied in the vision and mission of SA as principles that guide action.

Baijnath et al. (2001:84, 180) further lend support to the idea of making quality into a "social" goal and go beyond the commercial definition of quality. They conclude that quality in C2005 and the NQF has meaningful parameters because in this case quality is a justifiable strategy that serves a

justifiable transformational education purpose (Baijnath et al. 2001:120,179).

More practically, Coetzee (2002:4) indicates that NQF and parts of C2005 in the SA education system also embody quality indicators such as: integration, learning outcomes, access, mobility and progression, redress and personal as well as national development. However these quality descriptors have many dimensions of quality that Baijnath et al. (2001:84) show in their writing; they describe attributes of quality that are a prerequisite for situational measurement of quality while Townsend (1997:108) proposes a threshold for acceptable standards, norms and criteria for measuring quality.

While government legislation and policies that have been implemented indicate that the official assumptions and practical measures have selected and developed official and hierarchical forms of quality from international and national repertoire, Townsend (1997:107) argues that teachers will always want discussions of quality to be linked to the improvement of teaching and learning in the classroom. It can be inferred from this argument that some quality descriptions leave out the classroom. Consequently teachers have not found them directly helpful.

Parsons (1994:8-9) supports the argument for teachers' professional participation in quality education as a priority because at times in education, the customer does not know all, or more all the time. In such cases a professional may claim to have more knowledge that constitutes quality. Consequently it would be justified to have professional quality assurance. Therefore, Parsons (1994:8-9) proposes three categories of quality: client quality, professional quality and management quality.

Literature that has been examined so far suggests that the official understanding of quality is not fully shared and practiced by instructional leadership at classroom level (Townsend, 1997:107). In support of this view Coetzee (2002:3-4) summarises the official understanding and indicators of quality for the SA education and training as the national expectations, expressed in the objectives and principles of SAQA and NQF, namely, integration, redress, access and quality provision of education. The objectives encapsulate principles of relevance, credibility; standards, legitimacy, articulation and progression among the most important (see section 3.5.2). Elements of the SA Bureau of Standards (SABS) and the International Standards Organisation (ISO 9000) could be added to these indicators to infuse an international dimension to the SA education quality for comparison and competition with other world countries (Bergenden Enterprises, 1994:3-7). A question that arises in regard to the differences in understanding quality is: Does the lack of common understanding quality between officials of the DoE and teachers not contribute to the difficulty of implementing C2005? What follows is a short examination of the definition of quality assurance, theory and systems that are currently in operation for C2005, problems and suggested alternatives.

4.2.2 **Quality Assurance**

From a more industry oriented perspective, Parsons (1994:ix) defines Quality Assurance as “a process which sees that all the planned and systematic actions necessary to provide adequate confidence that a product or service will satisfy given requirements for quality are taken”. Parsons (1994:ix) sees quality assurance as a management system intended to give assurance that goods/services that are delivered to the customer are of highest stipulated standard.

Specifically focused on education, Freeman (1993:10, 36) defines quality assurance as “a systematic approach to identifying market needs and

honing working methods to meet these needs". Freeman (1993:10, 36) adds that in education the market includes parents, learners, employers and government agencies.

Theoretically, Freeman and Parsons give two definitions that summarise literature on quality assurance. They present two strands of quality assurance. One strand is from manufacturing and industrial holdings, the other is a derivative from industry that is adapted to education processes (Sallis, 1993:1; Townsend, 1997:113).

Furthermore, research that has accumulated on quality assurance in education suggests that most definitions and theory on quality assurance are built upon those of Total Quality Management (TQM) (Bradley, 1993:12; Freeman 1993:10-13). TQM has subsequently been modified into Total Quality Education (TQE) so that it can be applied to the education process (English & Hill, 1994; Sagor & Barnett, 1994). While TQM theories have provided lessons of quality obtained from industry to education, such theories do not sufficiently deal with values of education, because educational values are indivisible and qualitative in nature (Parsons, 1994:6-7). Education deals with psychosocial values like perception and knowledge that are only quantifiable in some respect and cannot easily be measured in precise quantitative figures.

Notwithstanding the noted differences between industry and education, there has been convergence in the use of quality assurance systems based on standards such as the British Standard (BS5750) and International Standards Organisation 9000 (1S0 9000), in their totality to inform newly designed quality assurance systems (Freeman, 1993:10-14; Parsons 1994:3-9; Sallis 1993:1-2). Van der Westhuizen (2003:314) indicates that the South African Bureau of Standards (SABS) has adopted the ISO 9000 in its totality. These systems have commonly adopted the concept TQM to

mean; “continuously meeting agreed customer requirements at the lowest cost, by releasing the potential of all employees.”

However on the construct of meeting the customer’s needs, Parsons (1994:8-9) (4.2) argues that it is common in education to find that the customer does not know….consequently it would be justified in such cases that professional quality assurance prevails upon what the customer thinks.

Notwithstanding these views on quality assurance, Matric examinations results were regarded as the main quality assurance indicators at school level in SA before 2000 (GCIS, 2005:199). This information answers the research concern of whether there was quality assurance when C2005 was implemented in 1998.

Contingent to this answer, it can be deduced that Matric could not address the difficulties that instructional leaders experienced. However outside Matric, the SAQA and NQF offered marginal quality assurance before 2000 (Van der Horst &McDonald, 1997:70). The fact that these structures do not work directly with instructional leaders suggests that those instructional leaders would find macro, meso and micro level quality assurance bodies that were established in SA after 2000 new.

4.3 TQM as a quality assurance perspective

In order to be meaningful, quality assurance has to take learners’ understanding and styles of learning into account. In this regard expectations on learners are the same in C2005, TQM and the Developmental System of Education (DSE). It is claimed that in these systems learners will assume more responsibility for their learning, ideally reducing the difficulties of teachers. Curriculum is restructured to emphasise quality and organisational goals that are redesigned to focus on quality. In the DSE system quality teams are formed to involve learners,

staff, parents and community in decision – marking and assessments are made to achieve continuous improvement (Arcaro, 1995:3-4). Theoretically this system works like the Japanese tradition of Kaizen, step-by-step incremental progress.

Arcaro (1995:16) proposes a blend of quality assurance of curriculum that is a combination of TQM strategies of training systems analysis of Peter Senge, principle centered approach of Stephen Covey and techniques of critical skills that are given below in combination with those of Deming. Arcaro (1995:16) sees Deming's (1986) strategies of success in co-operation generating further success as one of the qualities, which blend OBE and TQM.

TQM as a philosophy, theory and mode of organisation for improvement of performance can solve problems of classroom services of learning and teaching even though educational ends, culture, language and problems of the classroom are different from those of industry for which TQM was designed (Arcaro, 1995:19). Adoption of TQM perspective and thinking is a change of one culture of teaching and learning, to another.

To its credit, TQM would help to bring the constitutional aspiration of accessing quality education to all South Africans as a right to reality (RSA, 1996). SAQA and the NQF work to achieve this goal of access. TQM would transcend and link the efforts of all the DoE, the FSDoE and the schools with a quality culture to actually achieve the C2005 goal of enabling learners to acquire knowledge, skill, attitude and values through critical and developmental outcomes (FSDoE, 2003:1). While teachers would be included in the promotion of the culture of quality of TQM, they would still have to be trained well in TQM systems and the place of the learner as a customer at school level.

4.4 Macro level Quality Assurance

Yet, to show the concern for quality and quality assurance even in earlier writing, Pretorius and Lemmer (1998:viii) state that quality education is one of the main reasons why recent education reforms were undertaken in some developing countries like Bangladesh, Pakistan, Egypt and Malawi. Educational reforms in these countries, just as in SA, have been guided by the desire on the one hand to have a competitive edge economically over other countries and on the other hand, to have stronger bases for cooperation and gaining a share of common benefits.

In practice most current macro level quality assurance activities, represent a shift of emphasis, from mere detection of nonconformance to specifications (quality control), to prevention of non-conformance of outcomes. Other activities are: definition of quality policy and expected outcomes, development of a quality manual, ensuring competence of personnel, conducting periodic audits, elimination of root causes of the problems found, periodic review of the system by top management (Smallhorne, 2001: 35). If they were adhered to, these elaborate practices would strongly support instructional leadership in C2005.

Moreover Griesel (2002: 2) compared quality assurance systems and perspectives from many countries and concluded that the main areas of similarities in the systems are: notions of quality, purpose, procedures and context and most systems also strive for transparency, validation, accountability and improvement.

In order to have comparability in thought and practice of quality assurance with the world especially at macro level (Van der Westhuizen, 2003:314), South Africa has to incorporate international perspective of quality assurance, such as those of the ISO 9000. While the ISO 9000 presents an existing framework and a point of reference on quality assurance for

teachers, teachers would have to understand its industrial origins, its use in the education discipline and integration into the SA context as the South African Bureau of Standards (SABS) and its influence on policy.

4.5 National Policy basis of quality assurance in SA

Many definitions of policy derive from politics. For example, Easton (in Ball, 1983:12) defined policy as "authoritative allocation of values in social groups". This definition is important but concentrates on politics alone (Taylor et al., 1997:27). Smith and Foster (2002:76) give a broader definition of policy as a statement of government intention. The intention is often given effect through laws defining how the society should evolve.

Hogwood and Gaun (in Taylor et al., 1997:23) further relate government policy intention to the form in which planned action is presented. The writers derive a synthesis meaning of policy that applies to education as "a complete, explicit choice of approaching a problem, conflict or issue of concern". They further, assert that "policy is a purposeful course of action that is undertaken to achieve a particular objective" (Taylor et al, 1997:24).

Taylor et al. (1997:14) emphasise the political, economic and social context of policy making, but above all, policy making is a state activity. However, policies themselves are shaped by interaction of the state, civil society and the economy. At the school level (part of the civil society), the principal's role is very central to policy development and helping teachers to also understand the process.

Taylor et al. (1997:14) present three stages to policy development. They are: formulation, problem statement/articulation, implementation and review of outcomes in mobilisation of government action. This is where quality assurance policy fits in.

At the moment the South African education governance operates at four levels: central (National), regional (Provincial) and district levels and local /school/centre of teaching level. Quality Assurance in SA is intended to help the achievement of many desirable aims as stated in the vision statement for C2005 and the constitution of the Republic of SA (1996).

However, Letuka (2000:112) highlights the difficulty in translating policy prescriptions to practice and observes that, "the task of developing and establishing any quality assurance system from policy to practice, as required by the South African Education and Training policy documents, is very complex and difficult to realise". It can be inferred that involving teachers with their limited technical capacity in the process of translating policy to practice aggravates the complexity of the process. From a problem solving perspective the complexity suggests that there is a need for a specific perspective or framework which functions like quality assurance to preempt difficulties in education. Such pre-emptive action would be in line with the expressed desirable levels of quality that schools should provide according to the white paper on education (DoE, 1995:28; DoE, 1996). The details of responsibility and accountability for financing quality are discussed in the next section.

4.6 Quality assurance versus moderation in C2005

Whole School Evaluation (WSE) that is discussed further in section 4.10.3 is one system that comes to mind in this regard, that functions more as a monitoring agency. This system was first articulated in the quality assurance policy in 2000 (Van der Westhuizen, 2003:319). Indeed along with WSE was a proliferation of quality assurance structures established in SA from 2001 with the hope that they would assure quality curriculum development and guarantee high standards in the education and training processes from macro (national) to micro (school) level.

A further example of one such education initiative at the macro level is the Directorate of education (DoE, 2002:7). The Directorate is responsible for quality assurance at school level and adheres to the principles of collaboration and quality assurance in its work. The principles determine policy design, dissemination, implementation, review, provision of resources for schools to function, leadership, management and communication, governance and relationships. The principles also determine culture of teaching and learning, teacher development, curriculum provision and resources, learner achievement, school safety and discipline, school infrastructure, parents and community participation. Quality Assurance looks at the principles as a form of moderation to see whether they have been followed and their targets achieved.

Moderation means that there will be a body that will be external to schools and charged with responsibility of verifying that quality is being assured, or that the school has done its own evaluation of its programmes according to OBE driven C2005 standards (Vandeyar & Killen, 2003:125-128). For example, the final certificate of General Education and Training obtainable on completion of grade 9 will be a whole qualification so there will be moderation sessions that Umalusi will undertake under the DoE. Outside bodies as well as other inspection and evaluation bodies such as the WSE would represent an external evaluation management process (Coleman et al., 2003:149-164; DoE, 2003).

According to Coleman et al (2003:50) moderation comes in the forms of audits and inspection and is part of planning in the drive to improve performance of schools. Moderation forms part of evaluation of effectiveness and achievement of goals that an organization could set itself.

The processes of evaluation and monitoring serve the purposes of quality assurance and accountability as they are intended to establish that the goals that an institution set are achieved and that there are measurable indicators that could be pointed out to support claims of achievement or failure (Coleman et al., 2003:150).

Freeman (1994:26) indicates that even if a school has an internal quality policy there is no guarantee that the procedures for achievement of quality results would be followed, or the results achieved. Audits therefore ensure that procedure is being followed. Freeman (1994:26) cautions those who audit, that the difficulty for instructional leaders is, that the audit process is usually threatening. He advises the management to assure teachers that what is being audited is the process and not people.

However, Freeman (1994:126) indicated that audits are undertaken to identify and correct noncompliance of people with organisational procedure. The content of audits varies depending on what will be covered. An audit can cover a single process or many. It can also use qualitative or quantitative measurements. It has to have precise dates and people responsible for auditing. In a cyclical manner an audit starts, identifies or confirms compliance and either leads to corrective measures or just close confirms compliance with procedures.

While quality assurance in C2005 could be initiated internally through self-assessment by schools, because of the tendency in SA to drive education policy through “top down” approach, there will be a need to have external moderation as a preserve of the national level policy responsibility. Coleman et al (2003:154) speculate that in SA, those who discharge the function of monitoring are likely to continue preferring the quantitative approach even though the better, more appropriate method is qualitative moderation, which even goes a long way to involve instructional leaders. At

the time of writing the DoE was working on what is called Integrated Quality Assurance Management System (IQMS), which has already been implemented at school level alongside moderation through the Whole School Evaluation. One important issue that should be considered carefully is this regard is the financial requirements of quality assurance.

4.7 The financial requirements of quality assurance

The Constitution of the Republic of South Africa (1996:26-28) stipulates that government and other national, international and non Government Organisations will finance this level (compulsory education level) of education. This is to further access education to most learners as one quality descriptor.

Furthermore the constitution's stipulation of the right of all South Africans to education has led the government to establish the Review Committee in school organisation and government funding that has worked out how to equitably share government funding of schools based on their needs.

The DoE (1995:58) has also committed the government to giving "ten years" free and compulsory general education as central to the national development strategy. The implementation of government commitment is based on two sets of principles. It has a set of broad policy principles and a set of compatible but more operational principles, which underpin the implementation strategy. The broad policy principles that define quality education have been stated in the preceding section 4.2.1.

Notwithstanding these positive intentions of policies, instructional leaders experience difficulties because there is a shortage of good textbooks and other instructional materials as Beets and LeGrange (2005:1900) and others narrate in section 1.1. Schools do not provide a decent environment for learning. Many schools are in a state of disrepair, with no furniture, storage

space, electricity, safe water supply, toilets, school library, laboratories, workshops and recreational facilities. From a quality assurance perspective the limitations raise the question: with what ease and difficulties are instructional leaders trying to deliver quality C2005 in the circumstances? Are existing quality assurance structures helping instructional leaders? What quality assurance framework could the stakeholders suggest at school level to reinforce the existing quality assurance structures to pre-empt and solve identified problems?

On the positive side, SAQA, the NQF, the SGB, NSBs and the IQMS have been legislated to promote quality assurance for school level since 2001. Quality assurances structures that are closest to the schools and that are operating within schools are the IQMS and its agencies, the WSE, DAS and PEMS. These structures also offer a framework for teachers to develop quality assurance. Yet it is relevant to ask; with what ease and difficulty have teachers sought to understand and implement these structures to assure quality in their design of programmes in class?

4.8 Quality assurance at school level in South Africa

Heyns (2000:160) brings quality, school effectiveness and excellence together in his research and asserts that quality education is largely dependent on school effectiveness. He indicates that it is in promoting achievement of quality educational process and product (that can be measured with the indicators given by Education for All in a point form in section 4.6), that principals and teachers could assure quality delivery in C2005. They could do this by adopting short and long-term strategies to link definition and pursuit of quality outcomes to the classroom.

At the moment there are parallel Education and Training Quality Assurance Bodies (ETQAs) in South Africa whose history and formation could be traced to 1994 when the SA education system was restructured and unified

(DoE, 1997:9; DoE, 2000:10-11). Section 1.3.2 of this study explains that formal quality assurance bodies that focused on teachers in SA were established in 2001. Their analysis and details will be given later in this chapter. At this point it is noted that regarding SA, as Baijnath et al. (2001:179-198) show in an indepth study of quality of distance education, quality assurance is a process that is promoted from the official perspective by the South African Qualification Authority (SAQA) and the National Qualification Framework (NQF) continuously through standard setting and accreditation framework (or moderation).

While the WSE is one of the prescribed quality assurance bodies established in 2002 to improve teaching and learning, its methods of visiting schools, akin to inspections of the past lead one to ask, to what extent has WSE been addressing the difficulties of teachers at school level? Indeed even with the IQMS the question is still relevant, as the WSE is part of IQMS. The next section attempts to establish who the other role players are, and what opportunity there is for them to help instructional leaders.

4.9 Stakeholders and indicators of quality assurance in C2005

4.9.1 **Stakeholders**

If quality assurance in education is analysed from macro, meso and micro levels, the main stakeholders are customers, learners, parents and the community. After these are teachers and finally senior managers (Van der Westhuizen, 2003:297). In the case of C2005 it is logical that parents would be interested that quality and quality assurance are defined to include learners passing through the SA education system with a recognised certificate that could be used to find a good and paying job. This is the basis of accountability in the system and teachers are part of it.

The government would be interested in learning that schools will produce good citizens who will have skills and knowledge to fit into and drive the

socio economic and political policies as well as offering different needed services to private individuals and the public (Van der Westhuizen, 2003:296-297). It could be inferred from literature that actual requirements and occupational interests determined each stakeholder's perspective.

Most organisations adopt excellence as a perspective determining the processes that fulfil conditions for the achievement of quality. Freeman (1993: 15) for example writes that, "Quality Assurance is an approach to organisation (by management) which ensures that:

- the organisation's mission and aims are clear and known to all;
- the systems through which work is done are well thought out, foolproof and communicated to everyone;
- it is always clear who will discharge which function;
- what the organisation regards as quality is well defined and documented;
- there are systems to check that everything is working to plan; and
- When things go wrong (as they would) there are agreed ways of putting them right".

From a different perspective, Freeman (1993:19-22) puts emphasis on two functions, the agreement on the mission and interface. The term mission refers to long-term goals while interface refers to efficient handing over of functions/duties by staff to one another**.** While the functions given by Freeman (1993:19-22) are characteristic of manufacturing industries, Squelch and Lemmer (1994:viii, 13) give very similar characteristics and indicators for an effective school that assures quality curriculum delivery in SA, viz.

- good leadership that essentially sets high expectations, motivates staff, establishes a positive learning environment and monitors learners' progress;
- clear goals that are known and shared by staff;
- a positive discipline policy;

- leadership and teachers who work collegially as a team;
- involving parents in education of children;
- appraising staff to identify professional and manpower development needs and satisfy them; and
- leadership that manages conflict, stress, provides a safe environment for work and solves problems.

Besides literature on quality assurance based on the tenets of business, the ANC and the NDoE (Mail & Guardian, 18. 2. 2005:1) are pursuing “Quality Education for All,” in conjunction with other countries in the world, and they give the following indicators for achievement of quality education at school level:

- building capacity of teachers and school managers;
- achieving desired learning outcomes through improved teaching and learning methods;
- improving learner achievement;
- improving youth and adult literacy;
- rehabilitating school infrastructure;
- improving access to teaching and learning materials;
- improving access to media and other means of communication;
- fostering community integration and involvement in the life of the school;
- developing effective means of monitoring and evaluating systems and mechanisms;
- changing attitudes towards implementation of new policies; Improving accessibility to school and supervisory support; and
- confronting the Human Immuno-deficiency Virus (HIV) and Acquired Immuno-deficiency Syndrome (AIDS) pandemic (Ministry of Education, 2000:xiv- xv).

4.9.2 **Indicators of quality assurance**

Townsend (1997:64-5) with a team of quality evaluators carried out a research on schools to determine which schools assured quality curriculum delivery and gave the following qualities as indicators of quality in a school:

- a school gives learners knowledge, skills, attitudes that would enable them to cope in the complex world of today and tomorrow;
- a school is concerned to promote values of excellence and high standards of individual and institutional aspirations, achievement, good conduct in all aspects of its activities;
- schools should be democratic, equitable and just;
- schools of quality should humanise teachers and give them an introduction to values that will sustain them in the societal and personal development;
- quality schools should develop independence, self and human worth, confidence in the ability to contribute to the society in appropriate political, moral and social ways;
- quality schools should teach citizenship;
- the schools should help learners be prepared for cultural association and adaptation; and
- schools should cultivate a sense of personal autonomy, enterprise and humility.

A synthesis list drawn from these indicators would include context, input, process, and output factors as presented in table 4.1.

Table 4.1 Desirable quality outcomes and their indicators

Quality Indicators	Quality Outcomes
Context	Clear and competent DoE structures, functioning collaboratively and knowledgeably to impart policy and guidelines in schools.
Inputs	Highly capable leadership with a SA philosophy, vision, mission, a sound theory and human resources capacity to achieve high quality educational outcomes
Process	Clear institutional, cultural allocation of roles and duties performed to very high standards.
Outputs	Problem solving systems that monitor and correct all quality curriculum limitations at all stages; design, dissemination, implementation and evaluation.

While the indicators have only become obvious after the establishment of quality assurance structures in 2001, they are prescriptive and facilitate measurement of outcomes from official C2005 policy intentions and guidelines in the SA context (DoE, 1997:8). It is of interest in this research to know the ease and difficulties with which instructional leaders have been applying these quality indicators in the implementation of C2005.

Nevertheless, it is technically practical to assure quality in the implementation of C2005 at grades 7 to 9, up to the time of writing this research report. This is because quality assurance of the learning process and assessment of grade 9 has been assumed to fall under the South African Certification Council (SAFCERT) whose duties were transferred to Umalusi from 2002 (DoE, 2002), the examining body of the FET (Matric) level of school education. At the time of writing the report, the DoE was planning to conduct assessment in grade 9 through Common Tasks of Assessment (CTAs) and Continuous Assessment (DoE, 2000:2). Similarly it could be expected that principals and teachers see grade 9 level results as predictive of the level and quality of performance that would be expected from the graduates of grade 9 going into Further Education and Training Certificate course.

It could be assumed that the indicators include the critical and developmental outcomes of OBE driven C2005 in their implementation. In such a form the quality indicators would conforms to those that have been observed in other countries that implemented outcomes based education (Townsend, 1997:64-5). In regard to instructional leaders, even though they are one of the inputs in this quality and education process, in order for them to fit in well in the process (assure quality), a relevant question to ask is whether they understand that the framework and categories of indicators in the education system include, context, inputs, process and outputs as the DoE claims (DoE: 2005:3).

4.10 The process of implementing quality assurance

Section 4.3.1 posits that Matric examinations were regarded as the main quality assurance tool at school level before the year 2000. However from 1995, SAQA and later NQF were created. Yet these structures were more about monitoring and accrediting than solving instructional leaders' difficulties. From 2001 onwards several bodies, such as the IQMS and WSE, DAS and PEMS were created. These quality assurance structures were implemented hurriedly. Furthermore, the structures and the systems that have been formed recently involve more accreditation and monitoring quality assurance than improvement of instructional leadership (Coetzee, 2002:143-22). These features of quality assurance raise a pertinent question: With what ease and difficulties have instructional leaders kept in step and implemented the government planed changes and quality assurance systems that are intended to assure quality and moderate learning in C2005?

4.10.1 **Quality assurance perspective on instructional leadership**

RNCS (now NCS) curriculum guidelines require teachers to design their programmes from outcomes of significance as is the tradition in OBE.

However it is also important to know what quality assurance measures are at teachers' disposal to assist them in their design of programmes for the classroom.

Teachers have tended to accept external professional colleagues more as instructional leaders assuming that they know what/how quality can be achieved. The most sensible evaluation is programmatic evaluation. Visiting teams/committees for example could encourage whole school evaluation starting with self-evaluation. Visiting fellow professionals examine how well sections are doing and how to improve (Fourie et al., 1999:69). Professionals feel a stronger bond with their profession more than the organisation they work for. This shared sense of professionalism would also lead teachers try and show that they are familiar with factors that are critical to quality assurance and implementation of C2005 and how to evaluate them.

4.10.2 **Instructional leaders' participation in quality assurance**

Section 3.3.1 has revealed that instructional leaders have to deal with and may find difficulty, in adopting constructivist methods of quality assurance in OBE that underlies C2005. The research has also demonstrated that the tried and tested TQM system is available, the issue then becomes whether instructional leaders can fully understand it. Furthermore they have to contend with a new constructivist approach to teaching that gives learners an opportunity for initiative. Finally instructional leaders have to be able to handle learners adopting different learning styles and taking initiative in class. The other important stakeholders who have influence on quality assurance in the performance of learners are parents and the community.

4.10.3 **Implementing the WSE**

From the government perspective, C2005 has been disseminated through task teams and Research, Development and Diffusion (RDD) model (see

3.5.4). The model has been developed from bureaucracy. In a research conducted among district officials of the DoE, principals, teachers on the extent of training and preparedness to implement C2005 and Whole School Evaluation (WSE*)* in the Eastern Cape province, Dayile (2004:67-76) reported several important issues, some of which are limitations that could still jeopardize not only WSE but implementation of C2005 as well. He reported that the provincial authorities have given some workshops on the WSE even though such workshops have had limited results.

The research confirmed that teachers recorded the South African Democratic Teachers' Union as one of the main sources of information on the WSE, even though there was no indication of what content the information had. The research revealed that the provincial DoE did the main training where there had been some training. The research also recorded that the majority of teachers are aware of the WSE system.

On the negative side, Dayile's (2004:67-76) research recorded inadequacy in the organisation and provision of quality content in the knowledge to be disseminated about WSE from the DoE offices. There was little co ordination, accountability and a discrepancy between the policy information and claims about achieved results of dissemination made by the DoE on the one hand, and the divergent responses of principals and teachers on the other hand. The details of the discrepancies are that while the DoE claimed that principals had been trained in national policy on WSE, eight of thirty principals responded that they had not received any training. 12 out of 30 principals had not even read the policy. The lack of training meant that schools were not ready for implementation while the DoE thought they were. 25 out of 30 principals did not know what was expected of them in the policy on WSE. The external process of evaluation was not welcome. A small number of teachers had been trained. There is no evidence that

implementation of WSE has demonstrated a resounding success. Hence the need to examine other systems such as the TQM for schools.

4.11 Quality assurance perspective on curriculum development

Writing in 1994, Murgatroyd and Morgan (1994:47) asserted that quality assurance is practiced in many different ways. According to Murgatroyd and Morgan (1994:46) one of the ways of assuring quality is taking all necessary measures to see that production takes place to the specifications of customers. Such preparation in education even takes account of learners as important customers. This section reviews quality assurance measures and their application to establish where they have helped or could help instructional leaders deal with learners and curriculum development, and where the measures may have contributed to instructional leaders' difficulties.

Literature reviewed in the preceding sections looked at how inputs and context have impacted on quality and quality assurance, how and whether these quality assurance indicators have been helpful to the instructional leaders and their difficulties at any point. In this section focus will be shifted to the process of curriculum development to see if there were any measures to ensure that this process was completed to high quality and standard. The section looks at quality assurance in the design, implementation and evaluation of curriculum at school level. In government service similar and overlapping concepts have been used, these are: context, inputs, process, and interchangeably outputs/outcomes. The functions have been examined to find out whether such quality assurance has addressed teachers' difficulties in the development of C2005 and whether instructional leaders have also implemented C2005 guidelines to a high quality level.

4.11.1 **Quality assurance and learners**

Among current educational problems related to the disadvantages of the past are research findings that graduates of the senior certificate level that enter university are finding it hard to cope with the demands of university work. Some of the learners perceive the passage to university as a big jump (Samkin, 1996:117).

Employers, who are the third group of stakeholders in education, after parents and teachers, are also very worried and complain of the poor quality of the new graduates. Therefore, it is necessary to give them some assurance that quality will be delivered even from the lower level of the GET band.

Besides systemic definition of quality of C2005, there are principles that have to be fulfilled to achieve quality in the way in which it is understood in SA (see section 4.2, 4.3). Then there are input and process issues of infrastructure, organisation of work, of human resources and training, and practical engagement of teachers on the ground, or in the frontline in schools.

By 2003 Bot (2003:10-16) records, that the DoE had reviewed the quality of education provision among public schools, financing, resources procurement and meeting costs of education, and had published a plan of action which included the following measures that were put into place in 2003/4 to improve efficiency and outcomes of education for public schools:

- research and design of strategies for educational human resources procurement;
- improvement of in service training programmes for teachers;
- improvement of school management and giving incentives for vital factors; that could enhance teacher productivity; and

- research into SA teacher identity and the factors that could help in formulating workable solutions to the problems of strategies.

Unfortunately at the time of writing the result had not fully been established and recorded in literature.

4.11.2 **Learners and training**

Besides these research oriented measures that are applied in the context of schools and their learners, the government would continue to roll out training programmes to help teachers develop generic skills and knowledge pertinent to their tasks to cope with implementation of C2005. The government will strengthen the nation building component of advocacy and training programmes. The DoE would pay attention to planning that will ensure retention of quality teachers, their training, remuneration and further support with Learning Support Materials (LSM) by 2004 (Bot, 2003:12).

Furthermore, in terms of resource inputs that would influence quality, the government had set the deadline of 2005 for providing all schools with electricity and water meters that the schools themselves can regulate. Schools would also be supported to feed the needy children on a pro-poor basis in all schools. The government also aimed to start a fund in poor schools to pay for children whose parents are too poor to afford the fees and to feed them at school (Bot, 2003:12) at the GET level.

These material conditions have an impact on quality in township and rural schools. It is reasonable that government wants to address them to level the field for quality assurance. Yet a pertinent question that could be asked is; with what ease and difficulties would quality assurance address the concerns of the two different groups in the same way?

Vermunt (1998:150) highlights the importance of research on improvement of learners' cognition and metacognition processes for constructing

knowledge and indicates that such improvement would also require a change of instruction to constructivism. In Table 4.2 two instructional theories are compared to show the advantages of cunstructivism.

Table 4.2 A comparison of traditional and constructivist instructional design approaches

Traditional instruction	**Vs**	**Constructivist (instructional design theory)**
-Is based on teaching as a process of transfer of knowledge and student learning activities are directed from outside.		-Teaching is a facilitating process of active construction of knowledge by learners. –It relies on theory/generalisations, applications.
-Passive, knowledge consumption.		- Problem-solving.
-Memory and reference.		-All instructional design is based on theory.
-Technocratist learning.		- Personal presentations of learners change the meanings of experience.
-Deep approach to learning.		

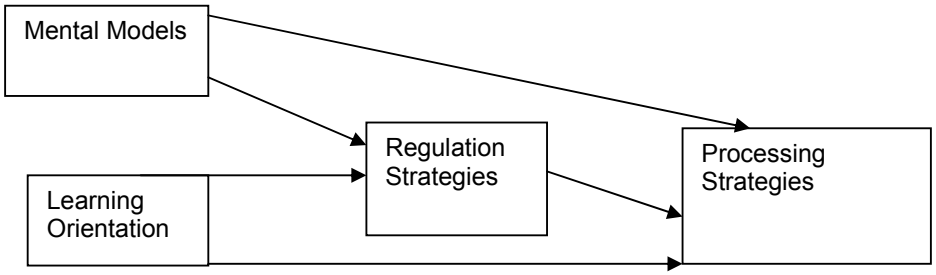
(Vermunt, 1998:150)

Vermunt (1998:150) proposes that the fundamental issue in promoting enough quality learning is moving more to constructionist theory of curriculum and learning program design. This is what C2005 in the modified form is pursuing (FSDoE, 2004:18-45).

Vermunt's research (1998) follows in the conclusions of Entwistle (1988); and Morgan and Taylor (1984) both of whom had discerned four (4) learning styles: cognitive, metacognitive, mental models and orientation styles.

Vermunt's (1998) phenomenographic studies were confirmed in the report of the article - *Gaining understanding of regulation of learning phenomena*. The model proposes that mental models and orientation determine learners learning – processing of subject matter – mental models also influence processing of strategies indirectly through strategy regulation. The phenomena can be generalised across age/types of learning institutions and learning styles stabilise over time.

Figure 4.1 A mental model of the learning process



(Vermunt, 1998:153)

Vermunt (1998:155), in an inventory of learning styles (ILS) from phenomenographic analysis descriptions and categories composed a diagnostic instrument. Construction of the self-regulation model is directly related to an important degree to self-regulatory strategies (Vermunt, 1998:48). Implications of the study were that systematic transfer of control over the learning process, from teacher to student, could achieve constructive high-quality learning activities.

The process of learners' learning should be more in focus to achieve the process-product oriented teaching. According to Goswami (2004:1-4) in order to achieve critical learning, concrete – processing strategies are needed. Changing mental models can also help replace memorisation with direct interaction and analytical strategies.

More recent brain research studies offer more understanding of the learning process and the possibility of designing more informed theories of learning (Goswami, 2004:1-4; Sorgan, 2001). However these envisaged theories of learning to be of importance in the quality management of learning they will have to be built on established systems such as the TQM.

4.12 The critical factors in the assessment of quality

To highlight the critical factors for curriculum development, the DoE embarked on establishing quality assurance and training, to address the shortcomings in the implementation of C2005 and to maintain excellence in

the SA education by legislation. However, Fourie, Strydom and Stetar (1999:7) indicate that “too little attention has been paid to close up ground level approaches which reveal the views, perspectives and activities of the frontline” participants in quality assurance. This statement underscores the point of a gap between the officers of the DoE and the instructional leadership on what is critical for the success of C2005 implementation.

Furthermore the DoE commissioned a research to look into how to address another issue of quality; access to free and quality basic education for all by making education provision in public schools efficient (Bot, 2003:1). The research led to the development and piloting of manuals to evaluate and monitor the performance of the SA education system as a measure of quality assurance in C2005.

The consortium included; Edusource, Centre for Education Policy Development, Management and Evaluation, Human Sciences Research Council, Education Policy Unit of the University of Fort Hare. The consortium recommended the following four indicators of quality: context, inputs, process and outcomes.

In this framework the context includes the socio economic background of the sample and the support that it gives to learners (Bot, 1999:2). According to Heneveld and Craig (1996:16) inputs include the education system, material support and facilities that determine an effective or quality school. Process includes leadership, good learning climate as well as actual learning and teaching and the time spent on task by learners and assessment of the work. Outputs include outcomes in learners who graduate with knowledge and good performance. The ultimate output seems to be maturity and expertise of the learner that enables them to improve their lives and contribute to national development.

Bot (2003:1-16) records that the research recommendations from the DoE review of teachers, personnel and other resources for public schools were used by the DoE to draw a plan of action realised in 2004. The plan of the DoE is to continue trying to enhance equity through provisioning of personnel and finance school infrastructure. The plan however acknowledges that past strategic initiatives on quality assurance have had limited success and that it is necessary to have a more in-depth research on strategy for human resources and in service training (Bot, 2003:10).

In reference to outcomes, achievement is expected at a high level of competence and is assessed authentically. There is no time limit to the acquisition of knowledge as learners self-pace. Most assessment is undertaken to identify problems and solve them. Botha and Hite (2000:133) write that they examined the work of Gabor (1998) on authentic assessment and conclude that the term authentic assessment is not fully and universally understood, they argue that it has to be pursued and be defined in a universally accepted manner. All these are difficulties that will affect instructional leaders' work.

The search for the most viable quality assurance system has included looking at TQM and its main architect, Deming, who defined quality in terms of a method that is informed by theory in 1986 (i.e. quality assurance as satisfaction of the customer). However, Botha and Hite (2000:135) claim that Deming was not impressed with implementation of TQM in education because there are no immediate measurable outcomes.

However, Botha and Hite (2000:138) also indicate that there is some agreement between TQM and OBE. The two have potential benefits of improving the quality of procedure and content in the school as an organisation – especially through the integral alignment of inputs, processes and outputs of collegiality, participation and repeated success.

Botha and Hite (2000:139) write that achieving a SA appropriate OBE will need vision, courage and fortitude. OBE and hence C2005 could contain more collaboration as well as theory and practice when they are driven by vision – and systematic cooperation among themselves. The surprise inclusion of a measure of autocracy is intended to safeguard standards because it is suspected that standards could go down with the changes. It can be inferred then that teachers need to be good visionaries, and knowledgeable collaborators to work in a system like that.

While instructional leaders are trusted with quality assurance at school, Pithers (2000:240) observes that sometimes some teachers simply agree or disagree in their teaching, or just demonstrate and explain. This method of teaching cuts off learners' responses, it uses reproof rather than praise and shakes learners' confidence in the value of new ideas. Basically the method uses only retrieval or recall type of questions within thinking. These limitations have made it necessary to search for an effective quality assurance system. The question is whether the WSE is such a system.

4.13 Evaluation of school level quality assurance

Evaluation of quality and quality assurance can be undertaken in the following areas of curriculum implementation: -

- Governance, effectiveness of governance and management of the school – depending on why quality assurance was introduced.
- Major mode of teaching in C2005 (it is clear that there are many modes).
- Balance of practical and theoretical general and specialist teaching.
- The impact of research on teaching and the involvement of learners in research.
- Whether the curriculum has clear goals in terms of the knowledge and skills that learners must acquire.

- Workload appropriateness to allow active rather than passive learning.
- On exams only memory test or test of ability to integrate knowledge.
- Inter/across discipline work by learners.

There could be an evaluation of the nature of curriculum and its management. Then there could be an evaluation of institutions. For example a SWOT (strengths, weaknesses, opportunities and threats) analysis could be carried out. Baijnath et al. (2001:92) point out that accreditation and quality assurance are different. Accreditation is for choosing and opening institutions while quality assurance is for their improvement. Their difference, however, opens the possibility that the former can be managed by the government to maintain minimum standards while the latter could be managed by educational institutions to enhance quality.

Nevertheless, Kotecha and Luckett (2000:204) state that any national quality system is constrained to work within policy frameworks that SAQA and the Department of Education have defined and continue to define. Furthermore, any new system does not start from a blank page – but takes and develops from what its predecessors and research have already established. Such development has to be negotiated with other role players in the field in order to fit into existing structures.

Therefore a teachers' quality system and its manual will have to fit into the existing systems that fulfill micro monitoring and evaluation function with clear, documented links to national quality assurance bodies that discharge these functions. National quality assurance bodies in turn should co-ordinate teachers work with the manual (Kotecha & Luckett, 2000:206) to create conditions in the OBE driven C2005 for acquisition of skills and attitudes, which will aim at producing thinking and competent future citizens (DoE, 1996:3).

Kotecha and Luckett (2000:206) claim that OBE is successfully being implemented in school systems in the USA, Australia, New Zealand and UK which faced similar problems of mass education, falling literacy rates and limited professionals with Science, Mathematics and Technology competences to compete internationally. They also claim that in the USA, which implemented OBE there was improvement in performance.

Botha and Hite (2000:13) are subsuming C2005 under OBE as described by Spady (1994:6). They contend that features of OBE are an integration of education and training, promotion of lifelong learning and others that are now the aims of C2005 in South Africa. C2005 is based on outcomes rather than content as such:

- it equips learners with knowledge, skills, values, attitudes and competencies needed to be successful;
- it encompasses a culture of human rights, multi-lingualism and reconciliation; and
- produces future thinking and competent citizens.

The approach is active constructive learner centered and allows pupils to learn at their own pace and focus on outcomes of significance that are related to real life.

According to Botha and Hite (2000:132) OBE is based on the idea that quality of education should be judged by focusing on whether the learner actually learns and how well the learner learns; and not quality of inputs and process, professional interactions and efforts. Assessment should not be norm-referenced fact oriented and written examination, but criterion referenced. Therefore it could be expected that quality assurance will follow suit.

4.13.1 **Quality assurance and stakeholders outside the school**

4.13.1.1 **Quality assurance and teachers' organised labour**

Quality assurance in both instructional leadership and curriculum development of C2005 is affected by technical and socio cultural conditions outside school and in the community. Therefore it is important to know which and how some conditions outside the school would assist or create difficulties in the quality assurance of instructional leadership and C2005 development. One important group that is external to school is the teachers' organised labour.

In SA teachers are organised into three teacher unions. These unions have negotiated and even rejected DAS as a quality assurance system. Current unions are the National Professional Teachers' Union of South Africa (NAPTOSA), the South African Democratic Teachers' Union (SADTU) and the South African Teachers' Union (SATU) (GCIS, 2002:205). A labour relations framework has been agreed with the minister of education and the unions encompassing negotiations and professional concerns including pedagogy and quality improvement strategies of curriculum delivery. Public and private partnership has also been encouraged to ensure that wherever government does not have enough funds for development, private enterprise comes in to lend support.

Trade unions have been in the forefront at the systemic level demanding that teachers' conditions of service be improved. In terms of quality, the National Professional Teachers' Organisation of South Africa (NAPTOSA) commissioned a study by Dr. Hayward in 2002. While the study was mainly on what the status of morale was among its members and how it could help raise morale among teachers, the study covered many aspects of teachers' concerns (Bot, 2003:1-6).

The findings of the research showed that lower levels of morale were caused by factors to do with the education departments and provincial leadership style and intervention (Bot, 2003:3). In the research, 50% of 270 respondents were interviewed, most of whom were teachers holding positions of responsibility in the schools and were responsible enough to make valid statements.

While the research may reflect the views of a section of teachers who are aligned to NAPTOSA, the views are valid because they derive form a big section of teachers. Indeed the research recommended that trade union movement should engage the department of education on policy formulation – that teachers be part of policy making. The union also recommended that the union representatives should negotiate with the minister of education for improved conditions of service for teachers. The report finally recommended that the union should organise seminars for members and communicate more efficiently with them (Bot, 2003:6).

The DoE however seems to be more policy oriented and interested in improving performance in science and mathematics subjects. Their consideration of reward to teachers is conditional to their role in promoting this objective, and maybe only because the DoE is also aware that education in SA has a general difficulty of losing teachers in large numbers. Most graduates in these subjects are migrating to Europe and America, and leaving teaching to take up more lucrative jobs in the manufacturing industries or migrating overseas (Ntuli, 2007:25).

At the time of writing, the general secretary of SADTU, Nxesi, recommended that a peer counseling programme should be instituted in the face of the high number of teachers dying of AIDS (Bot & Masehela, 2005:16). This would also lead to the establishment of counseling facilities

in schools. SADTU would establish a fund to help those affected and coordinate with the education department.

The necessity for solutions is highlighted by the research conducted by the UNAIDS covering over 71 ministries worldwide which concluded that "education departments worldwide are not prepared to deal with teachers and learners who are infected with HIV (Cullinan, 2006:7).

Furthermore, Bot (2005:1, 8) cites the World Bank report on the impact of HIV/AIDS on schools and teachers in SA showing that 12% of 350,000 teachers in SA are HIV positive. Deaths of teachers that could be related to HIV/AIDS complications as at 2005 were estimated at 4,000 a year. The incidence would affect quality and quality assurance of curriculum delivery of C2005 because even the enrolment figures of learners are expected to drop.

4.13.1.2 **Quality assurance and the community**

A Community is broadly defined as all individual and institutions in and out of school – that have a stake in the success of children in school in the well being of children and families – Epstein (Pretorius & Lemmer 1998:ix). They have a key role to play in supporting the school.

The SA government has now committed itself to a democratic process, where policy is formulated democratically by finding educational needs of the people through:

- broad consultations in giving people a chance to make an input;
- incorporating people's views in the legislated white paper; and
- expecting the schools and the community to implement education policy.

Furthermore, involvement of the community in quality assurance does not deny that teachers occupy a prominent position in schools in the process as practitioners (key position). The teacher and learner are at the heart of the education system. Hence, how well the system carries out the task of competent education depends on teachers' competence and dedication, knowledge, skill and motivation (Pretorius & Lemmer, 1998:xi). Yet, even the DoE recognises that socio economic status of children in the community has a determining effect on the performance of learners (DoE, 2005:2). Therefore it can be inferred that instructional leaders have to understand learners' communities in order to assure quality for the learners of such communities.

However, research by Smit and Liebenberg (2003:2-3) shows that there has not been research on parental involvement – but that the research exploration highlighted the following difficulties: there are widespread problems related to poverty, ignorance and crises of paying fees, relations between schools and parents and variation in their expectations.

Parents' expectations range from expecting teachers to take the role of parents during the school day to giving children security, care and social support. Parents expect teachers to provide for children's fundamental needs and to know their communities, to empathise and give emotional support to children (Smit and Liebenberg, 2003:4)

These expectations are too many and would logically contribute to teacher' difficulties. However, if the expectations were to be taken on board an effective quality assurance framework, Moloi, Grobler and Gravett (2002:88) suggest that the school, as a learning organisation would be the most relevant approach to deal with them, as circumstances of the external environment are changing very fast. Teachers must engage in generative learning, or adopt Senge's five disciplines, viz.

- Personal mastery
- Mental models
- Shared vision
- Team learning
- Systems thinking

Ross and Smith (Moloi et al, 2002:88) and Moloi (2002:xi) characterise a learning organisation as a school "where new and expansive patterns of thinking are nurtured, where collective aspiration is set free and where teachers are continually learning how to learn together". The focus of each school should be creation of an enabling culture, through enhanced individual commitment to continuous improvement, learning and growth.

A school as a learning organisation facilitates the five disciplines adopted from Senge as: -

- opening opportunities for learning;
- promoting inquiry and dialogue and risk taking by school teachers;
- encouraging collaboration;
- embracing creative tension as a source of energy and renewal in the school; and
- Taking the demands of other constituencies with influence on the teachers like the teachers' union movements into account (Moloi, 2002:6-20).

Teachers have to develop the school as a learning organisation to assure quality during change. Yet it is important at this stage to ask: Do teachers say that their schools are moving in the direction of becoming learning organisations? And could such learning organisations also facilitate quality assurance of the implementation of C2005, solve their difficulties and address other issues such as multiculturalism and HIV/AIDS?

4.14. Other issues impinging on quality in SA

4.14.1 Quality assurance in a multicultural society

In SA quality of education and quality assurance in the delivery of C2005 have to include multiculturalism. Meir and Lemmer (2001:332) in a research about multi cultural concerns of education in SA note that since 1994 there has been an open admission policy. They found that desegregation has opened doors for a mixed intake of learners in many schools. While there are many schools that retain their ethnic composition because of their geographical location, and these could expect to remain so, there are many schools that have admitted many ethnic and race groups. Quality education and quality assurance for learners and teachers in such schools will consist of change of attitudes and values to accommodate others of groups different to themselves.

Squelch (1993) argued convincingly that multicultural approach has to be adopted comprehensively in all training and in service courses, not only in those schools that are located in areas that serve multi ethnic groups.

Meir and Lemmer (2001:332) conducted a limited study that established that there are very few, if any, studies that have been done at all on the teacher conception and attitudes towards culturally diverse population in SA. The researchers cited the works of Rios (in Meir & Lemmer, 2001:332) in the United States, which indicated that different groups have different expectations, and so perceptions of quality in culturally diverse population would differ.

Meir and Lemmer (2001:334) also confirmed that teachers' conceptions are formed by among others, experiences and professional education. At the individual level, conceptions are located in the psyche. The psyche includes beliefs, values, biases, prejudices and generalisations drawn from personal experiences. As these also apply to learners, Meir and Lemmer (2001:334)

contend that they would also differ among learners depending on their background, class, religion, gender and culture. Other influences of perceptions are classroom conditions, socialisation and individual responses.

A pertinent question that could be asked in trying to solve the problem would be whether a solution would not be found in supplementing the progressive education that the teachers have obtained with deliberate preparation to react culturally in an accommodating manner. Such accommodation is presently being tested even under the challenge of the scourge of HIV/AIDS in schools (Bot & Masehela, 2002:11).

4.14.2 **Quality assurance and the challenge of HIV/AIDS**

The official position of the government on HIV/AIDS is that HIV/AIDS is a threat to quality education because it is killing a large number of experienced teachers. According to the World Bank and the South African Democratic Teacher's Union (SADTU) (Bot & Masehela, 2002:11), 4 000 or 12% of teachers are HIV positive. The Free State has the highest number of cases of HIV at 14.9%. It should be noted that while the figures are published from research and highlight the problem among teachers, parents and young people are also affected. In time there will be an increase in cases of orphans and low enrolment numbers of learners. Besides the fact that a quality education has to teach skills of combating HIV/AIDS, Quality assurance will have to take it into account. Badcock-Walters, Heart and Wilson (2002:1) conducted a research to develop a support system and mitigating the impact of HIV on education. The authors noted that HIV/AIDS is eroding the delivery of learning teaching and development to an unprecedented degree.

While the government started a programme to address the decline in the numbers of teachers resulting from HIV/AIDS, SA will have to recruit at least

30 000 teachers a year, but the country's maximum capacity is to produce only 20 000 in a year (Bot & Masehela, 2002:22).

However, the DoE has established a programme called Tirisano (which means to work together) and private organisations are also involved in promoting HIV/AIDS awareness in schools. Three objectives of Tirisano relating to HIV/AIDS are:

- Awareness, information and advocacy.
- To put HIV/AIDS within the curriculum.
- Planning to deal with HIV/AIDS in the whole education system.

It is important to establish what experiences instructional leaders have with HIV/AIDS within C2005 in schools and the role of quality assurance relating to the subject of HIV/AIDS and its effective handling.

4.15 Conclusion

In this chapter it was established that besides Matric examination, quality assurance in the C2005 was entrusted to OBE, SAQA and NQF when C2005 was first implemented in 1998. Formal quality assurance structures that dealt with instructional leaders were only put in place in 2001 at the time of review of C2005. The first systems that were proposed were DAS, followed by WSE. The third system is the Performance Management System (PMS). Since then there has been legislation to streamline the three given quality assurance systems by creating the Integrated Quality Assurance Management System (IQMS). However, IQMS does not address the immediate problems of implementation that instructional leaders have with C2005 adequately. This is in spite of the claims by the FSDoE that most trainers and teachers had received training in IQMS from the year 2005 (DoE, 2006:29). Literature suggests that it will be meaningful in the long run to incorporate tried and tested systems such as Total Quality Management and International Standards Organisation and include all national aspirations in a modified framework. These are compatible with

OBE and have an established culture. In chapter 5 the writing will briefly reflect on the appropriate empirical methodology to research these issues.

CHAPTER 5

RESEARCH METHODOLOGY AND DESIGN

5.1 Introduction

According to Henning, Van Rensburg and Smit (2004:1, 6), in order to decide on which methodology, methods and data sources are appropriate to use in a research, it is important to consider the research aim and the nature of questions that are to be addressed. It will be recalled that this research intends to examine and explore thoughts, understanding and meanings that instructional leaders give to the difficulties that they experience with instructional leadership, development and quality assurance of C2005 at school level (see sections 1.5, 1.6). Contingently the study seeks instructional leaders' views on whether existing quality assurance structures are addressing instructional leaders' difficulties. This latter is done with the view to improving the existing quality assurance structures and formulating an alternative holistic quality assurance framework with the input of instructional leaders (see section 1.5 and 1.6, bullet 5).

Phenomenology (explained in sub sections 5.2 and 5.3) was selected as the most direct method that would investigate how participants in the implementation of a C2005 come to understand their experience. Phenomenology allows a researcher to imagine him/herself in the shoes of the instructional leaders. From this point of view instructional leaders are allowed to speak for themselves and state how they understand the ease and difficulties of C2005 development and its quality assurance. The next section clarifies the choice of phenomenology within a specific context of research design.

5.2 Clarifying research design and methodology

Henning, Van Rensburg and Smit (2004:36) clarify research design as a conceptual imagery or an architectural impression of what the product of research is expected to look like. Henning et al. (2004:36) show that design is part of methodology. Henning et al. (2004:36) define methodology as "a coherent group of methods that complement one another and have the goodness of fit to deliver data and findings that reflect the research question and suit the purpose". According to Henning et al. (2004:36) methodology focuses on the process and the kinds of tools and procedures used while a method is a way of doing one thing.

In terms of research design, the architectural imagery of the research is a coherent and accurate picture of values, meanings and understanding that instructional leaders give to the instructional leadership, curriculum development and quality assurance difficulties that they experience in the development of C2005. In addition literature review that has been undertaken (see chapters 2, 3, 4) shows that a complete structure of the research product would show what was concluded in the research themes: instructional leadership, curriculum development, C2005, quality assurance perspective. Under these would be qualitative indicators such as inputs, process and outputs under the topic headings in the Free State. Finally the structure would indicate how the design could be measured qualitatively and manipulated positively to assure quality implementation of C2005 (see chapter 7) in the classroom.

5.3 Qualitative approach

To show the relevance of the qualitative approach the research reflects on the historical background and the theory and describes the different qualities of the qualitative approach. This background is given to place the methodology selected for the study in its proper historical, theoretical context and to show how the methodology, especially phenomenology as

principles, relates to the method. The background will also indicate that methodologies and methods overlap, and that while adopting one methodology, researchers often draw from other methodologies and methods to address specific problems (Bell, 1997:6).

5.3.1 **Background and relevance of the qualitative approach**

Keeves (1997:3-8) traces the origins of the qualitative paradigm to the mid 1970s and asserts that, qualitative paradigm is a product of the late nineteenth century epistemological debate over the two major paradigms that guide educational inquiry – positivist and interpretative paradigms. Specifically the limitation of the positivist, scientific method was that it failed to address the problems of understanding motives and bases of beliefs, habits and other socio-psychological preferences of people. The finality of the debate about the use of the two paradigms and how they affect research projects such as this one is that researchers use each of the different paradigms where it is suitable. In this case the qualitative paradigm is more suitable. Table 5.1 describes the qualitative paradigm.

Table 5.1 Basic qualities that distinguish qualitative research

	Qualitative Research
What it does	Captures and discovers meaning of experience.
Properties	It has concepts that are presented in the form of themes, generalisations, and taxonomies.
Advantage	Allows creation of measures in an ad hoc manner, often specific to the individual setting or researcher.
Form	Data are often in the form of words from documents, observations, and transcripts.
Procedure	Research procedures are particular, and replication is very rare. Analysis proceeds by extracting themes from evidence and organising data to present a coherent, consistent picture.
Theory	Theory can be causal or non-causal and is often inductive.

Adapted from (Neuman, 2000:16)

The advantage of applying qualitative inquiry on C2005 is that one is able to interpret the world from the point of view of instructional leaders who are involved in the implementation of C2005, to give careful descriptions of what goes on in the schools and classrooms (Leedy & Ormrod, 2005:135). From Table 5.1 it can also be inferred that the relevance of qualitative paradigm to the study is that it emphasises the situational context, observing performance in the natural setting rather than in a test situation, it rejects sophisticated statistical analysis and randomised designs. As a further advantage, Kopkewitz (in Keeves, 1997:4) asserts that educational qualitative inquiry is motivated by the aspirations, values and opinions of the communities to improve the quality of their lives. Ideally if resources and time allowed, the study would have included all public secondary schools in the Free State. However, because of constraints imposed by limited resources and time, the phenomenology was applied on a sample.

5.3.2 **Rationale for adopting a phenomenological variant of qualitative research**

Theoretically this study was conducted within phenomenology, which is a branch of the qualitative paradigm. Henning et al. (2004; 9) confirm that the study is phenomenological when it seeks and describes, understands (verstehen) and explains (erklaren) subjects' actions and their life world (lebenswerlt) in the context within which the experiences and actions occur. This study employs phenomenology as a method to describe lived experience of DoE officials, principals, HoDs and teachers (de Vos, Strydom, Fouche & Delport, 2006:270).

Creswell (1998:36), Neuman (2000:22) and Henning et al. (2004:20) elucidate qualitative research design and phenomenological method that are used in this research further. However, Neuman (2000:22) argues that methodologies overlap and do not exist in a pure form; there are elements of descriptive research when a study gives a detailed and highly accurate

picture of the subject of study. Henning et al. (2004:20-21) also asserts that elements of interpretive approach as a method are present when reality is studied by looking at participants' definition of the situation. Nevertheless according to Henning et al. (2004:20-21), the interpretive approach extends phenomenology because the interpretive approach assumes that knowledge is not only constructed by looking at phenomena but by descriptions of peoples' intentions, beliefs, values and reasons, meanings and self understanding. Overall the study is situated in qualitative paradigm.

While the main technique of data gathering that is used within phenomenology in the study is interviewing, it must be noted that there are elements of descriptive and interpretive approaches in the study because education is multivariate and multidisciplinary (Keeves, 1997:5), However such elements are only included where they are relevant to the study.

According to Creswell (1998:31-55), phenomenological method is applied in its sociological variant form in studies similar to this research through bracketing. Bracketing means that the investigator suspends his/her preconceptions and writes about the meaning that individuals give to their everyday lived experience. Phenomenology and bracketing are adopted in this research and DoE officials and instructional leaders are asked through interview schedules, to state their lived experience in the development of C2005 and quality assurance at school level and classroom. The research also elicits the views of all participants on the next step that could be taken following identification of the difficulties and their sources.

Finally, the empirical research questions and their answers were linked to literature and theory of education. Linking the questions that were presented to respondents and their answers to literature was vital because it enabled the results of the study to be related to known facts. The linkage

also ensured that the findings would be given added validity. The next sub section highlights the scientific and empirical procedure that was followed to produce evidence in the research.

5.3.3 **Empirical procedure in the study**

According to Encyclopaedia Britannica (1974:766) empiricism is acceptance of facts on the basis of evidence. The practical aspect of the research is empirical because it adopts a scientific attitude and procedural methods in gathering information and first hand evidence about a real life experience and phenomenon of C2005 development (Cohen & Manion, 1992:4, 13, 20; Encyclopaedia Britannica, 1974:766). Cohen and Manion (1992:4) assert that empirical research is the best way of obtaining information and developing reliable knowledge to solve practical problems.

Empirical procedure is an orientation which is given to the qualitative design in this case to enhance rigour of method and credibility of results. Information that has been generated from teachers in this research is submitted as evidence and treated as social facts about the development of C2005 at school and classroom levels (Encyclopaedia Britannica, 1974:989). The interview questions (instruments) that were used, specifically sought facts about the origins, nature and development of the difficulties that instructional leaders have experienced in C2005. The logic of the research is that determining the nature, source, the meanings that the practitioners give to the difficulties that they experience in implementing C2005, would suggest possible solutions to such difficulties. The next step explains why a sample was used and presents an appropriate sampling technique used to choose a sample that would meet the purpose of the research and obtain valid and reliable information.

5.4 The rationale for sampling and techniques used

The target population for this study is all public schools in the Free State province. Since the research is self financed, financial, time and manpower constraints led to the reduction of the coverage of the study to a sample, which Cohen and Manion (1992:88-89) assert, has as many advantages as a whole survey itself where there are problems of covering the whole population.

The total figures for the universe and sample are given in section 1.8.2. When the figures are narrowed down to include only ordinary secondary schools from which the sample was drawn, Motheo had 50 and Thabo Mofutsanyana had 71 ordinary secondary schools. The total target population from which the sample of 9 ordinary secondary schools was drawn is 121. The schools employ a total academic staff of 3247 of which 23 were interviewed. One thousand five hundred and seventy (1570) teachers are employed in Motheo while 1677 are employed in Thabo Mofutsanyana (EMIS, 2006).

The classification of schools into public and independent schools is based on the mode of finance that the schools receive – public schools are financed from the public purse. In informal discussions, officials of the Department of Education in 2002, indicated to the researcher that ownership of some schools situated on farms is being reviewed and that many farm schools are closing down because of dwindling numbers of learners and other viability reasons (FSDoE, 2007).

Further classification of schools by socio economic and geographical locations gives rise to the groups: urban schools, peri-urban or township schools, rural and deep rural schools (the last category refers to the remaining farm schools). While the DoE requires that educational research should cover a cross-section of the different types of schools, limited

resources and time meant that such coverage could not be achieved in this research. The study only covered urban, township and rural schools that have implemented C2005.

5.4.1 **Sampling technique**

Purposive sampling was used in the study to target participants who have been involved in C2005 (NCS). This method is non probabilistic and would not allow generalisation on the basis of the findings. However the study is not intended to generalise. Rather it is intended to accumulate useful knowledge that could be used by policy makers and other stakeholders in the implementation of OBE driven C2005 at GET band, grades 7 - 9 to make informed decisions. Nevertheless an attempt was made to interview the maximum recommended number of participants, in order to reduce sampling bias and enhance validity and reliability. Creswell (1998:54) and (Leedy & Ormrod, 2005:139) recommend that a phenomenological study should include interviews of between 5 and 25 participants. Twenty three (23) participants were interviewed in this study. Moreover, the researcher rigorously employed other established technical measures to ensure that the sample would be valid.

5.4.2 **Sampling procedure followed in the study**

The study targeted all public schools in the Free State province. Due to the limited resources and time, only two administrative districts could be sampled, they are: Motheo and Thabo Mofutsanyana. Within these districts, a deliberate attempt was made to sample a cross section of schools according to the DoE classification. Therefore schools were selected on the basis of their geographical location; in the Free State and whether they were from the urban area, township or rural area. They were summarily classified as urban, peri urban, rural schools and deep rural schools. At the time of writing, the DoE insisted that educational research had to include a cross section of the different types of schools, if it was to be useful to the DoE.

The other reason for the choice of the areas for research was their proximity to the centre for the study, the University of the Free State. The areas were also accessible to the researcher as he shuttled between two locations, Thaba Nchu and Maseru, in the time of the research. The limited time and finance also played a part in the choice and size of the sample. Nevertheless, schools that were included in the sample would fit the description of a public ordinary secondary school anywhere in the Free State and in the country as a whole.

Another important detail is that the research sample targeted schools and individuals who had participated in the development of C2005 (including design, dissemination, implementation and evaluation). The study used convenience sampling to a limited extent to cover the scattered schools in the rural areas on the basis of their proximity to the road and accessibility. Cohen and Manion (1992:88-89) have documented this method of choosing a sample and assert that it is legitimate. In the sample selection for this study schools and individuals who were nearest in characteristics to the population under study were included until the determined number of the sample was reached.

5.4.3 **Characteristics of the sample**

The sample was drawn from the following relevant groups:

- Senior Officials of the DoE, especially in the Free State who are in charge of implementation of C2005. The sample comprised three (3) officials of the DoE in different capacities from the director to senior education officer in the C2005 implementation.
- School leaders, principals, HoDs and teachers in public schools. Principals of five (5) public schools that have grades 7-9 were chosen and approached for interview. Five (5) HoDs and ten (10) teachers were interviewed. A sample of nine (9) schools was drawn from the

following locations in the Free State: Bloemfontein, Botshabelo, Thaba Nchu, Tweespruit, Ladybrand, Clocolan and Ficksburg. These areas represent two of the administrative districts of the Ministry of Education, Motheo and Thabo Mofutsanyana.

In terms of the sample size, Cohen and Manion (1992:90) state that there is no correct sample for a study. Each study depends on the stated purpose and nature of population. To a large extent, the population of instructional leaders targeted by this study is homogeneous, as far as the purpose of establishing the difficulties that instructional leaders experience in the implementation of C2005, and quality assurance are concerned.

The final size of the sample in the study worked out to 3 DoE officials, 5 principals, 5 HoDs and 10 teachers. While the initial aim was to interview 25 people, the unsuccessful repeated attempts by the researcher to get two DoE officials to give interviews led to inclusion of only 23 interviewees. Nine (9) secondary schools were visited in 2 educational districts - Motheo and Thabo Mofutsanyana.

The FSDoE requires that educational research in the province should include a cross section of schools, including urban, peri urban, rural and deep rural schools (See permission letter, Appendix B). In order to satisfy this requirement, two schools (N1 and N2) were chosen in Bloemfontein to represent urban schools, as they are located in an urban area. One school, N3, is located in Botshabelo, Thaba Nchu (N5) and Ficksburg (N9), were chosen to represent township schools. Of the remaining schools, one is located in Tweespruit (N6), two in Ladybrand (N6 and N7), one in Clocolan (N8), and represented rural schools. The designation is because their communities depend on farming for their livelihood.

In this arrangement, officials of the FSDoE acted as sensors that indicate whether the information about the difficulties that teachers experience is

filtering through to the DoE, because of their position in the dissemination of C2005 guidelines.

The researcher's interest in the senior phase is based on the fact that according to DoE advocacy paper (DoE, August 2001); grade 9 is the first critical exit point where learners are set to write a summative examination - the Common Test of Assessment (CTA) for a certificate. Moreover, the senior phase is the last part of compulsory education and the point at which learners could branch to many training institutions; it is the last point of implementation of the NCS (see sections 3.5.4 & 3.5.5; Table 3.3). When learners complete this level, they could go on to FET, or seek employment. Therefore, the researcher is interested to see that, when the school leavers finish grade 9, they would have the best preparation that the education system and the school have to give them. Ideally a good indication of the difficulties that instructional leaders have and the meaning they give to their experiences would have been obtained by looking at the whole population, but as it has been pointed out, financial constraints and time only allowed the use of a sample.

To its merit, the sample is representative of the cross section of schools in the Free State to a certain extent. However, it is not the purpose of this qualitative research to generalise on the patterns of the population on the basis of the findings regarding the sample; its purpose is to address existing problems. Thus, it can only be inferred that, where appropriate, findings from this research could be used for other areas of the country with similar circumstances, owing to the rigour with which research instruments were constructed, validated and used.

5.5 Construction and validation of interview schedule/s

Literature on instructional leadership organisational positions and functioning in the educational systems was the first source of the details

used in the construction of interview schedules for the study. Literature was explored to identify the ease and difficulties that instructional leaders experience in their development of C2005 at GET and their possible source (see chapter 2). An analysis of this literature shows that the functions can be classified into types relating to foundational, practical and reflexive values and competencies for principals, HoDs and for teachers (Harley, Bertram & Mattson, 1999:4-5). The competencies could also be classified under stages of the development of C2005, viz. design, dissemination, implementation and evaluation. They could even be classified under indicators of teacher and school performance that are used by the DoE; context, inputs, processes and outputs.

In this regard Oppenheim (1992:159) states that the integral aspects of the intended educational process give a research instrument its characteristics. Added to the characteristics, are the conditions of application of the instrument that according to Oppenheim are sufficient conditions for reliability of the instrument.

Questions were also developed for officials of the Department of Education. These asked officials how they saw and understood instructional leaders' performing in C2005. The areas covered by the interview schedule for the different groups were the same. The areas were: instructional leadership, curriculum development and a quality assurance perspective (confirm sections 1.4, 1.5, 1.6).

The following important measures were taken in designing the interview schedules:

- Language was simplified to ensure that respondents understood the questions and answer from understanding.
- Questions were also reduced to obtain an accurate picture of the participants while not taking too much of the participants' time.

- The questions were framed to address what respondents do routinely at work.
- The questions were sequenced to start with general and simple and progress to slightly harder questions.
- The questions were designed to cover the subject being studied adequately (its validity)
- The interview schedule was piloted to ensure that it had the desired qualities of measuring and facilitating one to draw logical conclusions on the issue under study (Leedy & Ormrod, 2005:147-150).

5.5.1 **Interview Schedule**

The interview schedule designed for the study was semi structured to provide flexibility for the respondents to give detailed responses (Bell, 1997:94). Neumann (2000:37) recounts the central characteristics of exploratory interviews that are similar to those that were carried out in this study as:

- having a beginning and an end;
- asking the same standard questions to all interviewees in the same order;
- putting the interviewer in a neutral position;
- a one-way process in which the interviewer asks questions and the interviewee answers;
- being conducted with the interviewer and interviewee alone;
- having a professional tone and businesslike focus, ignoring diversions;
- allowing the interviewer to set the pace and direction of the interview;
- independent of the social context, such that it could be done anywhere; and
- allowing the interviewer to mould the communication pattern into a standard framework.

The interviewer however would still vary and adapt these conditions depending on the circumstances of the field.

Otherwise, given the choice of several measuring instruments in social sciences that include tests, questionnaires, observation schedules used to collect data (Anderson, 1994:109), the interview schedule/ questionnaire that are answered orally was identified as the most appropriate in the conditions of the researcher.

The structure of the instrument was appropriate for gathering qualitative data through discussions with the participating designers and implementers of C2005. The instrument also fitted the established methods of bracketing within phenomenology (Cohen & Manion, 1992:296-334; Leedy & Ormrod, 2005:139-140). The interview schedules appear in appendices E and Ei-iv. The interview schedules that were presented to the officials of the DoE, principals, HoDs and teachers were more or less the same in content and required them to say:

1. With what ease and difficulties principals, HoDs and teachers have interpreted C2005 guidelines in their respective levels, designed, scheduled, paced, delivered (instructional leadership) and evaluated C2005 in classrooms.

2. What ease and difficulties principals, HoDs and teachers have experienced in their different roles to contextually design, make input in the implementation and evaluation processes of C2005 for their schools (curriculum development) and learners.

3. Whether the current quality assurance measures for C2005 adequately and inadequately address the difficulties that instructional leaders have with translating C2005 guidelines, designing, implementing and evaluating the curriculum at school and classroom levels.

4. Whether they could suggest anything else that could be done to improve the existing quality assurance structures so that they can pre-empt and

solve the difficulties that instructional leaders experience and design a new quality assurance framework. Were their schools learning organisations? Were the teachers and schools prepared to deal with HIV/AIDS and Multiculturalism that also impinge on quality now?

The schedule/interview questions ended with a line thanking the participants for giving some of their time to answer the questions (see Appendices E, Ei - Eiv).

In order to ascertain that the questions address the problems of instructional leaders, the instrument was discussed with three teachers. The teachers were asked whether the questions were reflective of the concerns and problems that teachers experience in the implementation of C2005. (There are notes in the research logbook to confirm the discussions).

However, the three participants that were interviewed in the pilot said that the estimated time of 45 minutes was too long. Yet once the interview started the pilot interviewees continued talking beyond 45 minutes.

Regarding the content of the questions, the three interviewees indicated that the questions captured the essence of the difficulties that personnel experienced at the school level in the implementation of C2005. The responses confirmed the issues that one official of the DoE (in private discussion) and two teachers saw as the main problem in the preparations and implementation of C2005.

The pilot teachers were uncertain about the appropriate title for C2005. Two insisted that C2005 no longer exists. They insisted that presently they are dealing with RNCS. This was in May, a month before the researcher learned that the title of RNCS would be replaced by NCS. The relationship

between these titles and why C2005 is used in this research are explained in sections 1.1 and 1.13.2. The next task was to carry out the interviews.

5.5.2 **Administration of interviews schedules**

The researcher had approached the provincial office of DoE requesting permission to put the questions to the interviewees in schools. The director of quality assurance granted permission in February, 2006 and the researcher immediately prepared and piloted the interview schedules, finalised them and ensured their validity. Interviews were administered from the 5 of April, 2006, starting with the officials of the FSDoE. Interviews went on up to the 30 May, 2006. The interviews had to be completed in this time because the DoE requires that research should not be undertaken in the third and fourth terms. The FSDoE letter explains that the restriction is imposed to avoid disruption of preparations for examinations (Appendix C(i)).

On the day of the interview, each of the selected three (3) FSDoE officials, principals, HoDs and teachers was given the forty minute interview schedules 5 minutes ahead of the start of the interviews. The purpose of giving them questions in advance was to enable them to formulate detailed, thought out discussions about their understanding of the easy and difficult experiences that they encounter on a daily basis in classrooms. The given time would also enable them to take stock and say what works for them in the interpretation and translation of C2005 guidelines into implemented programmes. They were given time to ponder the possible causes of the difficulties and how the problems could be addressed.

The research participants were asked to elaborate on what they understand to be easy and what is difficult in the interpretation and implementation of C2005 guidelines in the classrooms in the GET senior phase grades 7-9. Officials of the DoE would be asked about what they see from their own

point of view as the problems for instructional leaders to accurately interpret and implement C2005 at classroom level.

Participants were asked for permission to allow the researcher to confidentially record their responses with an audiotape so that the researcher could replay the interviews and fill in the gaps in handwritten notes. The use of the audiotape ensured that the information recorded in the logbook and the tape could be crosschecked and corrected wherever there was some inclarity.

The interviews were conducted at the locations of work of participants, and at a convenient time for them, so that the essence of the environment in which C2005 is developed would be captured.

Finally interviewees were given assurance that the discussion would be treated as confidential. All participants, except one, agreed that interviews could be recorded.

5.5.3 **Interviewing techniques**

There was an attempt to proceed with the interviews in an orderly manner starting with the officials of the DoE. This plan was abandoned because of the need to finish the interviews with teachers quickly, as the second term was coming to the end. Subsequently an operational plan was to focus on principals, HoDs and teachers first, and fit the DoE officials when there was time before the end of the instruction day or afterwards. Moreover the interviews were fitted into a very tight schedule of rushing from class most of the time from a college in Maseru, Lesotho where the researcher was holding a full time job. The researcher had to drive over 20 to 120 kilometres to reach the schools. On average, two interviews were conducted in each of the sample schools on the arranged day. The

interviews were completed over a period of two months from late April to the middle of June 2006.

5.5.4 **Response Analysis**

Interviews were analysed through inductive procedure that helps to interpret qualitative data in phenomenological research tradition (Creswell, 1998:51-55). Themes were developed and interviewees' statements and the meanings that they give to the difficult experience in instructional leadership, curriculum development of C2005 and quality assurance were noted. Suggestions about what could be done to further improve cohesion in the interpretation and transfer of C2005 policy documents and guidelines were noted and together with literature study formed the body of recommendations of the study.

Moreover, in analysing the responses the researcher relied on both the expertise gained from previous research interviews and phenomenological methods of analysis referred to as bracketing (Cohen and Manion, 1992:329-334). Interviews were transcribed and themes established to form a frame for analysis. Data was captured on the computer in the form of verbatim statements that directly answered questions that were asked. Themes that were developed were shared with an independent colleague who holds a Master of Education degree at the college where the researcher teaches. The information was interpreted and descriptions were developed with reference to literature responses to support teachers' statements. Finally a report was written and integrated into the theoretical aspects of literature as the last part of the study to gain further validity and reliability for the study.

5.6 Validity and Reliability of interview procedures and results

Validity is the extent to which a measure (indicant) provides an accurate empirical representation of the concept that it purports to measure. Validity

is also the extent to which the process of research and conclusions that were reached are credible (Keeves, 1997:61, 322- 324). Keeves (1997:61, 322- 324) goes further to point out that it is the interpretation of the data arising from a specified procedure (method) that is validated in research. Validity of measures looks at the extent to which the content of the measure corresponds to that of the theoretical concept being measured. The most important types of validity in the interview schedule about thoughts, understanding and meanings of instructional leaders are: face validity, content validity, and construct validity.

Hopkins (1992:68) asserts that the methods which are identified as the most appropriate methods of gathering data about the issue under study give the instruments face and construct validity. In this case a purposive sample of people directly involved in C2005 at different stages and interviews has been identified for the research as the most appropriate methods of gathering data on the facts, thoughts, understanding and meanings of principals and teachers.

Face validity refers to whether the instrument/s used in the research reflects the apparent purpose of the study (Thyne, 1974:4–5; Quilter, 1999:238-9). In this case the interview questions were designed with the main concerns of the study; instructional leadership, C2005 development and quality assurance (confirm with sections 1.4, 1.5, and 1.6 that give the problems) and literature in chapters 2, 3, 4. The questions asked instructional leaders to state their views and understanding of the difficulties of translating C2005 guidelines to classroom lessons. Furthermore the questions took cognisance of the prescriptions of SACE, ELRC and SASA to instructional leaders (see section 2.7.2, Table 2.2). Thus the content of the questions testified to content validity of the instruments.

The interview schedules also had construct validity. Construct validity refers to the fact that the instrument contained the concept and purpose of what it is measuring. The study instruments contained the concept of difficulties that teachers experience in the translation of C2005 guidelines to classroom lessons that is at the centre of the research (Thyne, 1984:3-4). This construct was also discussed with two experts in the field of social research, in the School of Education at the University of the Free State. Moreover the instruments were piloted and improved (see section 5.5). Validity and reliability will further be enhanced by quotations of what interview participants said verbatim to produce thick descriptions of lived experience. Furthermore three strong factors that validate the research are that the researcher was able to look at the instructional leaders from an outsider's perspective (Anderson, 1994:147-155). Besides, the researcher realised that more relevant information could be obtained by continuously following the issues of instructional leadership and C2005 development in the classrooms. This was done through reading official documents on the government website and intermittently talking about progress of C2005 implementation with teachers who are involved in the implementation of C2005 (Leedy & Ormrod, 2005:100,143-144). Other steps were taken to improve reliability of the measures, the procedures to give added credibility to the findings.

5.6.1 **Steps taken to ensure reliability of the procedure**

Reliability of measures is the accuracy with which observations are made and the data drawn in a study. It must be done so transparently and carefully that other researchers could replicate the study and get identical results under the same conditions (Frith & Macintosh, 1984:21).

Among the measures implemented to improve reliability of the interview schedule were: To ensure that the wording of the questions was clear and meant the same thing to all respondents (Bell, 1997:65). All the interviews

were taped with an audiotape and the tapes have been kept securely as a quality assurance measure, to be submitted if necessary to verify that the transcripts were accurate (de Vaus, 1986:46; Keeves, 1997:62).

The draft form of the interview schedules was checked by two academics from the Research Institute for Education Planning [RIEP] at the University of the Free State. The academics had been given the interview schedule with details of the context, in which the questions were framed, to:

- critically review the interview schedule to see whether its questions correspond to the problems that have been identified and confirmed by literature and teachers in schools;
- ensure that the instrument would tap the required information;
- verify that the schedule asked relevant questions that respondents would be able to answer;
- find and remove unnecessary wording;
- find and correct weaknesses on the clarity of questions; and
- ensure that the details of the questions reflected concerns of the DoE, the teachers and the study.

The academics suggested a closer link of the questions with the objectives of the study. They had also suggested replacing C2005 with RNCS. The former suggestions were taken into account while in the case of the latter it was decided to stay with C2005. This was because C2005 was still the officially reference to the OBE driven curriculum being implemented in the senior phase during the execution of this research.

Furthermore, interview schedules were piloted and the researcher asked the pilot sample of three respondents to state what they could not understand in the questions. This exercise refined the wording of the questions (Bell, 1997:65).

In any case, while Marshall (1997:75-76) takes reliability and validity tests as measures of the quality of research findings, he also asserts that there is no perfect reliability in social science; only degrees of reliability and validity are achievable. He advises that researchers must aim to achieve as high a level of reliability as possible. Oppenheim (1992:156) and Thyne (1974:5) concluded that instruments are only reliable and valid to a certain extent. Validity is not an all - or - nothing issue, but a matter of degree.

5.6.2 **Validity of measurement and analysis**

The questionnaire/measuring instrument had construct validity because it was developed from the literature details of instructional leadership and quality assurance of C2005. The questions were also discussed informally with one principal and a teacher to ensure that they explored issues of concern of instructional leaders. Three instructional leaders included in the pilot confirmed the centrality of the issues included in the questions. The themes that the Department of Education uses as indicators of quality have been incorporated in the measures also. These are: context, inputs, process and outputs. Furthermore some of the indicators of the Whole School Evaluation (WSE) dealing with Instructional leadership of C2005 development and quality assurance were included in the interview schedules.

The most important steps in interviewing is transcribing and interpreting the responses. The researcher is familiar with these steps and the processes that are involved in them because the researcher conducted interviews in a previous research for the award of the degree of Master of Arts in Education. Careful observance of research conventions in selecting interviewees precedes interviews. These are followed by more conventions of patient analysis and report of the results (Bell, 1993:98). These conventions are meant to give more credibility and validity to the results.

5.6.3 **Further improvement on validity and reliability of the interview schedule**

The researcher also consulted many texts and research manuals (which were similar in most respects irregardless of date) as a means of informing successful interviews on an ongoing basis (Anderson, 1994:222-232; Bell, 1994:64-66; Leedy & Ormrod, 2005:146-159; Mouton, 2001:99-110).

To further ensure that the interview schedule/questions and the results obtained from the interviews had improved validity and reliability, the schedules were designed to ensure anonymity; participants did not have to give their names. Besides, respondents were referred to in a general as one official, one principal, HoD or teacher.

Moreover, the questions were worded very carefully, in order to present the same meaning on the same question to all participants in each category accurately (Bell, 1997:65). To achieve this accuracy the results of the pilot interviews were taken into account in finalising the interview schedule.

The final transcripts were also given to three respondents of the actual interviews (code numbers 8, 14 and 18) who had been chosen randomly. The respondents were asked to look at the transcribed statements and indicate how much, and whether all or some statements represented their opinions. Their responses were that, there was no difference between the transcripts and what they said in the interviews. They also confirmed that the statements were accurate summaries of their responses. It became obvious that the respondents had saturated any possible difference in their view of the relationship between the taped interviews and the transcripts. The teachers' confirmation was regarded as a further validation of the conclusions that would be drawn from the transcripts (Leedy & Ormrod, 2005:100).

Furthermore, the results were analysed in two other different ways. The first method was to derive themes from responses of the officials, principals, HoDs and teachers expressed views, meanings and experiences in different areas of implementation of C2005. These areas that are also indicators are context, input, process and outputs. These overlap with design and dissemination, implementation and evaluation (see sections 6.5.1, 6.5.4 and Table 6.1). Another way was to aggregate responses under themes that were suggested by an independent critical academic in the college where the researcher works. The academic was given the questions and the transcripts to analyse. The academic arrived at more or less the same conclusions as the researcher. The next section explains the actual interviews and the professional code of conduct of research.

5.7 Observation of ethics, protocol and dealing with possible errors

All ethical conventions of research that include respect for the intellectual property of other scholars were observed in this study. Other scholars' work was used within reasonable limits and acknowledged. Furthermore, participants in the study were requested and volunteered to participate. Great care was taken to ensure that participants were not inconvenienced in any way. Moreover, appointments were made to suit participants' work schedules. Not only were participants promised anonymity and confidentiality, but their responses were coded. The research also addressed different possible errors that could occur at any point of the study and threaten validity and reliability of the findings.

To deal with such possible errors Mouton (2001: 101–110) and Oppenheim (1992:96) list the areas and stages where error could occur from data sources leading to incomplete information or lack of reliability. One of them is designing the instruments that are too long and failing to pilot them. Other errors could derive from the influence on respondents, capture, analysis and interpretation of data. All these areas were given

consideration to reduce the error and shortcomings of the research method. Where shortcomings could not be dealt with any further, they were acknowledged.

5.8 Conclusion

In this chapter a report of the context in which the research was undertaken has been presented. The logic behind the choice of qualitative design and phenomenological method of data gathering with interview instruments is given. The choice has been determined with consideration of the aim of the research, which is to understand first hand the views, understanding and meanings that instructional leaders have about the difficulties that they experience in translating C2005 guidelines into practice. The researcher assumes that gaining an insight into the difficulties experienced by instructional leaders would help the DoE and instructional leaders to work out possible solutions to the difficulties and assure quality outcomes.

Details covered in this chapter include the theoretical and practical organisation and implementation of the plan of the research. The sticking issues of the design and research methods that could challenge the validity and reliability of the study have been discussed and suggestions made on how to improve validity and reliability of the methods and the outcomes. The timing and direction of research as well as how the research will be reported and followed up are summarily presented. The next chapter addresses the empirical process of the research.

CHAPTER 6

RESULTS OF THE QUALITATIVE STUDY

6.1 Introduction

In chapter 6, the aims and objectives of probing into the ease and difficulties that instructional leaders experience in translating C2005 guidelines into classroom programmes are brought to the fore for empirical investigation. In order to conduct a systematic investigation, the objectives (confirm [cf] 1.6) were analysed within the topic headings; instructional leadership, curriculum development and quality assurance perspective/viewpoint. The latter three broad functions, were further sub divided into process indicators; design, dissemination, implementation and evaluation of instructional leaders' tasks. However, in most instances these indicators overlapped with the indicators that have been adopted by the DoE, viz. context, inputs, processes, outputs and were used interchangeably. The topic areas, indicators and the interview questions were informed by literature reviewed in chapters 2, 3, 4.

Research questions that were formulated from the primary literature review sources influenced the choice of the phenomenological method and interview techniques for use in the research (detailed in sections 5.2, 5.3.2, 5.5 and 5.6). Precisely because the questions sought to directly establish the practical daily experiences of instructional leaders (questions in appendices E, Ei-iv). Starting with empirical enquiry, the rest of the chapter presents what was done to pilot the questions, interview, capture and present responses in the patterns that become evident when responses are analysed.

6.2 Empirical enquiry

Empirical enquiry refers to the practical application of selected methods and asking questions to obtain information as explained in sections 5.5 and 5.5.1. All participants were given the two versions of the questions/interview schedule. Participants were made aware that they could use any of the two interview schedules that they felt comfortable with, to discuss their thoughts, understanding and the meanings that they give to their experiences (see Appendices E – E iv). The interviews were administered to officials and instructional leaders selected to satisfy the DoE requirement, at the time of writing, that educational research should include urban, township, rural and deep rural schools (see section 5.4.2).

To secure anonymity of participants, while not losing track of the individuals, a code system of allocating numbers to individuals was developed. The officials were given code numbers from 1 to 3. Principals were allocated 4 to 8, HoDs 9 to 13 and teachers 14 to 23. Within the code number range for a group (e.g. 1 to 3) the participants were arranged in the order in which they were interviewed. Groups were placed in order of seniority of their office. However to protect the identities of the participants the phrases "one official, one principal, HoD or even one teacher or respondent" are used when referring to the participants. In the next section the content and structure of questions (interview schedule) that were piloted with three instructional leaders are clarified.

6.3 Piloting the Measuring instrument

In terms of the structure of the interview schedule, the first part of the instrument asked general questions that are intended to gather information about the identity of participants and in which the context instructional leaders work. The interview started with simpler questions that would help the interviewee to develop confidence. This would also develop confidence

between the participants and the researcher (Anderson, 1994:233). These developments were also observed in the pilot interviews.

One official of the FSDoE and two teachers were chosen randomly. The official was chosen from the directorates that deal with the implementation of C2005 while teachers were chosen from the schools that had already been identified as falling into the sample. The three were asked to give an interview and indicate whether the questions were clear and whether the interview schedule/questions looked presentable. The teachers were asked to fill the parts that asked about the personal details and the interview was conducted in the same way that it was going to be in actual conditions. The researcher timed the interview and took notes. The results are presented below.

6.3.1 **The results of the pilot interview**

The three teachers on whom the interviews/questions were piloted were regarded as sufficient because they represented 21% of the 23 respondents that would be approached in the actual interviews (Leedy & Ormrod, 2005:139-140).

To improve the original interview schedule as a result of the findings from the pilot study, the researcher developed a shorter and detailed version of the interview schedule in preparation for the actual interviews. The adjustments were shown to the pilot interviewees who said that the questions had been clarified. The researcher presented the shorter and the detailed questions for the actual interviews and participants used any one they felt comfortable with (see Appendices E to E (iv)).

6.3.2 **Preparations for the actual interviews**

It is worth noting that the FSDoE granted permission on condition that the research would not be carried out in the third term; that it would not interfere

with instruction time and the names of schools and teachers that participated would not be disclosed (see section 5.4.2 & Appendix C (I)).

The researcher accepted the conditions and signed a document at the FSDoE binding himself to observe the conditions. In further preparation for the actual fieldwork the researcher bought an audiotape and empty tapes with a view to record the interviews. This would enable the researcher to replay the interviews and identify the exact words used by the participants in the interviews. The researcher also bought a two-quire exercise book to keep a diary of the fieldwork as a quality assurance measure. Once preparations were completed, interviews started.

6.4 Description of the actual interviews

The actual interviews started on the 5th April, 2006. The details of interview protocol were the same for all respondents. In the visits to interview respondents, the researcher arrived at the offices of the DoE official, principal, HoD or the teachers 15 minutes before the agreed time of interview.

Officials of the FSDoE preferred to have the interviews after lunch; at 2:00 pm. Principals preferred 8:00 am and 3:00 pm while teachers set their interviews for the end of instruction time. Most of the schools end their instruction at 1:45 pm. A few end at 2:00 pm.

The first two participants to be interviewed were officials of the FSDoE who have participated in the NCS design at the national level. At the time of the research, the officials in their different capacities also shared the responsibility of disseminating the curriculum from the provincial directorate. After interviewing the third FSDoE official, the researcher proceeded to principals, HoDs and teachers who implement C2005 in practice.

On the days in which interviews were to be conducted, by a common agreement with the researcher, each participant found a quiet room for the interview. Once the two were settled, the researcher gave the questions to the participant to read. Looking back at the interview protocol, the researcher notices that without design most interviews were conducted in the rooms of senior personnel of the schools. Two teachers' interviews took place in the classrooms and three took place in the staffroom.

To start the actual interview process, the researcher clarified the main areas of concern and requested permission from the participant to record the interview. Moreover writing notes is less reliable compared to a tape recorder even though the two are appropriate, valid and adequate tools in the circumstances of the research and the researcher (Bell, 1997:63). To these methods, however, one needs to add the researcher's personal experience in order to capture the essence of urban and rural settings of the schools.

The two urban schools which were visited can easily be distinguished from other types of schools in the sample because they are situated along streets that have names and streets numbers. Besides the streets that serve as an easy point of reference for urban schools, their outward appearance is more glamorous and expensive. While one of the schools is located on a small piece of land, of approximately 200m x 150m, it is an exception. The other school is located on approximately 400m x 250m of land, with more sporting facilities, cleaner surroundings and costly furnishings in the offices and classrooms. There is a businesslike air of a disciplined approach to work in the urban schools that were visited. This was evident in the manner of interaction of staff among themselves and with the visiting researcher.

These characteristics, together with security guards at the gates of urban schools differentiate urban schools from township and rural schools.

Township and rural schools commonly have 6 to 7 long blocks/columns of seven or eight classrooms, of 8m x 8m built with red bricks. In many cases rural schools were built with prefabricated material or red bricks. Most of the schools are built on approximately 200m x 200m of land. All schools displayed individual identity traits such as uniforms, the coat of arms and a motto. Outwardly, there was no evidence of OBE symbols and culture. While all the schools were very hospitable and helpful to the researcher, urban schools showed a more pronounced eagerness than rural townships schools to tell their story of successes. Urban schools were more organised, quicker to accept the request and arrange for the interview.

In the actual process of interview, in order to put the participants at ease and to win a measure of confidence of the participants, the researcher gave the volunteering participant a warm greeting. The greetings were usually followed by a discussion of neutral issues such as the working day, weather, environment etc. These are platitudes that Sotho-Tswana groups use to put one another at ease. Once the atmosphere for discussion was established in the room, in a sitting order that suited the respondent, the researcher gave his name again, in a relaxed manner, explaining that he is a lecturer and a research student at the University of the Free State.

The researcher shared the topic documents with the respondent and explained the purpose of the study again. Participants were given approximately five (5) minutes to read the questions. The researcher indicated that the questions were a guide to what was expected to be an open discussion of the experiences of participants.

The researcher asked the respondents whether they fully understood the questions. It was usually at this point, that the researcher also requested permission from respondents, to tape the discussion for further reference. In all cases except one, participants gave the interviewer permission and

the audiotape was put on at the time of starting the interview. This was also recorded in the logbook.

If any part of the questions was not very clear to the respondents, the researcher gave further break down, and examples that simplified and gave a partial structure to the interview schedule (see Appendices E and Ei-Eiv). The majority of respondents preferred to use the schedule with a break down of questions. The researcher read one question at a time as the respondent looked at his/her own copy. Then the respondent was left to explain, while the researcher listened, took notes, and the audiotape recorded the conversation. The researcher has kept a logbook, for verification that the interviews took place in the way that the researcher describes them. The respondent proceeded to give comment until s/he felt that s/he had exhaustively answered a question.

Meanwhile, the researcher wrote what the respondents said verbatim. There were usually only a few interruptions from the researcher to summarise, ask the respondent to confirm what was said and move on to the next question. As recommended in such research the respondents did most of the talking while the interviewer listened and noted the responses down (Bell, 1997:96-97). Each of the interviews took 30 to 45 minutes. The responses are presented in the next section.

6.5 Presentation of interview responses

The first part of the interview schedule asked participants to provide biographical (personal history) information about themselves, viz. age, gender and the number of years that the participant served in their respective positions of official, principal, Head of department or a teacher. For senior officials there was a question relevant to them, asking for them to write three duties that they considered as their main responsibilities. Copies of the interview schedules appear in Appendices E and Ei - Eiv. The

findings are presented in sections 6.5.4 for officials, 6.5.8 for principals, and 6.5.10 for HoDs and 6.5.12 for teachers. Conclusions from findings are presented in sections 7.2 onwards with recommendations.

With the benefit of hindsight, the process of interviews can be described as intense – because of the big number of people that the researcher met and interviewed within a short time. Interviews lasted five weeks in which four people were interviewed each week, with the three extra interviewees fitted in as well whenever the time suited them. The interviews yielded a minimum of 12 hours. The interviews have been kept on 16 audiotapes, each of which has one hour of recording space. The tapes along with a log book have been kept safely with the researcher for quality control. It is estimated that each hour of interviews took another four hours to transcribe and to analyse. This means that a minimum of 48 hours was used to complete the process of transcription and analysis.

The tradition of phenomenology that was adopted allowed the researcher a more or less abrupt entry and exit from the field to begin analysis and reporting (in June and July, 2006). However there was no time to appropriately close the field research with a debriefing of participants. Nevertheless, even though the researcher did not promise participants anything, the researcher is prepared to disseminate information about the findings, including to the participants, once the research project is complete. The theoretical framework for the analyses and the results of the interviews are presented in section 6.5.1, Table 6.1. The analyses of responses are presented in the same order as the interviews. The responses of the officials of the DoE are presented first, followed by those of principals, the HoDs' responses, and finally the teachers' responses.

6.5.1 **An analytical framework for interviews and the results**

Table 6.1 is intended to show that the research responses are analysed under the following topic headings: Instructional Leadership, Curriculum Development, Quality Assurance and Suggestions for an alternative quality assurance framework. Responses from a specific sample group are understood to embody the lived experiences of the group in the different stages of the development of C2005.

It is noted that the statements in Appendix F under code numbered respondents are fewer than what respondents said. They are theme statements. But they represent composites or the essence of what respondents said. These theme statements were obtained through phenomenological bracketing and reduction of interview statements that respondents gave; to the central meanings of the groups' lived experiences. The phenomenological procedure involves bringing together more than one statement with the same meanings and reducing them to a composite statement that best represents the meaning of all the aggregated statements (Cohen & Manion, 1992: 332-333; Creswell, 1998:52; Leedy & Ormrod, 2005: 139). Nevertheless, great care was taken to ensure that the final statements that were selected to represent units of meanings retain verbatim character.

The measures of the experiences were developed from the areas of the topic, literature review (design, dissemination, implementation and evaluation) and inductively synthesized with those that have been used by the DoE, viz. inputs, processes and outputs/ outcomes (Carl, 1995:48; DoE:2005; see Table 6.1). The resulting indicators are: Indicator 1 (Context, Input and Design (CID)), Indicator 2 (Process of Implementation (PoI)) and Indicator 3 (Evaluation for outcomes (E for O)). Outcomes in this research are all results of educational processes (see section 2.7.1 & Fig 2.4). The measures were used to develop the measuring instruments and to analyse

responses. Dissemination is understood to be embedded in the inputs (indicator one) in the form of the training that LFs give to teachers. Suggestions of an alternative quality assurance framework have not been broken down into context, process and evaluation for outcomes to avoid repetition. Moreover it is a small section.

Table 6.1 A framework for analysing interview responses

	Instructional Leadership			Curriculum Development			Quality Assurance perspective			Suggestions for developing an alternative QA Framework		
DoE officials	Context Input and Design (CID)	Process of Implementation (PoI)	Evaluation for Outcomes (E for O)	CID	PoI	E for O	CID	PoI	E for O	CID	PoI	E for O
Principals	Context Input and Design (CID)	Process of Implementation (PoI)	Evaluation for Outcomes (E for O)	CID	PoI	E for O	CID	PoI	E for O	CID	PoI	E for O
HoDs	Context Input and Design (CID)	Process of Implementation (PoI)	Evaluation for Outcomes (E for O)	CID	PoI	E for O	CID	PoI	E for O	CID	PoI	E for O
Teachers	Context Input and Design (CID)	Process of Implementation (PoI)	Evaluation for Outcomes (E for O)	CID	PoI	E for O	CID	Po I	E for O	CID	PoI	E for O

Designed with indicators from Carl (1995:48) and (DoE:2005)

The full terms of indicators are presented from the second to third columns from the left of the table and the second row from the top of Table 6.1. The abbreviations are given below the descriptors under instructional leadership.

As there is little space in the table to restate the indicators, abbreviations of descriptors are used for curriculum development, quality assurance and alternative framework. Table 6.2 gives a quick reference of the arrangement and the contents of the tables.

Table 6.2 A quick reference to the analytical tables in chapter 6

Tables	Content details of the tables
6.1	A framework for analysing interview responses
6.3	Gender and age of FSDoE officials who were interviewed
6.4	DoE officials' qualifications
6.5	The length of time that officials have served in their posts
6.6	Three duties that the DoE officials considered to be their main responsibilities
6.7	Responses of official 1 to the four main research questions
6.8	Responses of official 2 to the four main research questions
6.9	Responses of official 3 to the four main research questions
6.10	Distribution of principals, HoDs and teachers arranged by district and location of work
6.11	Biographical details of principals
6.12	Three duties that principals consider to be their main responsibilities
6.13	Thematic analysis of principals' responses to the four main research questions
6.14	Biographical details of HoDs
6.15	Three duties that HoDs consider to be their main responsibilities
6.16	Thematic analysis of HoDs' responses to the four main research questions
6.17	Biographical details of teachers
6.18	Thematic analysis of teachers' responses to the four main research questions
6.19	Teachers' suggestions of improvements
6.20	Common trends in all responses

6.5.2 **Demographic details of the DoE officials**

It is noted that the officials of the DoE were recorded first. Principals were recorded as a second group. Finally the HoDs and teachers were recorded.

Table 6.3 Gender and age of FSDoE officials who were interviewed

	20-25	26-30	31-35	36-40	41-45	46-50	50-
Male							1
Female			2				
Totals			2				1

In terms of the demographic (population dynamics) details of the FSDoE officials, two female officials and one male official participated in the research. They were valid respondents on the design, dissemination; implementation, evaluation of C2005 and its quality assurance because they were involved with the development of C2005 for varying lengths of time from its beginning to the time of writing.

Table 6.4 The FSDoE officials' qualifications

Code	Purely Academic:	BA Soc Sci
1	Professional:	B. Ed (Educational Management), Higher Education Diploma
2	Academic:	M.Ed (Education Planning)
	Professional:	Higher Education Diploma
3	Academic:	M.Ed (Applied linguistics)
	Professional:	Higher Education Diploma. Course for SAQA moderators

Two officials hold Masters level qualifications. While all officials are based in the Free State, officials 2 and 3 indicated that they participated in the national task teams that designed aspects of C2005.

Table 6.5 The length of time that officials have served in the present post

Official	Length of service
1. Senior Education Officer	1 year
2. Director	4½ years (four and a half years)
3. Programme Manager	3½ years (three and a half years)

Table 6.5 shows that of the three officials that were interviewed, officials 2 and 3 have been engaged with C2005 for much longer. It is not known whether official 1 had been involved with C2005 before s/he occupied the position she was in at the time of the study. The next section presents how the DoE officials ranked their duties including their responsibility over the implementation of OBE driven C2005.

6.5.3 **Officials' three main responsibilities**

The DoE officials were asked to write down three functions that they rated highest among their list of responsibilities. The question (in the context of the stated position of the official) was asked to establish whether the respondents understood and took C2005 to be among their main responsibilities. Table 6.6 presents the responses.

Table 6.6 Three duties that the DoE officials considered to be their main responsibilities

Department of education	
FSDoE officials that have participated in the national designs of C2005	Free State Department of Education official
1.a.Managing curriculum implementation b. Managing (NCS) C2005 implementation from ECD to grade 9 c. Coordinating curriculum development issues at school level	3.a.Specalist interpreter of education policy b. Interprets methodology c. Interprets assessment
2.a. Providing framework for quality assurance at GET b. Provide systemic evaluation framework for (NCS) C2005 c. Developing instruments to measure the health of the education system	

The lists in Table 6.6 indicate that officials 1 and 2 of the FSDoE included dealing with C2005 among their main responsibilities. It can be inferred that they are close to the process of translating C2005 guidelines to school programmes in which instructional leaders are involved.

6.5.4 **Officials' responses to the four main research questions**

The analysis of officials' responses was framed in the same order as the research questions - instructional leadership (1), curriculum development (2) and quality assurance (3) (see section 6.1). The fourth question (4) asked what assessment respondents made of the existing quality assurance structures and what suggestions they could make for an alternative quality assurance framework.

The wording of the questions required instructional leaders to reflect on the whole process of receiving C2005 guidelines, the context, inputs, process and outcomes of the work of instructional leaders at school level (see Appendix E and Ei - Eiv). The researcher has reduced and recorded

summarised statements that were said by at least more than one respondent directly to the research questions in the tables (see Tables 6.7, 6.8, 6.9 for officials, 6.13 for principals, 6.16 for HoDs and 6.18 for teachers). The rest of the statements from all respondents are included in the appendices (see Appendix F).

Note that for ease of reference respondents are just referred to in their occupation and a code number in the order in which they were interviewed and recorded. In this regard officials have numbers from 1 to 3. Principals assume numbers 4 to 8, HoDs 9 to13 and teachers 14 to 23. This is the order in which respondent numbers are recorded in Appendix F. It is noted that the sections context, processes of implementation and evaluation are sub themes that were created in the course of the study. So the responses do not all equally address the organising themes.

Moreover, for very persuasive reasons, three issues; HIV/AIDS, Multiculturalism and the school as a Learning Organisation, have been included in the theme of quality assurance.

Bot (2005:1, 8) has recorded how 12% of all 350, 000 teachers in SA are carriers of the HIV virus that is assumed to cause AIDS and death. By 2005, 4000 teachers died of diseases related to HIV. These numbers influence teachers supply, attendance and call for resources and time to be directed to care for teachers who carry the HIV virus. This difficulty directly affects quality of education (see section 4.13.1.1).

Meir and Lemmer (2001:332) among others also argued that after opening all schools to all races in 1994, Multiculturalism has to be taught in all training institutions in SA, because perceptions of quality among teachers are determined by their cultural values (see section 4.14.1).

Finally Moloi (2002:6-20) has also made a strong argument that for a school to change successfully and positively it has to work to become a learning school.

Table 6.7 Responses of official 1 to the four main research questions

Official 1 **Instructional Leadership**	Principals, HoDs and teachers are still lacking in knowledge to implement C2005 effectively from day to day. Principals have little knowledge to assist teachers. HoDs also need training. Training should concentrate on interpretation. Learning facilitators are too few and have been allocated too many schools. Their tasks are too many, so they cannot train effectively and follow their training up. We are aware that the DoE may not have all the money demanded to improve teaching and learning.
Curriculum Development Of C2005	Resources including Learning Facilitators are few, have given generic training. Teachers need to learn how to interpret C2005 well. They need to learn about assessment in C2005. Teachers need to aim at mastery of C2005. Teachers need to change; they need to have enthusiasm to know how to change.
Quality Assurance Perspective	Universities should be contracted to come with expertise and the section responsible for quality assurance should do its work. Even though our QA should have a local flair, International quality assurance bodies should be taken on board for comparison
Suggested improvements and alternative quality assurance framework	Schools may be doing something about restoring the culture of learning but more needs to be done - this needs to be developed to a culture. There is a policy on multiculturalism, values and HIV/AIDS. AIDS is also dealt with under Tirisano.

Table 6.8 Responses of official 2 to the four main research questions

Official 2 **Instructional Leadership**	In terms of instructional leadership, principals have not been trained. Learning facilitators are too few and spread over an area that is too big. Teachers have little training. Big classes frustrate implementation. Sometimes Learning Support Materials are late to schools and are of poor quality.
Curriculum Development Of C2005	Curriculum 2005 has been rushed. LSMs are often late. While NCS is good quality it needs more work to make it teacher friendly. Teachers haven't been brought into discussions about C2005.
Quality Assurance Perspective	Quality assurance is dealt with by the Directorate: Quality Assurance. It is hoped that they are doing their work with IQMS and WSE.
Suggested improvements and alternative quality assurance framework	The DoE has to motivate teachers and excite them. The DoE has to allocate more money for more personnel and resources. There is a policy on Multiculturalism, values and HIV/AIDS. AIDS is also dealt with under Tirisano.

Table 6.9 Responses of official 3 to the four main research questions

Official 3 Instructional Leadership	Principals and teachers find it hard to change and make a paradigm shift. They teach as they were taught in the past system. Learning Facilitators try to link up with developments in schools, but are stretched. There are transformation problems that arise from continuous changes. The changes need consensus for measurements.
Curriculum Development Of C2005	NCS has more indicators that are intended to solve the problems for principals and teachers. NCS has fewer outcomes but they need to be understood. There are transformation problems that arise from continuous changes.
Quality Assurance Perspective	Quality Assurance is in its own directorate. At the national level they are concerned with policy.
Suggested improvements and alternative quality assurance framework	Evaluation should be given to the national department to streamline and overhaul courses when it is necessary. Culture of teaching and learning has been restored to some extent. There is policy for Multiculturalism and HIV/AIDS; there is also somebody in charge of values in the district.

6.5.4.1 **Officials' responses to the question on instructional leadership**

The question put to the officials was; what ease and difficulties have instructional leaders been faced with in their instructional work at school level? Responses of the FSDoE officials are presented in this sub section. Statements that are presented here are compressed statements that best capture the meanings and understanding that officials give to the instructional leaders' experiences. The statements area supported by direct quotations of what respondents said from Appendix F.

6.5.4.1.1 **Context, input and design**

In terms of the first indicator - context and inputs that enable instructional leaders to function, in his/her responses, official 1 noted that one of the difficulties was that a small amount of money had been allocated to improve

teaching and learning (Table 6.7). Moreover, officials 1 and 2 noted that LFs are few but have been given vast areas to assist. In support of this statement, respondent 1 said, “The ratio of LFs to the number of schools that they have to serve is too big. Their work is too much”. Respondent 2 said, “RNCS was rushed so there was no budget for many of its requirements”. Respondent 1 also said, “Principals and teachers still have misunderstanding of the principles of C2005”.

In other responses, official 2 suggested that principals had not been trained to lead teachers in the implementation of C2005 (see Table 6.8). In regard to training respondent 1 said, “They need training on interpretation”.

6.5.4.1.2 **Process of implementation**

Responses also indicated that teachers have little training; big classes that frustrate implementation of C2005 (see Table 6.8). To support this view respondent 1 said, “They need examples and follow up on how to translate guidelines into outcomes, they also need examples of assessment standards and how to apply them”.

6.5.4.1.3 **Evaluation for outcomes**

In evaluating instructional leadership, official 1 noted instructional leadership difficulty in that; the DoE may not have all the money demanded to improve teaching and learning further, that HoDs need training. Training should concentrate on translation (see Table 6.7). In support of these views, as indicated for the context of instructional leadership, respondent 2 said, “C2005 was rushed…there was no budget for many of its requirements”. The same official further noted the difficulties in LF’s poor training. Finally responses of official 3 indicated that principals and teachers have not made a paradigm change (see Table 6.9). To confirm these difficulties official 1 said, “Training should concentrate on interpretation” and that “FSDoE should also encourage school personnel to accept change wholeheartedly”.

It is observed that respondent 3 is included in the analysis of responses, but almost all his/her responses were very positive about the work of C2005 guidelines designers. For this reason and the fact that the research aimed at especially teasing out difficulties, his/her responses were used sparingly to support responses identifying difficulties.

6.5.4.2 **Officials' responses to the question on Curriculum Development**

6.5.4.2.1 **The context, input and design**

Responses of officials 1 led to the inference that teachers had little understanding and knowledge about C2005 and need to learn how to interpret C2005 well (see Table 6.7). Further, LFs and their generic training have not helped teachers. There were difficulties related to supplies of LSMs - materials were often late to schools and of poor quality (see Table 6.8). Responses of official 3 indicated that NCS has fewer outcomes but they need to be understood. The same official further indicated that there are transformation difficulties that arise from continuous changes. To substantiate these assertions respondent 1 said, "The ratio of LFs to schools is too small…LFs need to do their training work properly". The official further said, "The DoE should make coordination and support constant and shorter courses provided to enable teachers to make sense of changes and change things when there is need".

Besides training on interpretation, respondent 1 noted that teachers need to learn about assessment standards…and aim at mastery of C2005 (see Table 6.7). Respondent 2 confirmed and said, "Teachers don't seem to have a belief in what they are teaching. They have not been brought on board and don't see any goodness in identifying with C2005" Respondent 1 raised some hopes that, "A bigger budget…more LFs… thorough training… LFs can be trusted to be receptive to teachers' problems".

6.5.4.2.2 **Process of implementation**

Responses of officials 1 and 2, and 3 identified problems of curriculum for instructional leaders as continuous changes and teachers that have not learned how to interpret C2005 well (Table 6.8). In support of the assertion respondent 1 said, “Instructional leaders need training in interpretation of C2005 guidelines and lifelong learning”.

6.5.4.2.3 **Evaluation for outcomes**

Responses of officials 1 and 2 indicated that among the difficulties was that teachers were not enthusiastic about C2005. The officials were also convinced that part of the problem is that teachers had not been brought into discussions about C2005. Other difficulties derive from teachers’ misunderstanding of the guidelines and assessment of C2005 at school level and the conditions of implementation. They went on to say that teachers have to aim at mastery of C2005 (see Table 6.7, 6.8). To confirm these difficulties, respondent 1 said, “For quality delivery of C2005, officials employed by the DoE have to give their best”. These responses show that the DoE officials are aware that the problems are related to the small budget that was allocated by the DoE for training (see Table 6.7).

6.5.4.3 **Officials’ responses about quality assurance**

6.5.4.3.1 **Context inputs and design**

To show that there was limited knowledge when C2005 was introduced, official 1 indicated that universities should be contracted to come with expertise and the section responsible for quality assurance should do its work (see Table 6.7). The official further indicated that even though the SA QA should have a local flair, knowledge from international quality assurance bodies should be taken on board for comparison (see Table 6.7). To substantiate the observed difficulty, respondent 1 said, “The whole DoE has to take up research findings from the field and implement them seriously…

systems of quality assurance such as ISO 9000....should give an input so that we can trust that our graduates are world class".

6.5.4.3.2 **The process of implementation**

To highlight another difficulty of fragmentation in the offices of the province; officials 1, 2 and 3 said that quality assurance is dealt with in the Directorate: Quality Assurance. Officials expected the Directorate to deal with IQMS and its agencies, WSE and DAS (see Tables 6.8, 6.9). To confirm the assertions respondent 2 said, "There is a directorate under the director and systemic evaluation for quality assurance". Other issues that have become additional descriptors of quality of the curriculum such as HIV/AIDS, Multiculturalism and whether the school is a learning organisation and the curriculum embraces the concept of culture of a learning organisation (see further explanations of inclusion of HIV/AIDS, Multiculturalism and a learning organisation in section 6.5.4).

6.5.4.3.3 **Evaluation for outcomes**

Officials also saw the issues of HIV/AIDS and Multiculturalism as important issues that are being reflected in the school as part of quality education (see Tables 6.7, 6.8). Respondent 1 indicated that, "There is information that is already disseminated under the guidance of a government programme called Tirisano".

6.5.4.4 **Suggested improvements and a quality assurance framework**

Official 2 suggested that the DoE must allocate more money for personnel and resources. Official 1 indicated that quality assurance in SA must have an international component to facilitate comparison. Official 3 suggested that evaluation should be given to the NDoE to streamline and overhaul courses when necessary. Official 2 claimed that the culture of teaching and learning has been restored but that more needs to be done. Official 1 said, "School level measures of quality assurance should learn from those of

university Quality Assurance.....we want to be competent and compare with the wider world so that systems of Quality Management such as the ISO 9000 are helpful and should give an input in quality culture - so that we graduate people whom we would trust and are world class, high quality performers".

6.5.5 **Details of Principals, HoDs and Teachers**

Biographical details of principals are presented in Table 6.11. Responses of principals to leadership and curriculum specifics are transcribed in Appendix F. What are presented in Table 6.10 are details of principals, HoDs and teachers, districts, and locations of schools.

Table: 6.10 Principals, HoDs and teachers arranged by district and location of work (for quality control)

List of Schools in numerical code order, district and the number of participants	
Motheo	**Thabo Mofutsanyana**
School N 1 H.S Bloemfontein. 1principal, 1 HoD, 1 teacher **Total: 3**.	School N8 H.S. Clocolan. 1HoD, 2 Teachers **Total: 3**
School N2 H.S. Bloemfontein 1 principal, 1 HoD, 1 teacher **Total: 3**	School N9 S.S. Ficksburg 1HoD, 2 Teachers **Total: 3.**
School N3 H.S. Botshabelo 1 HoD, 1 Teacher **Total: 2**	
School N4 H.S. Thaba Nchu. 1principal **Total: 1**.	
School N5 S.S. Tweespruit 1 Principal, 1 HoD. **Total: 2**.	
School N6 H.S Ladybrand. 1 Teacher **Total: 1.**	
School N7 H.S. Ladybrand. 1principal, 1 HoD **Total: 2**	**Grant Total of Interviewees: 20**

Table 6.10 shows the distribution of the sample and the location of the sample population. The sample was drawn from the locations that are given

in the Table 6.10, which all fall into Motheo district of the Free State. The distribution of participants will be divided into groups as stated initially, in the order of seniority. First are principals, then HoDs and then teachers.

6.5.6 **Biographical details of the principals**

The principals were given the codes 4, 5, 6, 7 up to 8. The biographical details of the group are presented in Table 6.11.

Table 6.11 Biographical details of school principals

Code numbers	Gender and age	Qualifications	Experience/Number of years served in the present position
4	M 50+	Academic and Professional: BA Ed and Cert. School Management	25 years
5	M 50+	Academic: BA Professional: Higher Ed Diploma	25 years
6	M 41-45	Academic and Professional: BA Ed and PGDE	5 years
7	M 50+	Academic and Professional: M Ed and OBE Cert	15 years
8	M 41-45	Academic: BA Hons Professional: Higher Ed Diploma	13 years

Table 6.11 shows that all principals of the selected sample schools who were interviewed are male and all have a junior degree and a certificate. One principal has an M.Ed. What could be read into the qualifications and experience is that all principals that were interviewed have at least a junior degree qualification. The majority have more than 10 years of practice

while two have more than 20 years. Their views on the difficulties carry the weight of the qualifications and experience.

6.5.7 **Principals' three main responsibilities**

Principals were asked to list the duties that they considered to be at the top of their priority list of functions. The purpose was to find out whether the leaders considered implementing C2005 well, to be among their priorities. Table 6.12 indicates where C2005 falls in the principals' priorities.

Table 6.12 Three duties that the principals considered to be their main responsibilities

Principal by code	Responsibilities
Code numbers 4	a. Monitoring teachers work in school b. Monitoring Teaching and learning in the classroom c. Assisting with in-service training and workshops for teachers
5	a. Train staff in OBE b. Train and facilitate implementation of OBE c. Improve competence of teachers, motivate them and protect them
6	a. Leadership - guiding staff to work to achieve school goals b. Management of human resources for curriculum implementation c. Financial manager of the school
7	a. Financial manager of school finances b. Instructional Leader of other staff c. Administrator of government regulation
8	a. Time tabling, manage time for implementation of curriculum b. Monitor the work of teachers and learners c.Procure all resources that are needed for curriculum implementation

In order to avoid confusion in referring to principals, the format adopted is: respondent 4, 5, 6, 7 or 8 followed by (principal). Only respondent 5 (principal) mentioned OBE in his two top functions. This principal said, "My first three duties are training teachers to prepare them to implement OBE"

(respondent 5 (principal) & Table 6.12). All principals included training, monitoring and human resource responsibilities.

6.5.8 **Analysis of principals' responses to the four main research questions**

The responses given by principals who were interviewed are presented in Table 6.13. This table contains responses that captured the meanings that principals give to their experiences. These statements are arrived at through a phenomenological and thematic process of bracketing and reducing statements to the very bare meanings of experiences of respondents. As in other analyses, the indicators; context, inputs, processes and outcomes of instructional leadership, curriculum development and quality assurance functions were taken into consideration when the statements were written.

Table 6.13 Thematic analysis of principals' responses

Themes	Responses	Frequencies	Percentage	Totals
Instructional Leadership	Inadequate training.	5 out of 5	100%	5
	Too many and quick changes.	3 out of 5	60%	5
	"top down" implementation, lack of collaboration.	4 out of 5	80%	5
	Misunderstanding of C2005 guidelines.	2 out of 5	40%	5
	Teachers have not seen a model of a good lesson.	3 out of 5	60%	5
	Too much OBE administrative work.	3 out of 5	60%	5
	Big classes.	2 out of 5	40%	5
Curriculum Development	C2005 Designers failed to take classroom challenges into account.	4 out of 5	80%	5
	Non consultation did not allow teachers to buy into C2005.	2 out of 5	40%	5
	Guidelines are difficult, not clear.	4 out of 5	80%	5
	Too many and quick changes.	2 out of 5	40%	5
	Limited resources and LSM.	2 out of 5	40%	5
Quality Assurance perspective	IQMS has brought more work for instructional Leaders.	2 out of 5	40%	5
	LFs do not master C2005.	3 out of 5	60%	5
	Prevalence of "top down" culture.	4 out of 5	80%	5
	Not demonstrable quality indicators.	2 out of 5	40%	5
Suggested improvements and a quality assurance framework	Longer time of training of trainers and teachers.	3 out of 5	60%	5
	Collaboration, demonstration of quality teaching.	3 out of 5	60%	5

The frequency figures in Table 6.13 are not intended to give the impression that this study is a quantitative study. The study is qualitative to the extent that even those statements that were mentioned by only a few principals and teachers are important because they represent important feelings, understanding and a narrative of experiences. These sentiments condition leadership styles and determine how well C2005 is implemented. It has to be stated principals mention teachers several times because their work is to facilitate teachers' work.

6.5.8.1 **Principals' responses to the question on instructional leadership**

6.5.8.1.1 **The context, inputs and design**

While principals acknowledge that the DoE has provided an appropriate framework for change and implementation of C2005, four out of five (80%) of the principals also pointed that there is a difficulty with the "top down" non collaborative approach to implementation of C2005. This difficulty could be a possible source of other difficulties (Table 6.13). To confirm this difficulty, respondent 6 said, "I don't think there is enough grassroots level collaboration or working together between teachers, the school and the FSDoE". All principals (respondents 4 to 8) complained about inadequate training. Sixty percent of principals said that C2005 has had many quick changes. Two out of five (40%) principals mentioned big classes (see Table 6.13). Respondent 7 said, "Training is done poorly by trainers who may not know much either". Respondent 4 (principal) said, "There was a rush to introduce changes" (see Appendix F for all direct quotations).

6.5.8.1.2 **The process of implementation**

In terms of the process of principals' instructional leadership, forty percent (40%) of the principals said that the difficulty that they can see about teachers is that they misunderstand C2005 guidelines. Forty percent (40%) of the principals pointed at the difficulty of big classes while sixty percent (60%) indicated that teachers have not seen a model of a good lesson in C2005 (see Table 6.13). Respondent 7 said, "I have problems…teachers' trainers are not sufficiently trained themselves". Respondent 8 (principal) said; "The principals have failed to persuade LFs to demonstrate a perfect lesson in C2005". Respondent 5 (principal) said; "Teachers face many learners in the classroom. They can hardly fulfil the specific needs in programming" (see Appendix F for direct quotations).

6.5.8.1.3 **Evaluation for outcomes**

Three out of five (60%) principals noted that some requirements of OBE add too much administrative paperwork onto teachers' workload (see Table 6.13). To confirm this respondent 5 (principal) for example said; "Too much elaboration on administrative work takes away the teacher's time from teaching to other areas". All interviewed principals noted that there was inadequate training (see Table 6.13). Respondent 5 (principal) confirmed this, saying, "Whenever I come from training, I am more confused. Training is inadequate and is done by people who do not know more either…. training also put too much emphasis on assessment".

6.5.8.2 **Principals' responses to the question of Curriculum Development**

6.5.8.2.1 **The context, input and design**

Among the difficulties that principals mentioned in relation to the context of curriculum design and inputs is that principals saw non collaborative culture of implementing decisions by the DoE as alienating (see Table 6.13). Respondent 4 (principal) captured the views of 80% of principals, expressing disappointment that, "consultation would have allowed teachers to buy into C2005 and co-own it" (see Appendix F). Eighty percent (80%) of principals also indicated that C2005 designers failed to take classroom experiences into account (see Table 6.13). To confirm this, respondent 4 said, "The training also takes the form of impositions of unclear new things. Forty percent (40%) blamed limited resources. To support this claim, respondent 6 said, "Rapid changes make most materials such as textbooks obsolete".

6.5.8.2.2 **The process of implementation**

Four out of five (80%) principals complained of the difficulties of too many and quick changes (see Table 6.13). Besides this difficulty, 40% of

principals said that C2005 has unclear guidelines. To confirm these statements, respondent 7 said, “There is a clear disadvantage in the rush in the implementation of the NCS… and training sessions have been too short at 3-5 days…..3-6 months would be more adequate”.

6.5.8.2.3 **Evaluation for outcomes**

In this regard, difficulties such as unclear C2005 guidelines, limited resources and lack of collaboration in designing C2005 could be considered with the figures 40%, 40% and 80% respectively. It is noted that these difficulties also apply, to differing extent to context and implementation (see Table 6.13). In regard to training respondent 4 said, “Three to six months training would be more adequate”. Respondent recognises resource limitations saying, “We in the school may benefit from private non – governmental groups and people”. Respondent 4 again says, “Consultation would have allowed teachers to buy into the programme and co own it”.

6.5.8.3 **Analysis of principals’ responses to the question on quality assurance**

6.5.8.3.1 **The context, inputs and design**

Four out of five (80%) principals complained that the DoE are rather implementing C2005 form the “top down”. In support of this assertion, respondent 6 said, “IQMS has a very unwieldy bureaucracy”. Respondent 4 also said, “Quality Assurance personnel of the DoE come to school and go without understanding the difficulty of the work ……..”

Further, five out of five principals (100%) said they had limited training to implement IQMS. In addition there are quality assurance structures of the IQMS that principals have to implement without sufficient training. In this regard, respondent 4 (principal) said, “As a consequence of the limited knowledge of C2005 and IQMS, principals are not even able to make the quality assurance work through teachers”. In addition respondent 6 said,

“This situation could improve if the DoE listened to…..and tried to create a culture of participation/collaboration”

Three out of five (60%) principals also mentioned how they had no confidence in their mastery of OBE driven C2005, its underlying theoretical guidelines and appropriate implementation (see Table 6.13). In support of the position respondent 6 said, “C2005 and its successive versions are too experimental and lack what I see as standard. It is open to too many changes… quality outcomes can only be attained through addressing all collaborative issues mentioned”.

6.5.8.3.2 **The process of implementation**

Two out of five (40%) principals said that, there had not been a demonstration of the best lesson in C2005 that would give guidance to principals and teachers and set quality levels to be achieved by all instructional leaders as a quality measure (see Table 6.13). Contrary to a smooth implementation, respondent 6 said insufficient emphasis is being put on problems found in school, and an indication of what solutions are being planned”.

6.5.8.3.3 **Evaluation for outcomes**

All respondents in this category (40%) said that IQMS and its agencies have created a lot of work”. Respondent 8 said, “…….IQMS and its agencies only make schools aware of what they have to achieve, but there are too many challenges”. Another 60% of principals said that they realised that LFs do not master C2005 (see Table 6.13). This position was also substantiated by respondent 4 saying, “The QA personnel… don’t understand the difficulties of teachers”.

6.5.8.4 **Suggestions for an alternative quality assurance framework**

Three out of five (60%) principals proposed that there should be a longer time of training of trainers and teachers. Another 60% said that there should be collaboration and demonstration of quality teaching (see Table 6.13). To support the suggestion, respondent 4 said, “The DoE should listen to teachers and create a culture of participation. Respondent 6 affirmed, “Changes and improvements will come with addressing all collaborative issues that s/he mentioned”.

6.5.9 **Biographical details of the HoDs**

The details of the third group of stakeholders to be interviewed, the HoDs, are presented in Table 6.14.

Table 6.14 Biographical details of HoDs

Gender, age and qualifications of school level personnel code numbers 9 to 13 refer to HoDs			
Code	**Gender and Age**	**Qualifications**	**Experience**
9	M 50+	Academic and Professional: **M Sc, PGDE**	6yrs as HoD
10	F 36-4	Academic and Professional: **M Com Higher education Diploma**	16 years as HoD
11	M 50+	Academic: **BA** Professional**: Higher Edu. Diploma**	10 years as HoD
12	M 41-45	Academic: **B Tech** Professional**: Certificate for OBE teaching**	6 years as HoD
13	M 50+	Academic and Professional**: Higher Primary Diploma**	5 years as HoD

The importance of the details in Table 6.14 is that they show whether HoDs academic qualifications give confidence that they would lead instructional leadership of C2005 competently. Details were also to determine how much experience they have in teaching.

Four out of five (80%) HoDs have at least a first degree. Two have higher qualifications, namely, M Sc and M Com. Table 6.15 presents the duties that HoDs consider to be their main responsibilities.

Table 6.15 Three duties that the HoDs considered to be their main responsibilities

	Responsibilities
1	Assist the principal
2	Motivate, organise and support development of teachers and learners
3	teaching and administration thereof

Table 6.15 indicates that the perceptions of HoDs are that they understand their role to fit between that of the principal and teachers (see Table 6.15). Yet HoDs and teachers have been given similar and inadequate training (see respondents 9 and 13 (HoDs), Appendix F). The next sub section looks at HoDs responses to other questions.

6.5.10 **Analysis of HoDs' responses to the four main questions**

Besides the demographic (population dynamics) details of HoDs and their responses to the questions in the interview schedules, the bracketing technique that has been used as part of phenomenological method helps the research to capture the meanings that teachers give to their experiences and difficulties.

Responses of the HoDs were also analysed under the four areas and themes that tally with the main research questions and the results are presented in the table below (see Tables 6.16). HoDs were also referred to as respondents 9,10,11,12 and 13 followed by the word (HoD). In accordance with phenomenological tradition, several responses were grouped together to get the meaning that the HoDs give to their experiences and difficulties**.** Individual responses were considered separately. Finally several statements were sorted into themes on the experiences of HoDs' practice.

Table 6.16 Thematic analysis of HoDs' responses

Themes	Responses	Frequency	Percentage	Total
Instructional Leadership	Inadequate training.	4 out of 5	80%	5
	No Consultation or collaboration between the DoE and teachers.	2 out of 5	40%	5
	Teachers' loss of authority in C2005.	2 out of 5	40%	5
	Misunderstanding the principles of C2005.	I out of 5	20%	5
	Too much administrative work in C2005.	2 out of 5	40%	5
	LFs are not well trained, consequently they train teachers poorly.	3 out of 5	60%	5
Curriculum Development	Designers not taking teachers' class experiences.	3 out of 5	60%	5
	Training is generic and not subject specific.	4 out of 5	80%	5
	Training does not emphasise assessment.	3 out of 5	60%	5
	Small education budget leads to poor training inadequate LSMs and poorly trained LFs.	2 out of 5	40%	5
	C2005 guidelines restrict teachers' initiative.	2 out of 5	40%	5
	C2005 is complex, its values difficult to implement.	2 out of 5	40%	5
	C2005 has many interpretations.	2 out of 5	40%	5
Quality Assurance perspective	C2005 has added too much administrative paperwork for teachers.	2 out of 5	40%	5
	C2005 allows non participation, in group work.	2out of 5	40%	5
	LFs have to be very knowledgeable to train teachers sufficiently.	3 out of 5	60%	5
	Schools and staff have to deal with the problem of H impact at school level.	2 out of 5	60%	5
Suggestions fo improvement o quality assuran and an alternat framework	Collaboration is needed between all stake holders.	2 out of 5	40%	5
	Change of culture to that of OBE.	2 out of 5	40%	5
	Have knowledgeable trainers.	2 out of 5	40%	5
	Obtain a bigger budget.	2 out of 5	40%	5

It is noted that the actions of instructional leaders in the organising sub themes of context, implementation and evaluation sometimes overlap so that instructional leaders' statements are repeated on occasion because they apply to two or more sub themes. An attempt has been made not to repeat, but it has been inevitable in some cases to repeat so as to present a full picture.

6.5.10.1 **HoDs' responses to the question on instructional leadership**

6.5.10.1.1 **The context, input and design**

Eighty percent (80%) of the responses of HoDs indicated that one of the difficulties is that C2005 is being implemented in the context of LFs that are not well trained (see Table 6.16). To confirm this position respondent 12 (HoD) said, "LFs need training so that they do not come to monitor only…. they also show how to do the work in class". Another problem that was mentioned most by 40% of HoDs was that C2005 designers do not consult school personnel about classroom challenges are s to the teachers (see Table 6.16). As a consequence C2005 guidelines do not capture the classroom conditions of teachers. Respondent 10 (HoD) said," In terms of relevance and sufficiency I have the training sessions are inadequate". Respondent 12 was more direct saying, "Designers of C2005 should take teachers' experience on board when they design C2005".

6.5.10.1.2 **The process of implementation**

HoDs complained that C2005 classroom conditions are more complicated. It implies that design teams do not take into account when they design C2005. Respondent 9 said, "C2005 designers have to take teachers' subject specific concerns into account, and these include assessment standards". (see Tables 6.16 & 6.18). HoDs said C2005 adds a lot of administrative work (see Tables 6.16). HoDs also said that LFs are not well trained, consequently they train poorly. At the time of writing, training had been generic and not helpful in implementing C2005. Two out of five (40%) HoDs found the principles of C2005 difficult, while the regulations of C2005 result in a lot of administrative work for all instructional leaders. Respondent 11 said that, "There is too much paper work in OBE".

6.5.10.1.3 **Evaluation for outcomes**

In evaluating the facilities created to implement C2005, eighty percent of HoDs (80%) mentioned inadequate training (see Table 6.16). Two out of five (40%) of the HoDs said that the DoE did not consult them. Three out of five (60%) HoDs said that LFs do not master the ways of C2005 themselves (see Table 6.16). Lastly two out of five (40%) HoDs mentioned too much administrative workload that is added to the already existing work of all school personnel (Table 6.16). To confirm the difficulties respondent 9 said, "But training has not been completed". Respondent 12 said, "Designers should take teachers' experience on board when they design C2005". Respondent 11 said, "Besides LFs I think knowledgeable lecturers could also help bringing knowledge to school". The same respondent further said, "Teachers find and report that there is too much paper and administrative work in OBE".

6.5.10.2 **Analysis of HoDs' responses to the question on Curriculum Development**

6.5.10.2.1 **The context, input and design**

Concerning Curriculum Development, 4 out of 5 (80%) HoDs indicated that the training that they had been given was generic. The emphasis in it was to explain the OBE logic, the white paper regarding paradigm change. HoD 10 said, "Training has given us generic skills and explanations of, for example, the white and green papers and not what learners need in class".

Three out of five HoDs (60%) blame the DoE for allocating a small amount of money for education transformation. Consequently a small amount of money was allocated to schools (see Table 6.16). HoDs relate the difficulties of inadequate training to the small number of LFs. Respondent 13 (HoD) said, "owing to limited resources HoDs'…….training sessions were too short". Respondent 12 (HoD) said, "LFs need training so that they

do not only come to monitor, but to also demonstrate how to deliver C2005 in class".

6.5.10.2.2 **The process of implementation**

Two out of five HoDs (40%) said that difficulties arise out of the different aspects of C2005. One aspect is the complexity of the concepts and practice of C2005. There are also many restrictions to…… initiatives in C2005 guidelines……..functions have been prescribed to the extent that instructional leaders may not choose how to schedule, pace, deliver and assess lessons (see Table 6.16). Respondent 11 (HoD) said that, "I find that...OBE is complex … some teachers are even considering leaving". Respondent 13 (HoD) said that, "Teachers do not have flexibility to design lessons, as LFs would not approve".

6.5.10.2.3 **Evaluation for outcomes**

Respondent 12 (HoD) remarked that, "a common view among teachers is that interpretations of C2005 are many, making it complex". Respondent 13 (HoD) added that "lesson schedules are determined by C2005 guidelines. Teachers do not have much flexibility to design lessons. LFs would not approve programmes that they think deviate form guidelines".

6.5.10.3 **Analysis of HoDs' responses to the question of quality assurance**

6.5.10.3.1 **The context of quality assurance**

According to 60% of respondents, indicated that LFs have to be knowledgeable to train teachers sufficiently. By implication this has not been the case (see Table 6.16). Respondent 9 (HoD) said that, "There have to be….highly knowledgeable trainers to give the IQMS value in the eyes of teachers".

6.5.10.3.2 **The process of implementation**

Forty percent 40% of the HoDs also noted that there was a big increase in the administrative paperwork (see Table 6.16). To support the view, respondent 13 said,"OBE has brought more work…"

6.5.10.3.3 **Evaluation for outcomes**

Forty percent (40%) of HoDs noted that C2005 allows non participation in group work. This means that some learners can go through tasks without participating, yet they could still share marks of those who have been working. To confirm the difficulty, respondent 9 said," About learners – they do not take responsibility for their learning at lower grades…. They take some….at grades 10 – 12". The other issues of quality in C2005 that HoDs gave opinion on were; that their schools have HIV/AIDS programmes that were not supported by a formal policy; however robust programmes had been established to address as a public responsibility of multiculturalism and HIV/AIDS. To the question of whether they regarded their school as a learning organisation and that the school would be well placed to effect changes; HoDs gave a unanimous response that, in spite of initial difficulties of discussing the topics HIV/AIDS and multiculturalism, a positive trend had developed. They also saw their schools as learning organisations.

6.5.10.4 **Suggestions for improvement and an alternative framework**

Two out of five (40%) of the HoDs' responses suggested that collaboration is needed between all stakeholders in C2005. Forty percent (40%) of HoDs also said there should be a change of culture to OBE. There should be knowledgeable trainers.

6.5.11 **Biographical details of teachers**

The last group of instructional leaders, teachers, were interviewed and asked to describe the ease and difficulties they experience in translating

and implementing C2005 guidelines. Their responses appear below in Tables 6.17, 6.18, 6.19.

Table 6.17 Biographical details of teachers; code numbers 14 to 23

14	M	36-40	Academic a Professional: B Ed	5 months teaching
15	F	50+	Academic and Professional: **Higher Primary Diploma**	11years
16	F	41- 45	Academic and Professional: **BA Ed**	8years
17	M	31-35	Academic and Professional: **Matric Advanced Certificate in Education**	4 months
18	M	31-35	Academic and Professional **Qualification: Matric Teaching Diploma**	3 years
19	F	31-35	Academic and Professional: **Matric and Senior Teaching Diploma**	10 years
20	M	41-45	Academic and Professional : **BA Ed.**	13 years
21	F	36-40	Academic and Professional: **B.Tech, Ed** Management **SPTD**	4 years
22	M	36-40	Academic and Professional qualifications: **B Ed, PGDE**	13years
23	F	31-35	Academic: **Matric** Professional:	10years

Table 6.17 shows that Five (5) teachers have junior degrees while 5 have certificates only. It is noted however that all teachers/ interviewees except number 23, have professional teaching qualifications. The next section

combines their responses to questions of the ease and difficulties of translating C2005 guidelines to classroom programmes. It is worth noting further that respondent 23 (teacher) has a Matric certificate only, does not have a professional teaching qualification, but has served for ten years as a teacher.

6.5.12 **Analysis of teachers' responses to the four main research questions**

Several responses were grouped together to get the meaning that the teachers give to their experiences and difficulties**.** Individual responses were considered separately. Finally several statements were sorted into themes on the experiences of teachers' practice. These are presented in this section, Tables 6.18 and 6.19.

Table 6.18 Thematic analysis of teachers' responses

Theme	Statements of teachers	Frequency	%	Total
Instructional Leadership	Training in the guidelines of RNCS was inadequate.	2 out of 10	20%	10
	The guidelines are short and leave teachers with much time to fill the gap.	5 out of 10	50%	10
	C2005 guidelines have been presented in English and generic concepts that teachers do not understand.	6 out of 10	60%	10
	Assessment standards are not easy to set and administer correctly.	6 out of 10	60%	10
	In a year one could implement only one standard.	6 out of 10	60%	10
	C2005 implementation was hurried.	6 out of 10	60%	10
Curriculum Development	LFs are not conversant/do not master the information they deliver on RNCS. LFs relay on manuals.	7 out of 10	70%	10
	It is difficult to move from one educational level of the phases to another.	4 out of 10	40%	10
	C2005 terminology and CTAs are presented in difficult English language and technical concepts.	5 out of 10	50%	10
	Training emphasised implementation in RNCS.	3 out of 10	30%	10
	The administrative load of OBE is too much, especially filing and typing.	6 out of 10	60%	10
	Teachers do not master structuring lessons.	5 out of 10	50%	10
Quality Assurance Perspective	IQMS training has not been adequate.	5 out of 10	50%	10
	It has not helped to develop teachers' capacity to implement C2005 generally.	5 out of 10	50%	10
	The source of many difficulties is the hurried implementation of C2005.	6 out of 10	60%	10
	The school is a learning organisation; we train on a continuous basis.	8 out of 10	80%	10
	It has continuing HIV/AIDS programme to disseminate information. The school is sensitive to all cultures.	8 out of 10 6 out of 10	80% 60%	10 10
Suggestions for an alternative framework	Classes are too big; teachers are unable to reach all learners.	6 out of 10	60%	10
	Assessment standards and expectations about what can be achieved are not realistic.	4 put of 10	40%	10
	IQMS does not help teachers on classroom issues.	5 out of 10	50%	10

The frequency figures were analysed in terms of thick descriptive statements in Table 6.19. The last two topic issues, quality assurance and suggestions were brought together because the problems mentioned about quality assurance perspective are also suggestions for an alternative quality assurance framework.

Tables 6.18 and 6.19 present the distribution of teachers' responses to interview questions and what they state as their difficulties. The tables reflect issues that teachers think are the difficulties, sources of difficulties and suggestions of what could be done to address the difficulties.

6.5.12.1 **Teachers' responses to the question on instructional leadership**

6.5.12.1.1 **The context, input and design**

In terms of the context of classroom scheduling, pacing, delivery and reporting assessment indicated, twenty percent (20%) of the teachers noted the difficulty that training on the guidelines of RNCS was inadequate. Sixty percent noted that implementation of C2005 had been hurried too much. Moreover another sixty percent noted that guidelines had been presented in English and generic concepts that teachers don't understand (see Table 6.19). To confirm the difficulties, respondent 14 said, "LFs who were sent to our area were not conversant with C2005". Respondent 17 added that, "Training sessions have been generic and emphasised work schedules and assessment". Respondent 17 further stated that, "OBE…was rushed and is hard for teachers" (see Table 6.18). Respondent 19 further noted that, "the language that is usually used is English and is hard".

6.5.12.1.2 **The process of implementation**

In this regard fifty percent (50%) of teachers noted the difficulty of short guidelines that leave teachers with much time to fill the gap. Moreover twenty percent (20%) noted that, training in C2005 guidelines was inadequate. Sixty percent (60%) noted that one can only implement one standard a year, while sixty percent (60%) of the teachers also noted that the administrative load on teachers is too much (see Table 6.18).

To confirm these difficulties, Respondent 20 noted that, “Trainers are not competent; they are also struggling with guidelines”. Respondent 14 noted, “Teachers have difficulties with the fact that C2005 has been presented in the English language, which trainers, teachers and learners do not understand well”. Respondent 16, said that,” Teachers feel overloaded and have very little time even for our families. This makes us lose commitment to teaching”. In terms of assessment standards’ difficulty, respondent 19 pointed out that CTAs are hard”. Respondent 22 added that, “quality is lost when teachers struggle with assessment because assessment is also quality assurance”.

6.5.12.1.3 **Evaluation for outcomes**

In this regard, two out of ten teachers (20%) said that C2005 guidelines are short and leave teachers in need of something to fill the gap at the end of a lesson. Sixty percent (60%) of the teachers noted that implementation of C2005 was hurried. Another sixty percent (60%) noted that assessment standards are not easy to set and administer correctly – in a year one could implement only one standard (see Table 6.18). Respondent 17 recognised the difficulty of rushing C2005 noting, “The general feeling of all staff about OBE is that… it has been rushed in implementation and is hard for teachers”. In regard to problems in class respondent 19 noted the difficulty that, “It is easy to participate in workshops and role play on delivering C2005 lessons, but in class it is difficult”. Respondent 14 used the precise words indicating, “Assessment standards are not easy to set up and administer correctly. Moreover the administrative load of OBE is too much, especially typing and filing”. Respondent 19 said that, “C2005 /OBE changes too much too quickly, and confuses us”.

6.5.12.2 **Teachers' responses to the question on Curriculum Development**

6.5.12.2.1 **Context, input and design**

Five out of ten teachers (50%) indicated that, C2005 terminology and CTAs present difficulties of English language and technical concepts. Seventy percent (70%) of teachers indicated that LFs are not conversant/do not master the information they deliver on RNCS. LFs rely on manuals (see Table 6.18). To confirm the observations of the difficulties, respondent 19 said, "Guidelines are also difficult, they are general, not explained well. They explain things that are far from what is done in the classroom". Respondent 14 added, "Training has not been sufficient in most cases". Respondent 21 also substantiated that, "LFs are expected to be knowledgeable and responsible for implementation of C2005 guidelines, but these do not show expertise, they only emphasise implementation of policies".

6.5.12.2.2 **The process of implementation**

Thirty percent (30%) of teachers noted that the difficulty was that training emphasised implementation of RNCS. Sixty percent (60%) noted that the administrative load of OBE is too much, especially filing and typing. Another forty percent (40%) mentioned the difficulties that they experience when they move from one educational level of the phases to another. Fifty percent (50%) indicated that teachers do not master structuring lessons (see Table 6.18).

To support the observations about the difficulties, respondent 14 said, "Training was not sufficient", and further expressed in the same words in the table 6.18 that, "Training emphasised implementation of RNCS". Respondent 20 added that, "Teacher training sessions fail to give new OBE value to teachers". Respondent 16 concluded that, "Teachers feel overloaded and have very little time for even their own families/children -

and have lost commitment". To confirm the difficulty of movement of teachers, respondent 14 said, "In other cases teachers move back and forth in levels of classes and learning areas and this causes confusion". Respondent 19 completed the observations saying that, "OBE changes too much… and confuses us, I am not sure of how I can master the curriculum…implementing requirements of C2005 principles is very difficult. The requirements are too many".

6.5.12.2.3 **Evaluation for outcomes**

Although they were mentioned in relation to the difficulties of implementation, heavy administrative load and the difficulty of teachers' movement from one level to another apply to this level as well with their respective frequencies of 60% and 50% (see Table 6.18). Respondents 16 and 14 confirm these difficulties as concerns of evaluating Curriculum Development.

6.5.12.3 **Quality assurance perspective on teachers' instructional leadership**

6.5.12.3.1 **Context input and design**

Five out of ten teachers (50%) highlighted the difficulty that IQMS training has not been adequate. Further, they said IQMS has not helped to develop teachers' capacity to implement C2005 generally (see Table 6.18).

To support the assertion about the difficulty, respondent 21 said that, "Some teachers still don't understand that we are implementing IQMS". Respondent 14 highlighted further confusion, saying," "LFs want personal development plans even when teachers have not had enough time and training".

6.5.12.3.2 **Process of implementation**

Six out of ten (60%) teachers noted that the source of many difficulties was the hurried implementation of C2005 generally.

Respondent 20 stated, “The process of quality assurance is not working well, we indicated where we want development.....until now we have not had anything….further rapid changes are confusing teachers”.

6.5.12.3.3 **Evaluation for outcomes**

Five out of ten teachers (50%) noted that the difficulty about IQMS was that the training that teachers got was inadequate. It has not helped to develop teachers’ capacity to implement C2005 generally (see Table 6.18).

Confirming the difficulties, respondent 22 noted that, “Our school is in the second year of IQMS, but development of teachers in not going on”. Respondent 20 said that, “Training is generic and not practical”. Moreover respondent 16 concluded that, “IQMS does not help where it is most important, in class. They concentrate on generic issues to do with teaching and learning”.

All instructional leaders (100%) that were interviewed reflected upon their schools and claimed that their schools were learning organisations; they said this on the grounds that their schools together with the DoE were organising many in-service training sessions that teachers were attending on an ongoing basis. Eight out of ten teachers (80%) also indicated that, “their schools have policies to deal with the critical issues of HIV/AIDS and Multiculturalism”. Even in schools that do not have policies on these issues, teachers indicated that schools and teachers were disseminating a lot of information on HIV/AIDS and were sensitive to and respected one another’s cultures.

6.5.12.4 **Teachers' suggestions of an alternative quality assurance framework**

Sixty percent (60%) of teachers' suggestions were that classes were too big; teachers were unable to reach all learners. Forty percent (40%) noted that there are difficulties caused by assessment standards and expectations about what can be achieved and not in a realistic manner. Finally fifty percent (50%) noted that IQMS does not help teachers in class (see Table 6.18).

Respondent 13 suggested that, "The DoE should develop a fair system… to allow production of high quality graduates". Respondent 14 said, "The problem I see is hurried implementation", while respondent 16 said, "The DoE should quickly get trained people to do the work of IQMS and quality assurance bodies". Other suggestions were given a special table 6.19 for teachers as it is felt that they are the people who implement C2005.

Table 6.19 Teachers' suggestions of improvements

Teachers' suggestions	Frequency	%	total
Varying teaching styles can achieve excellence and make lessons authentic.	4 out of 10	40%	10
Training on the guidelines has been identified and should be extended to clarify more issues.	6 out of 10	60%	10
At least 3 years of training might be enough – not 3 days. Even one year is better.	6 out of 10	60%	10
Teachers should be included in curriculum design discussions to make an input.	5 out of 10	50%	10
Training would also be relevant, and practical.	5 out of 10	50%	10
Well-trained people in the place of LFs could do better.	2 out of 10	20%	10
To restore commitment the DoE must seriously address teachers' concerns that are given in observations.	4 out of 10	40%	10
Teachers should be rewarded monetarily to motivate them.	3 out of 10	30%	10
LSMs should come on time and be of good quality.	4 out of 10	40%	10

The suggestions in Table 6.19 apply especially to teachers. Other suggestions for an alternative quality assurance framework have to be

gleaned from the general statements of participants relating to what they wish to see happening in their schools to promote quality.

6.6 Synthesis

A table was designed to synthesise the responses of all the four groups. The intention was to be able to look at the responses and compare the agreements and note trends in the conclusions and support recommendations.

While the details of Table 6.20 are intended to demonstrate common trends in responses that are dealt with in chapter 7, it is important to highlight obvious trends here as well for a qualitative discussion. Difficulties that were cited most frequency are: Lack of knowledge among principals and teachers. The small number of poorly trained Learning Facilitators that were allocated a big number of schools. Another difficulty that was mentioned with high frequency was the difficult terminology of OBE.

Finally instructional leaders repeatedly mentioned the difficulty of exclusion of instructional leaders from discussion of C2005 guidelines. Following the presentation of trends in Table 6.20 is a discussion of the implications and suggestions of the meaning of the trends for instructional leadership ease and difficulties in implementing C2005. These meanings also point at the possible solutions that are the building blocks of the suggested quality assurance framework that is proposed by this research.

Table 6.20 Common trends in all responses

Statements and indicators that appear in the responses of all the four groups		Officials' agreement	Principals' agreement	HoDs' agreement	Teachers' agreement
Instructional Leadership	Principals, HoDs and teachers lack knowledge to implement C2005 effectively on a daily basis.	2 out of 3	20%	20%	20%
	LFs haven't been trained sufficiently, they are too few and have been given very many schools to deal with.	3 out of 3	100%	60%	20%
	The guidelines are imposed on instructional leaders, are generic and not understood.		80%	40%	60%
	Assessment standards are not easy to set and administer.				60%
	The Administrative load of OBE/C2005 is too much especially filing and typing.		60%	40%	60%
	Classes are too big and teachers cannot reach all Learners.		40%		60%
Curriculum Development	Little money was allocated to C2005 transformation.	1 out of 3		60%	
	C2005 was implemented in a hurry.	2 out of 3	80%		
	C2005 designers didn't take teachers' classroom challenges into account.		80%	60%	
	LFs do not master the information they deliver on the RNCS.			40%	70%
	C2005 terminology and CTAs are presented in a difficult English language and concepts.		40%	80%	50%
	Teachers do not master structuring lessons.	1 out of 3			50%
	LSMs are inadequate and come late to school.		40%		40%
Quality Assurance	IQMS training has not been adequate		100%		50%
	Teacher capacity to implement C2005 has not been developed.	1 out of 3		60%	50%
	Quality assurance has its own Directorate.	2 out of 3			
	C2005 has undergone continuous, extensive and quick change.	1 out of 3			60%
Suggestions of an alternative Framework	Set realistic expectations and assessment standards about what can be achieved.				60%
	IQMS to help teachers in class.				50%
	The DoE should include teachers in collaborative discussions of new developments of C2005 guidelines.		60%	40%	50%
	Training for trainers and school personnel (in guidelines) should be longer, practical and relevant.	1 out of 3	60%	40%	

From a comparative analysis, under instructional leadership in Table 6.20, all interviewed groups responded that all instructional leaders lack the

knowledge to implement C2005 effectively. The frequency for all groups with the exception of officials was 20%. One out of three officials agreed with the response (Table 6.20). These views are in agreement with the verbatim statements of respondents.

The verbatim statements are recorded under Tables 6.7, 6.8 6.9 for officials, section 6.5.8.1.1 for principals, section 6.5.10.1.1 for HoDs and 6.5.12.1.1 for teachers.

Analytically however, the statements made by officials should be seen differently from those of the instructional leaders. Because of the high administrative positions of the officials in the hierarchy of the DoE and their function of passing on C2005 guidelines to schools for implementation, their responses represent a positive feedback about the ease and difficulties of instructional leaders to the FSDoE. Officials are in a position to inform the FSDoE that they are aware of the difficulties. Indeed one official told the researcher in confidence that, “we do inform the FSDoE in their reports about the problems that instructional leaders are facing, but the FSDoE is not always responsive to the reports”. Much as the statement is from only one official, for the research it confirms on of the teachers’ statements, that LFs do not relay their problems to the FSDoE. A positive reaction from the FSDoE would be to verify this statement and see that if there is such information in officials’ reports, it is acted upon.

Moreover, statements from instructional leaders ascribed the insufficiency of knowledge that instructional leaders have about implementing C2005 guidelines to inadequate training that they received from LFs. Instructional leaders also noted that they have little confidence that LFs master C2005 guidelines and have the ability to disseminate it effectively. In confirmation of this conclusion, respondent 7 said, “I still find problems with C2005 – I think it is because training is inadequate – I have problems as a facilitator

for teachers. Their trainers are not sufficiently trained themselves". Respondent 17 also said, "I think LFs send to our area are not conversant/do not understand C2005 guidelines''.

The resulting context in which C2005 guidelines are implemented is uninformed. However, the reason why instructional leaders have inadequate understanding differs from the earlier perception in the DoE that the problem was mainly with instructional leaders (see sections 1.1 & 1.2). As the above evidence suggests, instructional leaders ascribe the insufficiency of knowledge about C2005 to inadequacy of training that is given to LFs and the training that LFs give to instructional leaders.

This limitation in knowledge is amplified by literature sources (see sections 2.2.1, 3.5 & 3.5.4) which indicate that it is a prerequisite to create a context in which instructional leaders have sufficient understanding about C2005 if its implementation is to succeed. It is logical that succeeding stages of the development of C2005, inputs and the process of instructional leadership will be compromised if there has not been sufficient knowledge and training of LFs.

Suggestive remedies for the problem of limitation of knowledge that LFs and instructional leaders have would include as apriority, the need to recruit knowledgeable trainers and identify places of training like universities that will provide training and knowledge to LFs and instructional leaders in the short and long terms (see section 6.5.4.4). This conclusion contributes to the development of a framework that leads to a knowledge based training of instructional leadership for implementation of C2005. At the moment this can be done with in service for programmes that have already been launched. Would it not be advisable to train all the new recruits in C2005 guidelines and implementation?

In regard to the Curriculum Development in C2005, no common trends were observed cutting across all interviewed groups. However there were responses with high frequency. In the context of Curriculum Development, 1 out of 3 officials and 60% of HoDs said that a small amount of money was allocated to education. Respondent 2 (official) said, “RNCS was rushed so there was no budget for many of its requirements. E.g. travel, accommodation, catering etc’’.

From an analytical point of view, the allocation of a small amount of money for transformation is a sufficient condition for contextual difficulties like training and creating a knowledge basis in LFs and instructional leaders to continue with efficient implementation of C2005 and start of other programmes that are related to C2005.

Clearly while it is agreeable that pouring more money alone in the education system will not solve problems of C2005, on the basis of empirical evidence and literature sources it is in order to consider an increased amount of money in the budget for education in the future. The suggestion about money could also mean that the DoE requires an arrangement that would economise on money and maximise the returns to investment on educational infrastructure and outcomes on educational instructions.

There were also common trends in the implementation of Curriculum Development as 2 of 3 officials agreed with 80% of principals that the implementation of C2005 was unduly hurried (Oosthuizen, 2004: 3; section 6.5.8.2.2).

The agreement of the two groups not only corroborates teachers’ understanding of their problem that is reflected in their responses, but is in line with literature sources. The trend is a confirmation that implementation of C2005 has to be slowed down for the benefit of thorough reorganisation

and alignment of plans and action on the ground for the whole education system. This will also give some time to C2005 designers of further aspects of C2005 to plan them thoroughly.

In regard to evaluation of Curriculum Development, 80% principals agreed with 60% of HoDs in their responses that designers of C2005 had not taken the needs of instructional leaders on board when they were designing the curriculum. The responses are backed up by literature (see section 1.2.1).

The trend suggests that among the solutions to the problem is the co ordination of curriculum designers' work very closely with that of teachers in the classroom or creating institutional collaboration and cohesion between planning and implementation of C2005.

Other trends that are suggested by only one or two groups include responses that suggested difficulties mentioned by HoDs and teachers about LFs not mastering C2005 guidelines. Then teachers mentioned the difficulty of CTAs terminology and the English language in which they are written. Finally, officials' and teachers' responses agreed that teachers do not master structuring lessons in the classroom. Table 6.20 provides a synthesis that will help bring conclusions of the research together in chapter 7 and point at the way forward for the DoE, in making informed decisions to solve existing problems of the implementation of C2005.

6.7 Conclusion

In this chapter, the research presented what was done, how preparations were made and how data was drawn from the field. Phenomenology was used in the research to get an insight into what works for instructional leaders and special focus was given to the difficulties that they experience in implementing C2005. Responses of officials of the DoE reflected and expressed their concerns from their occupational positions in relation to

C2005 policies and guidelines; however it came through their responses that they are aware of the difficulties that instructional leaders experience in the implementation of C2005.

Facts and figures were given about what works for instructional leaders and especially the difficulties and how they understand the difficulties that they experience in their implementation of C2005. While the figures are also summarised in chapter 7 where they are presented as conclusions and recommendations, it is appropriate to indicate the following: Officials of the FSDoE are aware of the difficulties that instructional leaders experience as expressed in section 6.5.4, Tables 6.7, 6.8, and 6.9. They are also aware that the difficulties call on the DoE to intervene with required financial resources and carefully planned timely and holistic guidance. Among repeatedly mentioned difficulties is the limited training of principals. Principals have not been trained sufficiently to help teachers. This is expressed in section 6.5.8, Table 6.13. HoDs and teachers also received inadequate training. This is also expressed in section, 6.5.10, Table 6.16 and section 6.5.12, Table 6.18.

These findings will stand and convergence with conclusions from literature and conclusions from empirical research that are presented in chapter 7 to form a whole picture of how C2005 is working at the time of writing and what difficulties instructional leaders are experiencing.

CHAPTER 7

CONCLUSIONS, RECOMMENDATIONS AND DEVELOPMENT OF AN ALTERNATIVE QUALITY ASSURANCE FRAMEWORK

7.1 Introduction

The primary aim of the research was to explore, determine and describe the ease and difficulties that instructional leaders (principals, HoDs and teachers) experience in translating C2005 guidelines into programmes and implementing them in the classroom. The research specifically focused on instructional leadership, curriculum development and a quality assurance perspective. It focused on the meanings that the leaders make (how they understand their difficulties) of the difficulties that they have experienced. The contingent aim of the study was for instructional leaders to assess efficiency of current quality assurance structures in addressing instructional leaders' difficulties, with a view to reinforcing them and designing a holistic alternative quality assurance framework that has instructional leaders' input (see sections 1.5 & 1.6).

The primary aim of the study was partly achieved through a review of literature on instructional leadership; curriculum development and quality assurance (see chapters 2, 3, & 4). The literature sources that were reviewed together with the empirical study that was undertaken and their analyses were presented under the following research topic headings: instructional leadership, curriculum development and quality assurance (see section 7.2).

The topic headings were further subdivided into indicators of educational practice, design, dissemination, implementation and evaluation, which were eventually used to inform research questions (Appendices E to E (iv)).

These indicators were found to overlap and have been used interchangeably with others, namely; context, inputs, process and output (or CIPO) indicators which have been used consistently by the DoE *(*see sections 6.3 & 6.4).

7.2 Conclusions and recommendations on Instructional Leadership, Curriculum Development and Quality Assurance

Conclusions on the ease and difficulties that instructional leaders faced in translating C2005 guidelines into classroom programmes were suggested from literature review that was undertaken. Literature analysis was also used to derive meaningful questions which were presented in the form of interviews to participants in the research. Finally, literature conclusions are used to back up empirical research conclusions and to validate joint conclusions and recommendations for improvement, or to dispute old views. Recommendations and guidelines for improvement have been presented in the same format as the analyses and conclusions. The research was organised around the title of the research and developed to answer the research objectives in the context, input, process and outcomes areas in which instructional leaders function (see section 1.4).

In regard to the practice of instructional leadership of C2005, evidence from sections 2.2.1 and 2.2.2 led to the conclusion that, even after the DoE clarified most concepts and aspects of the OBE driven C2005 in the SA schools, at the time of writing, instructional leaders still have contextual difficulties of limited understanding of C2005 guidelines. For example many instructional leaders found it difficult to follow the continuing changes of C2005 policy and guidelines especially at school and classroom levels (see section 2.5). In terms of C2005 policy and guidelines, principals, HoDs and teachers indicated that they were still excluded in the discussion of national policy. The culture of ‘top-down’ still alienated school management and teachers (see section 2.7.4). Instructional leaders have not grasped the

constructivist philosophy, values of lifelong learning, learner centred instruction, quality education and all that forms the basis of OBE based C2005 (see section 2.3).

7.3 An analytical framework for presentation of research conclusions

Responses from a specific sample group are understood to embody the experiences of the group in the different stages of the development of C2005 that are given as the indicators of instructional leaders' functions – design, dissemination, implementation and evaluation. The following indicators have been synthesised from the stages of development of C2005: Indicator 1 (Context, Input and Design (CID)), Indicator 2 (Process of Implementation (PoI)) and Indicator 3 (Evaluation for outcomes (E for O)). Dissemination is understood to be embedded in the inputs (indicator one) in the form of training (see Table 6.1). In order to avoid confusion in referring to principals, the format adopted is: respondent 4, 5, 6, 7 or 8 followed by (principal).

For example, only respondent 5 (principal) mentioned OBE in his two top functions. This principal said, "My first three duties are training teachers to prepare them to implement OBE" (respondent 5 (principal) & Table 6.12). All principals included training, monitoring and human resource responsibilities. Furthermore, it is noted that sections context, processes of implementation and evaluation are sub themes that were created in the course of the study. Therefore, responses do not all equally address the organising themes. Tables 6.18 and 6.19 present the distribution of teachers' responses to interview questions and what they state as their difficulties. The tables reflect issues that teachers stated as their difficulties, sources of difficulties and suggestions of what could be done to address the difficulties.

7.4 Conclusions on the demographic details of respondents

While some of the demographic details of respondents do not have direct bearing on the difficulties that the study sought to determine, they will be reflected upon briefly to seek out what patterns may be relevant to the difficulties.

Of the officials of the DoE that participated in the study, two officials hold Masters level qualifications. While all officials are based in the Free State, officials 2 and 3 indicated that they participated in the national task teams that designed aspects of C2005. It can be inferred that the officials' responses about the difficulties of C2005 would be based on these experience. This gives the officials a measure of credibility and validity.

All principals that were interviewed have at least a junior degree qualification. One principal has an M.Ed. The majority have more than 10 years of practice while two have more than 20 years. What could be read into the qualifications is that their observations of the difficulties would be strengthened by their ability and experience.

Four out of five (80%) HoDs have at least a first degree. Two have higher qualifications; namely, M.Sc. and M.Com. (see Table 6.14). Table 6.15 presents the duties that HoDs consider to be their main responsibilities. Details were also to determine how much experience the instructional leaders have in teaching. Section 6.5.11 shows biographical details of teachers. Table 6.17 shows that all teachers except one, have teaching qualifications. It is worth noting that respondent 23 (teacher) has a Matric certificate only; s/he does not have a professional teaching qualification, but has served for ten years as a teacher. In regard to the difficulties, it raises the challenge of finding out how many similar instances there are and determining their contribution to difficulties. The research at this point has to focus on the conclusions about problems from literature sources.

7.5 Conclusions and recommendations

7.5.1 Instructional leadership

7.5.1.1 Conclusions from literature

Conclusions from literature are that; in terms of policy and guidelines, at the time of writing, principals, HoDs and teachers indicated that they were still excluded in the discussion of national policy. The culture of 'top-down' still alienates school management and teachers (see section 2.7.4). Instructional leaders still have contextual difficulties of limited understanding of C2005 guidelines (see sections 2.2.1 & 2.2.2). Instructional leaders have not grasped the constructivist philosophy, values of lifelong learning, learner centred instruction, quality education and all that form the basis of OBE based C2005 (see section 2.3).

For example many instructional leaders found it difficult to follow the continuing changes of C2005 policy and guidelines especially at school and classroom levels (see section 2.5). Literature on instructional leadership is conclusive that teachers will have to learn and understand political aspirations that underlie C2005 (see section 3.2).

Besides the difficulty of alienation from policy discussions, at the time of writing, literature recounts many cases of instructional leaders who say that they are demoralised. Literature still recounts a vast manifestation of poor culture of teaching, learning and misinterpretations of C2005 guidelines at all levels of the school, from the principal to the teachers.

Further there are studies that have linked OBE with Total Quality Management. The studies have opened the possibility of setting up quality assurance structures that could pre-empt and deal with problems of C2005 (see sections 3.4, 3.5 & 3.5.4). Further difficulties include the fact that principals, HoDs and teachers have not been given in-depth training in the constructivist philosophy that underlies C2005 (see section 2.3).

Moreover, instructional leaders have not understood the concept paradigm shift, and find it hard to infuse the values of human rights, environmental awareness and equity into C2005 in its latest version as NCS. Instructional leaders are experiencing difficulties, for example, in grasping the concept of learning how to learn (see section 2.3), which would prepare them for meaningful participation in C2005 design. In practice, instructional leaders still implement C2005 in a different way to that which the DoE expect. Indeed, instructional leaders have hardly made the paradigm shift that is required by C2005.

Specifically from principals' perspective, literature concludes that HoDs and teachers have difficulties in implementing C2005 (see sections 2.2.1 & 2.3). Similarly there is evidence that the current quality assurance structures do not address instructional leaders' classroom problems (see sections 4.10 & 4.10.3).

With little training on C2005 that lasted three days to two weeks, principals are not able to guide teachers to see projects as only one of the approaches to teaching and learning, together with others. Since principals are not any better informed, they may not advise teachers even when teachers are not doing their classroom projects well and lose lesson objectives (see sections 2.2.1 & 2.8). Moreover while principals can rely on the HoDs and possibly teachers, all instructional leaders find little support from parents (see section 2.9.3).

HoDs help teachers to develop and implement the subject curriculum and supervise its implementation. HoDs share some of the principals' and teachers' difficulties. They share the exclusion of instructional leadership from discussion of C2005 policy and guidelines design, context of big classrooms; limited training and poor support (see sections 2.7.4 & 2.11.1).

Moreover, training of HoDs has not been specifically for their positions in most cases (see section 2.7). Where training was undertaken, HoDs were trained along with teachers.

Furthermore, the OBE theory that underlies C2005 proposes that learners ought to take responsibility for their learning in the implementation of C2005 (see section 2.11.2). However, there is no evidence that learners are taking responsibility for their learning in the SA schools. Moreover, there has not been any induction administered on learners, to condition them so that they can take responsibility for their learning (see section 2.11.2).

Legislation in SA has helped to set out teachers' functions and job descriptions that include: specifications of how to design down outcomes, programmes, develop courses, and design learning units and lesson plans (FSDoE, 2004).

However, teachers have experienced difficulties as a result of "top down" organisation that is applied by the DoE in the implementation of C2005. This approach to organisation takes the initiative away from teachers and turns teachers into mere recipients of government directives, whose duty is to simply implement C2005, without asking any questions.

Literature is also conclusive that teachers have difficulties interpreting C2005 guidelines. Moreover, teachers do not understand C2005 guidelines because they are changing rapidly and continuously (see section 2.11.1). Teacher training for the implementation of C2005 guidelines has been short and inadequate (see sections 2.11.1, 3.5.6 & 3.6.1). As a result teachers' mastery of the technical and cultural dimensions of OBE has been limited. This has compromised teachers' effectiveness in the classroom. To illustrate this problem, teachers have been recorded regularly delivering poorly designed and planned programmes of study and projects that have

had little informed preparation (see sections 2.6.2 & 2.6.3). Furthermore, teachers have problems with assessment (see section 2.11.4).

Teachers' difficulties with assessment also include misunderstanding of C2005 criterion referenced assessment - Continuous Assessment (CASS) which is new to them and the grading range of assessment in which 80% stands for outstanding, 60%-70% for excellent, 60% for achieved, 40% for partially achieved and below 40% for not achieved. Teachers and learners have major problems with the form of assessment that is used in C2005 (see sections 2.11.2 & 2.11.4).

7.5.1.2 **Conclusions from empirical research**

Empirical evidence supports the literature conclusions given above. All instructional leaders noted that the guidelines are imposed on instructional leaders, they are generic and not understood (see Table 6.20). Responses of the officials of the FSDoE, section 6.5.4 Tables 6.7, 6.8 and 6.9 lead to the conclusion that the DoE was allocated a small amount of money to improve teaching and learning. Learning Facilitators are few and have been given too many schools to train and support (in this respect supported by principals, HoDs and teachers (see Table 6.20).

In terms of practical implementation of instructional leadership, officials' responses in section 6.5.4.1.1, Tables 6.7, 6.8 led to the conclusion that LFs were too few. Their training was not relevant (Table 6.20). HoDs also said that LFs are not well trained; consequently LFs' training was poor (Tables 6.16 & 6.18).

In evaluating all instructional leadership efforts, officials conclusively noted difficulties in money, hurried implementation of C2005 and poor training that was not relevant. What is needed is training on interpretation of C2005

guidelines in class. C2005 was rushed too much, and principals and teachers still have much misunderstanding of C2005 guidelines.

Another conclusion is that the nationally prescribed assessment standards are not easy to set and administer correctly at classroom level (see Table 6.18). The responses show that the DoE officials are aware that the problems are related to the small amount of money that has been allocated to the DoE (see Table 6.7). The principles of C2005 have proved difficult while the regulations of C2005 result in a lot of administrative work for all instructional leaders. Guidelines leave teachers with much time to fill the gap.

Empirical research from section 6.5.10.1.3 leads to the conclusion that training has been generic and not helpful in implementing C2005. Further evidence is conclusive that the teams chosen by the DoE to design C2005 guidelines are usually not informed about the school and classroom level problems. Literature also concludes that the DoE training itself hardly follows from researched teachers' needs and an attempt has not been made to always base training on the school premises where it is of immediate use (see section 3.5.5). For their part, teachers have difficulty in conceptualising C2005 (see section 3.2). Teachers still find the language of C2005 difficult.

Empirical evidence supports the literature conclusions about the difficulty of an autocratic approach to the implementation of C2005. Evidence provided by Table 6.9, leads to the conclusion that teachers have not bought into C2005. Teachers have not made a paradigm change. Further evidence from section 6.5.10.1.2, Table 6.16, also leads to the conclusion that some of the difficulties for instructional leadership are that design teams do not take teachers classroom experiences into account when they design C2005 guidelines. Moreover, instructional leaders see C2005 adding a lot of administrative work for teachers (see section 6.5.8.1.3, Tables 6.16 & 6.18).

Evidence provided in section 6.5.12.1.2 and table 6.18 also leads to the conclusion that in the process of implementation of instructional leadership of C2005 teachers experience the difficulty of short inadequate training sessions on assessment standards of C2005 guidelines. In this regard teachers say that they can only implement one standard a year. CTAs are hard. Trainers are not competent (see Table 6.16); they are also struggling with guidelines. Besides, C2005 has been presented in the English language, which trainers, teachers and learners do not understand well (see Table 6.18).

In evaluating the difficulties of instructional leadership section 6.5.4.1.3 lead to the conclusion that DoE needs a bigger budget to employ more LFs and train them thoroughly. Besides the limited supply of LFs, teachers don't seem to believe in what they are teaching. There are difficulties in LFs' poor training and big classes that teachers face in classes on a daily basis. Training should concentrate on interpretation (see Tables 6.7 & 6.13). There was inadequate training and it is done by people who also know little regarding OBE….. Training places too much emphasis on assessment".

Evidence that is provided in section 6.5.12.1.3, Table 6.18 led to the conclusion that C2005 guidelines are short and leave teachers in need of something to fill the gap up to the end of lessons. These conclusions are corroborated by the synthesis table 6.20.

The summary conclusion of the difficulties, from both literature and empirical study is that even though instructional leaders continue to have C2005 guidelines imposed on them, at the time of writing, they have grave difficulty catching up with rapid changes of C2005. Instructional leaders stated that they received inadequate training from LFs who also don't instill confidence that they master C2005 guidelines. Instructional leaders' training has not

been relevant. They find C2005 guidelines and assessment tools such as CTAs framed in difficult language and concepts. The statement of the difficulties answers the research objective of what difficulties instructional leaders experience in their interpretation and implementation of C2005 guidelines in the classroom.

7.5.1.3 **Recommendations on Instructional Leadership**

On the basis of these conclusions drawn from sections 7.5.1.1 and 7.5.1.2, the following recommendations are made:

- The DoE is advised to slow down the implementation of C2005 (those aspects that are being designed presently). The reason for slowing the pace is to give the DoE time to focus on financing, training and organising logistic support for the programme.
- The DoE is advised to secure funds to finance recruitment of trainers and increase the depth of their training and development. Instructional leaders suggested that sufficient training would take at least 6 months to three years of training in institutions of higher learning.
- That the DoE develop a collaborative system that will involve instructional leaders in the discussion of development of C2005 guidelines. The involvement of instructional leaders is a condition for their buying into the programme and co owning it.
- The DoE create a system that will allow teachers to make an input about the conditions at school to the committees that design part of C2005.
- The DoE is advised to clarify the purpose of training and indicate it is for the translation of guidelines when such training takes place. Training should be made practical and not just theoretical, moreover, trainers are expected to demonstrate how to translate C2005 guidelines into classroom programmes and deliver them in class.

- The DoE is advised to deepen training of LFs and teachers. This could be by approaching and funding courses at university level in C2005, then giving time for LFs and instructional leaders to develop skills in the institutions.
- The DoE is advised to make training in C2005 appropriate for the purpose and levels and be of sufficient length to increase the opportunities of a better grasp of the details of C2005 guidelines by instructional leaders.

7.5.2 **Curriculum Development**

7.5.2.1 **Conclusions from literature**

Literature evidence in sections 3.2, 3.4.1 and 3.5 led to the conclusion that there were difficulties arising from excluding instructional leaders in C2005 policy and guidelines discussions in regard to Curriculum Development. One important difficulty is that the selected teams the DoE has chosen to design C2005 guidelines are usually not informed about the school and classroom level problems. For their part, teachers have difficulty in conceptualising C2005. Furthermore section 3.5 led to the conclusion that there was a difficulty of contradictions resulting from critical and developmental outcomes prescribing content, yet the DoE also assert that OBE is democratic and allows teachers to choose the content of their lessons. Moreover, section 3.4.2 led to the conclusion that while “top down” advocacies have helped to state what the DoE wanted about C2005 implementation, advocacies were part of the difficulties of dissemination and implementation of C2005, they fell far short of fully training instructional leaders.

Section 3.5 also showed that the absence of a collaborative culture from the “top down” has resulted in poor communication between principals and teachers. The result of this poor communication is another difficulty that

instructional leadership have presently; the communication gap has compromised quality training.

Once the decision to implement C2005 was taken, sections 3.2, 3.4, 3.5 and 3.5.4 indicate that there was a difficulty in that C2005 was implemented in a hurry, haphazardly, without much planning, without teachers' participation. Quality assurance structures such as Total Quality Management that could have pre-empted and dealt with problems of the implementation of C2005 were overlooked. Moreover, primary research indicates that teachers will have to learn and understand and implement political aspirations that underlie C2005.

Sections 3.5.5, 3.5.6, 3.6 and 3.6.3 highlight the difficulty of teachers who were expected to deal with new contexts such as Multicultural society and HIV/AIDS, structures like SGBs, methods of C2005 such as train-reflect-train, yet the sections conclude that many of the teachers have not been trained; others are un/under qualified even simply to teach. Teachers still talk and chalk in classrooms.

Section 3.5.5 leads to the conclusion that the DoE did not start training from researched teachers' needs. Training has not been based on the school premises where it is of immediate use. Section 3.6.3 is a testimony that training contents still lack a large content of professionalising teachers; emphasis should be on the basics of reading, writing and mathematics. Training does not instil accountability in teachers and LSMs are delivered late.

Section 3.6.4 and 4.13.1.1 also lead to the conclusion that teachers are faced with new difficulties and challenges of HIV/AIDS and have to cope and adapt. They also have to accept and prepare to live in a multicultural

society. Moreover they have to learn new methods of assessment with the CTAs.

Sections 2.9.1 and 2.9.2 testify that the DoE has legislated C2005 changes that are concentrated on the technical side of educational organisation and left out value of quality culture. Such culture becomes part of teachers' normal performance in their regular daily activities and relations. The quality relations are ultimately institutionalised and guide teachers' continuous performance**.** Omission of quality culture contributes to the difficulties related to achievement of quality. Sections 2.9.2 and 2.9.3 indicate that change in knowledge is creating some difficulties. For example, How do teachers change their teaching to accommodate the new methods (Mode 2) of generating knowledge? There is a need to examine changes in knowledge generation, its types, and viable models of knowledge generation that would contribute to transformational changes – above all to examine the learning organisation/community. These conclusions concur with those of the synthesis of all responses presented in Table 6.20. These conclusions make sense when they are placed alongside empirical evidence that is examined next.

7.5.2.2 **Conclusions on Curriculum Development from empirical research**

Evidence from section 6.5.12.1.3, Table 6.13 agrees with literature conclusions on instructional leadership that the "top down" and hurried culture of implementing decisions by the DoE would alienate teachers and not allow them to buy into C2005 and co-own it. It would also lead C2005 guideline designers not to take classroom experiences into account.

Evidence from section 6.5.4.2.1 and Table 6.7 on Curriculum Development led to the conclusion that teachers had a difficulty that arose from transformation and continuous change in C2005. Related to this difficulty,

little understanding and knowledge that instructional leaders have about C2005 guidelines and the need to learn how to interpret them well. Less and generic training have not helped teachers. Tables 6.8 and 6.20 highlight the difficulty that, suppliers of LSMs had difficulties because the materials that they supplied to schools were often late and of poor quality. The source further noted the difficulty of teachers' training that needed to concentrate on interpretation of C2005 guidelines, assessment standards and mastery of C2005. An allocation of more money, recruitment of more LFs, thorough training will produce LFs who can be trusted and be receptive to teachers' problems.

Evidence provided in section 6.5.4.2.3 and responses in Tables 6.7 and 6.8 led to the conclusion that teachers were not enthusiastic about C2005. Part of the problem is that teachers had not been brought into discussions about C2005. Other difficulties derive from teachers' misunderstanding of the guidelines and assessment of C2005 at school level and the conditions of implementation of C2005.

Section 6.5.10.2.1 led to the conclusion that training which teachers received was generic. Its emphasis in it was to explain the OBE logic, the white paper regarding paradigm change. Table 6.16 also showed that another difficulty was that the DoE allocated a small amount of money for education transformation leading to inadequate training to the small number of LFs which HoDs and teachers do not trust; consequently a small amount of money was allocated to schools. Section 6.5.12.2.1 and Table 6.18 are conclusive that, C2005 terminology and CTAs present difficulties of English language and technical concepts.

Section 6.5.4.2.2, Tables 6.7 and 6.9 also led to the conclusion that the difficulty of curriculum for instructional leaders is continuous changes and teachers who have not learned how to interpret C2005 well.

Responses in sections 6.5.8.2.2, Table 6.13 led to the conclusion that there were too many and quick changes. Training sessions have been too short at 3-5 days; 3-6 months would be more adequate according to respondent 4.

Evidence in section 6.5.10.2.2 led to the conclusion that difficulties arise out of the different aspects of C2005. There are restrictions to teachers' initiatives and loss of authority in the C2005 guidelines (see Table 6.16). Most of the teachers' functions have been prescribed to the extent where teachers may not choose how to schedule, pace, deliver and assess lessons.

In section 6.5.12.2.2 teachers' responses led to the conclusion that the difficulty was that training emphasised implementation of RNCS. The administrative load of OBE is too much, especially filing and typing.

Section 6.5.8.2.3, Table 6.13 led to the conclusion that difficulties such as unclear C2005 guidelines, limited resources and lack of collaboration in designing C2005 could be addressed. It is noted that these difficulties also apply to differing extents to context and implementation. A longer time of training such as three to six months training would be more adequate.

Evidence from section 6.5.10.2.3 and Table 6.16 lead to the conclusion that C2005 is complex for instructional leaders because it has many interpretations. Some instructional leadership claim that lesson schedules are determined by C2005 guidelines. Teachers do not have much flexibility

to design lessons because LFs would not approve programmes that they think deviate from guidelines.

In summary, the difficulties regarding Curriculum Development in C2005 are: Instructional leaders find C2005 guidelines imposed, difficult to interpret and lacking in the understanding of the challenges that teachers face in the classroom. The fast pace of changes in C2005 guidelines has not allowed instructional leader to grasp the C2005. Training has been inadequate in most respects. This summary of identified difficulties responds to the objective of determining the ease and difficulties that instructional leaders experience in translating C2005 guidelines to programmes in class. The recommendations that follow are intended to address the difficulties collectively and individually.

7.5.2.3 **Recommendations on Curriculum Development**

On the basis of the evidence presented in sections 7.5.2.1 and 7.5.2.2 on Curriculum Development, the following recommendations are made:

- The DoE is advised to consider developing very close collaboration among curriculum designers, developers and instructional leaders. Collaboration will ensure efficient communication to and from C2005 planning and enhance informed, effective classroom implementation.
- The DoE is advised to involve Instructional Leadership more at the level of Curriculum Development. This is to ensure that teachers, who are the implementers of C2005 guidelines, feel that they have been part of C2005 from its planning stage and co own it.
- The DoE is advised to slow down the pace of implementing C2005 while detailed preparations are made in the form of research and information development and consolidation.
- The DoE is advised to develop a system that can identify the needs of teachers within C2005 and tailor teachers' training to address their

needs. It is contingently advisable to approach instructional leadership training holistically and provide finance, location such as university for trainers, and support.

- The DoE is advised to develop a quality culture that will form the basis of sustained change. In this case the tried and tested systems such as TQM and ISO 9000 would give an input.

7.5.3 **Conclusions on Quality Assurance**

7.5.3.1 **Conclusions from literature on quality assurance**

While contextually the DoE has initiated changes to C2005, and set up a hierarchical framework for continued change and quality educational delivery, sections 4.2.1 and 4.2.2 lead to the conclusion that instructional leaders still have difficulties that stem from their exclusion from the development of C2005 and its quality assurance. Consequently instructional leaders have difficulty understanding and incorporating national aspirations of integration, redress, access and quality relevance, credibility, standards, legitimacy, articulation and incorporating them into programming and teaching in class.

Section 4.10.1 and 4.10.3 are conclusive in that instructional leaders want quality assurance that is related to classroom improvement and dislike one that is related closely with inspection. They do not understand WSE and IQMS and have had little training in them. Teachers have problems buying into ETQAs because they have minimal participation in them. Workshops for teachers on WSE and IQMS have had limited success – teachers are still confused. They have problems with monitoring and audits that they find threatening. Learners have also created many difficulties, as they do not take responsibility for learning as expected. Section 4.3 shows that learners come from communities with limited knowledge hence teachers have to understand the conditions and help learners. However, improvement of facilities needs monetary support that is not there.

7.5.3.2 **Conclusions from empirical research on Quality Assurance**

Evidence in section 6.5.8.3.1 supports conclusions from literature that the IQMS has a very unwieldy "top down" bureaucracy. Section 6.5.4.3.1 and Table 6.7 led to the conclusion that one of the difficulties was limited knowledge that was available when C2005 was introduced. In order to make up for that limitation, universities should be contracted to come with expertise. The other difficulty is that there is such fragmentation between and in the departments that the section responsible for quality assurance is expected to do quality assurance work on its own. In this way the section fails to address quality demands of other sections.

The other conclusion is that even though the SAQA should have a local flair, knowledge from international quality assurance bodies and systems of quality assurance such as TQM and ISO 9000 should be taken on board so that SA will be able to compare its educational performance with other countries (see Table 6.7).

There was inadequate training on C2005, quality assurance structures of the IQMS which principals have to implement without sufficient training. In this regard, respondent 4 (principal) said, "As a consequence of the limited knowledge of C2005 and IQMS, principals are not even able to make the quality assurance work through teachers. This situation could improve if the DoE listened to teachers and try to create a culture of participation/collaboration".

Evidence in section 6.5.10.3.1 and Table 6.16 led to the conclusion that the IQMS and its agencies came into the context of an insufficient knowledge basis as most of the school personnel have limited training on OBE.

Section 6.5.12.3.1 and Table 6.18 led to the conclusion that the difficulty with IQMS has been that that training on IQMS has not been adequate.

Further, IQMS has not helped to develop teachers' capacity to implement C2005 generally.

Section 6.5.4.3.2 and Tables 6.8, 6.9 has led to the conclusion that there is fragmentation in the offices of the province; quality assurance is dealt with in the Directorate: Quality Assurance. Officials expected the Directorate to deal with IQMS and its agencies, WSE and DAS. Other issues that have become additional descriptors of quality of the curriculum such as HIV/AIDS, Multiculturalism and whether the school is a learning organisation and the curriculum embraces the concept of culture of a learning organisation.

Evidence provided in section 6.5.8.3.2 and Table 6.16 led to the conclusion that there had not been a demonstration of the best lesson in C2005. Such demonstrations would give guidance to principals and teachers and set quality levels to be achieved by all instructional leaders as a quality measure. Evidence also led to the conclusion that there was a big increase in the administrative work. This section also led to the conclusion that some difficulties relate to hurried implementation of C2005 generally.

Further evidence in section 6.5.4.3.3 and Tables 6.7, 6.8 has led to the conclusion that HIV/AIDS and Multiculturalism are important issues that are being reflected in the school as part of quality education. Section 6.5.10.3.3 is also conclusive that HIV/AIDS programmes that were not supported by a formal policy; however robust programmes had been established to address as a public responsibility of multiculturalism and HIV/AIDS.

Evidence in section 6.5.8.3.3 and Table 6.13 led to the conclusion that instructional leaders had limited training on IQMS. Also those LFs did not master C2005.

Section 6.5.12.3.3 and Table 6.18 led to the conclusion that the difficulty about IQMS was that the training that teachers got was inadequate. It has not helped to develop teachers' capacity to implement C2005 generally. IQMS does not help in classrooms where it is most important.

In regard to quality, the summary of the difficulties that instructional leaders experience is: Knowledge about C2005 is little from both trainers and instructional leaders. Instructional leaders have a view that they have been excluded from discussions about designs of the guidelines. Consequently instructional leaders have no stake and are unable to buy into C2005 and co own it. The present quality assurance bodies, above all IQMS are not helping teachers. In some instances instructional leaders say that the quality assurance bodies are primarily evaluating and threatening. An alternative system should have a large measure of collaboration and research of the needs of implementers on C2005 guidelines. Training has not been focused and empowering. These difficulties are stated in response to the objective of instructional leaders' evaluation of the present quality assurance bodies to establish what reinforcement could be given to the bodies or/and what alternative quality assurance framework could be developed.

7.5.3.3 **Recommendations on Quality Assurance**

On the basis of evidence provided in sections 7.5.3.1 and 7.5.3.2 the following recommendations are made:

- The DoE is advised to seek involvement of instructional leaders in the discussion of C2005 guidelines at the level of formulation to get their commitment, to give them a stake and allow them to buy into the C2005 programme. This will allow them to understand the reasons for the demands of C2005 and establish their roles in the implementation and commitment.

- The DoE is advised to select quality assurance systems that are developmental and not evaluative and threatening to instructional leaders as the present ones do.
- Training on quality assurance has to be thorough and aim at empowering instructional leaders. It has to be evaluated on a continuing basis for adequacy.

7.5.4 **Suggestions about improvement and an alternative quality assurance framework**

7.5.4.1 **Conclusions from literature**

Section 4.15 is conclusive that in spite of the claims by the FSDoE that most trainers and teachers had received training in IQMS from the year 2005 (DoE, 2006: 29), most teachers are ignorant of IQMS. Literature suggests that it will be meaningful in the long run to incorporate tried and tested systems such as Total Quality Management and International Standards Organisation and include all national aspirations in a modified framework. These are compatible with OBE and have an established culture.

The other conclusion is that even though the SAQA should have a local flair, knowledge from international quality assurance bodies and systems of quality assurance such as ISO 9000 should be taken on board for comparison. Moreover TQM and ISO 9000 have helped many new systems to start. The South African Bureau of Standards (SABS) has adopted ISO 9000 in its totality. Besides it is known to release the potential of all employees.

Evidence from literature in section 4.13 suggests that all quality systems are constrained to work within policy frameworks – in SA that is determined by SAQA and the DoE. However, literature evidence is also conclusive that within the OBE driven C2005 quality assurance will have to be criterion referenced.

Section 4.13.1 leads to the conclusion that quality assurance has to be participative and collaborative, allowing teachers to discuss policy developments. From a more holistic perspective section 4.13.1.2 suggests that teachers and School Management Teams (SMTs) should develop schools as learning organisations, especially to assure quality during the time of change.

Sections 4.10.3 and 4.12 are conclusive that the problem of past quality assurance measures is that they neglected grassroots level participation and training. However section 4.10.3 and 4.12 provides evidence that the OBE oriented C2005 is compatible with TQM and the two would have a lot of mutual benefits in development.

7.5.4.2 **Conclusions on suggestions from empirical research**

Responses in section 6.5.4.4 led to the conclusion that the DoE must allocate more money for personnel and resources. Quality assurance in SA must have aspects of tried and tested (or universal) quality assurance systems such as the TQM and ISO 9000 to facilitate comparison of SA educational products with those of the developed world. The culture of teaching and learning has been restored, but more needs to be done. School level measures of quality assurance should learn from and rely on university Quality Assurance.

Section 6.5.8.4 responses led to the conclusion that there should be a longer time given for the training of trainers and teachers. There should be knowledgeable trainers. Responses in section 6.5.12.4 led to the conclusion that teachers had classes which were too big; teachers are unable to reach all learners. There were difficulties caused by assessment standards and expectations about what can be achieved and not realistically (see Table 6.18). Finally that IQMS does not help teachers in class. Teachers' responses were also scrutinised further for evidence of suggestions that

teachers could make regarding improvement of teaching, and the results are presented in Table 6.19.

The suggestions in Table 6.19 apply especially to teachers. Other suggestions for an alternative quality assurance framework include the following: A system that is developed should train trainers thoroughly (Table 6.20). Table 6.20 is also conclusive that the DoE should include teachers in collaborative discussions of the new developments of C2005 guidelines.

The summary of suggestions about what alternative quality assurance framework can be designed with instructional leaders' input includes the following: a proposal for tried and tested systems of quality assurance such as TQM and ISO 9000, that would support changes with culture of mobilised manpower. The system will directly revolve around the purpose of the DoE of achieving desirable outcomes in learning. Aspects that form phases of development of the system include context, input, process and output. These are captured in individual group responses and in the synthesis Table 20. They answer the objective of what quality assurance framework could be designed to overcome the difficulties.

7.5.4.3 **Recommendations on an alternative quality assurance framework**

Based on the evidence provided in sections 7.5.4.1 and 7.5.4.2 the following recommendations are made:

- The DoE is advised to develop very robust training on quality assurance that involves a strong knowledge base, longer time of training and reflection.
- The DoE is advised to incorporate knowledge from conventional quality assurance systems such as the TQM and ISO 9000 as a basis from which to develop a home system for ongoing changes and C2005 programmes.

- The DoE is advised to develop and adopt collaborative and participative approach to quality assurance.

7.6 Guidelines for the implementation of recommendations within C2005

The literature reviewed and empirical research suggests that any changes undertaken as a consequence of the recommendation of this research should be regarded as changes to a system. From the holistic systemic approach and logic, the individual suggestions will have a lasting impact and sustainability when they are seen as part of a holistic systemic change process. Once the DoE embraces the holistic change through policy, then the whole culture that supports C2005 can drive individual changes and sustain them.

7.6.1 **Policy driven Changes**

From the last recommendation of organisational change, the following guidelines are proffered for policy framework within which other changes could take place. The most important guideline is that:

- The Minister of Education could put a task team (A Research and Development [R&D]) or department to work out precise details of general and particular changes that are needed in the organisation of a collaborative education structure. The structure will monitor the human resources, deployment and retention of personnel in the DoE. The task team that may in the end become a permanent division should be manned by professionals in education (preferably in C2005). They should be skilled in handling policy, quality assurance, research and development and accounts, to be able to deal with the needed changes. It is advisable that a division should be created by legislation. It should be based in the province but coordinate work where necessary with the national DoE, to broadly research, advise the DoE on the needed change and facilitate the change initially and

on an ongoing basis. The policy changes on which the division would advise include the recommendations of this study (see sections 7.5.1.3).

7.6.2 **Guidelines on instructional leadership**

In the first phase of development of a curriculum like C2005, a lot of things can be secured from going wrong with adoption of conventional quality assurance systems that are presented in the alternative quality assurance framework. These systems will inculcate the values of collaboration and quality culture. Curriculum and its parts can continue to be developed more effectively on the basis of quality culture.

7.6.3 **Principals' involvement in policy discussions**

- The DoE is advised to use the quality assurance structure to open up policy discussions to principals, who could form committees. The DoE is advised to prepare the principals by building their capacity through training in policy making and implementation.

- DoE should designate a training consultancy with a reliable company to look after the training of principals as indicated in section 7.5.1.3. Finally the DoE should identify and also recommend trainers of trainers among teaching personnel (see 2.4.1). Training officials should aim at turning principals into agents of change and guardians of constitutional requirements who can train teachers to make a paradigm change (see sections 2.4.1 & 6.8.3.4).

7.6.4 **HoDs' Empowerment**

- The DoE is advised to arrange extended training for HoDs at tertiary institutions to ensure that they would be in a position to train teachers. HoDs should be empowered to participate in the policy design, learning and implementation. HoDs should be trained as change

agents like principals. The DoE is to see that HoDs are give separate appropriate training and support in the development of C2005 and its aspects.

7.6.5 **Teacher Empowerment**

- The DoE and FSDoE is advised to assign a R&D team to design and recommend a quality structure that comprises the existing accreditation structures, the TQM, ISO 9000 and the SA quality values that will work and pervade all quality assurance institutions and individual behaviour. Such a structure and its culture will also pervade teachers' training in universities or training institutions that should be manned by university lecturers. Teachers' training should go along with an induction about C2005. The induction should be extended to learners with the explanation of the learner's role in quality implementation of C2005, as recommended in section 7.5.4.

7.6.6 **Guidelines on Curriculum Development**

- Within the framework of policy making as stated in 7.5.2.3 C2005 design teams should adopt the quality culture recommended in section 7.5.2.3 to work with instructional leaders collaboratively to design C2005 guidelines that have the classroom information. These will ensure that the technical and language details are worked out at the design stage. HoDs and teachers would be trained thoroughly to prepare them for co owning the process of C2005 development as recommended in sections 7.5.1.3.

7.6.7 **Guidelines on quality assurance**

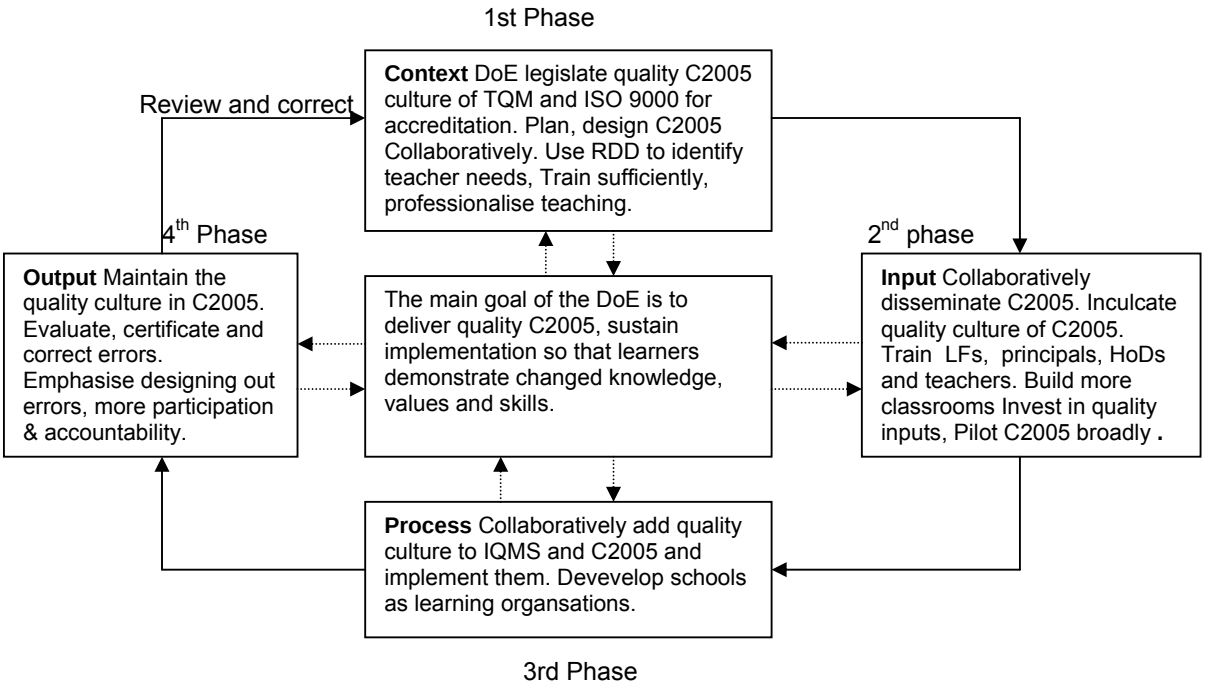
The DoE could contract or influence universities to offer specific courses that are tailored to train all school personnel in quality structure and culture development. The content should include the school as a learning organisation and the role of quality culture and that of the instructional

leaders in the learning organisation. These would prepare instructional leaders to implement C2005 optimally as recommended. The recommendations and guidelines would be implemented comprehensively in a well organized, paced and informed manner as illustrated in the framework that is presented in the next section.

7.7 A South African Quality Assurance Framework

The framework accommodates all stakeholders and has the following qualities. It allows teachers to make an input into policy and guidelines. The framework design assumes that permanent change in people is based on habit and culture. The framework suggests that there is a lot of potential for self sustenance in an organisation that is a learning organisation. The framework will be collaborative and have dimensions and elements of tried and tested quality assurance systems such as the 1S0 9000 along with unique SA values that indicate the needs of SA.

Fig 7.1 A quality assurance framework designed from systems thinking



The four phases of the complementary and an alternative framework for quality assurance of C2005 and parts of its development in Fig 7.1 are explained below:

The framework is a synthesis of the indicators of instructional leadership, curriculum development and quality assurance, literature and responses of the participants in this research. The four phases that are interchangeable with a system derive from the last question and objective of the research. The question was: What improvement and alternative quality assurance framework could be designed to enhance successful implementation of C2005? So the central purpose of the framework is the main goal of the DoE, which is to deliver quality C2005, sustain implementation so that learners demonstrate changed knowledge, values and skills.

1st Phase

This phase derives from both the central purpose of the DoE and the responses of officials and instructional leaders, who are the first inputs after the curriculum has been designed. Instructional leaders indicated in the interviews that they do not have the knowledge to implement C2005 efficiently. Their responses indicated that they need a lot of training as inputs in the planning and the implementation of C2005 (see sections 6.5.12.2.1 and 6.5.12.2.1).

To achieve the main purpose of the DoE that forms the central reason d'etre of the framework, the first material, temporal phase is to create a legislative context for directives; the first being the formal foundation and constitution of the system and framework. The details of the structure will be developed from the central purpose, articulation and methods of pursuing the goal of the DoE.

Within the first phase, literature suggests that it is necessary to have a quality culture to act as a basis from which to construct specific new systems. Such a quality culture could be established through conventional quality assurance systems such as the TQM and ISO 9000. The DoE should move to a better culture with the use of TQM and ISO 9000.

It has to be stated that this research is following recommendations from this study and others that have been closely working on C2005 and are of the opinion that the SA version of quality provision accreditation and personal persuasion in C2005 should benefit from the knowledge that is available globally on quality assurance. Indeed most of the quality assurance that is carried out by the official bodies that accredit courses and certification should remain and only be strengthened through the introduction of quality culture that has to be created within school activities.

Another necessary DoE initiative is to arrange a structural provision for a form of RDD to be established so that it can research and identify teachers' needs with them. The DoE should move to a better culture with the use of TQM and ISO 9000. Tasks for development of C2005 and its constituent parts start with the articulation of constituent parts, such as FET, development of appropriate methods and the design of a timetable. Then the RDD takes the issue to identify needs. Future scenarios are played to design problems out. Moreover, there is a recommendation that the DoE should transform schools into learning organisations to facilitate handling of rapid and continuous changes that also need sustainability.

Pilot and implementation could be done within three years when the DoE is satisfied that the programme works. Moreover teachers who were interviewed said that needed three years to have thorough tertiary level training in the implementation of C2005. Hereafter the programme goes to the second phase.

2nd Phase

This phase also includes collaboration that is recommended to bring those stake holders that are responsible for dissemination of C2005 guidelines together. As the framework assumed that an OBE culture would be created in the first phase, the culture is to be put into practice, as the way things are done in the SA education system and in schools, in the second phase.

Further in-service training would be undertaken specifically for dissemination of C2005 at this stage. In this regard, the DoE could request a section or unit in the tertiary institutions that would be devoted to the process of implementing C2005. These sections of tertiary institutions would train all personnel including LFs, principals and teachers for dissemination of C2005.

Finally at this phase the DoE as the driver of the framework would look at the development of quality in the education and school infrastructure to meet the intellectual quality that would be demanded from instructional leaders. Alongside the infrastructure, the framework would require the DoE to organise well paced piloting of those aspects of C2005 that are being currently in schools. Piloting would be done as broadly as possible to include all school types or all schools where possible in the pilots of the aspects of C2005.

3rd Phase

In the third phase C2005 would be implemented in a fully informed and well paced manner. This phase continues on the progress that ought to be made at the second phase. Phase three still works in a collaborative way with the primary intention to meet the requirements of the DoE that are at the centre of the quality assurance framework.

Collaboration in the process of implementation does not mean leaving instructional leaders to get along with it, but it is a joint responsibility that has made instructional leadership truly part of the implementation team. The team will be tied together by professionalism that is espoused by the framework from phase one, in-depth knowledge of C2005 and quality assurance principles, such as the 14 points of Deming or those of IS0 9000 that apply to schools. This team component is what is lacking in the present efforts made by the IQMS, WSE and HRM to involve teachers and solve their problems.

In spite of collaboration in this phase, the DoE and school management teams still take the responsibility for inculcating a better culture of quality and that of schools as learning organization so that schools can deal with change and high expectations (Coetzee, 2002:62; see section 2.6.1, Fig 2.3). Instructional leaders' participation will make it possible to preempt problems and anticipate them in the design aspects of C2005. A symbiotic relationship is established and sustained between the central goals of the DoE and the personnel discharging the functions of phase four. The activities of phase three could last for 6 months to three years. The outcomes of phase three are the beginning of those of phase four.

4th Phase

Finally there is evaluation and corrections. All these are made collaboratively with at least more than three practicing teachers who rotate and the DoE facilitates their participation in the programme.

This phase would be characterized by evaluation, continuous feedback and corrective measures. The phase still takes its cue from the intentions of the DoE in the centre and integrates the outcomes of phase three and those that are evaluative and belong to forth phase.

The forth phase is about using TQM strategies to involve all stakeholders in determining whether the goals set by the DoE for the delivery of quality in the centre of the framework have been achieved. In the phase there would be sections dealing with evaluation of the whole framework and its parts such as those dealing with instructional leadership, curriculum development and quality assurance together with their indicators, but these will be done collaboratively in the recommended framework. There would be a section dealing with certification to recognize achievement of the NQF expectations at school level. This framework would then restart from a higher level and repeat itself in a more refined manner. It would move through the same processes at a higher level in an upward ever perfected spiral that would keep improving all aspects of delivery of quality in C2005 until delivery of such quality begins to come naturally without effort as the way we deal with things in the country and in schools.

7.8 Some of the problems of the research

The subject of this research has been changing as the political landscape changes. When the research programme was conceived in 2000, the researcher's intention was to investigate an appropriate quality assurance system that could be adopted to help pre-empt problems such as those that were found in 2000 by the review committee to pave the way for smooth implementation of C2005.

By 2000, many problems of implementation of C2005 were revealed by the committee of review. Quality assurance structures such as DAS and later ETQAs were established. The study had to adapt and aim to still pin down the problems of instructional leadership, curriculum development and quality assurance, and the continuing problems of implementing C2005. Hence the focus of the study is on the difficulties of instructional leadership and curriculum development, adopting a quality assurance perspective. Instructional leaders' thoughts, opinions and the meanings they give to their

experiences have been established through literature and empirical research. The researcher in this project envisaged a quality assurance perspective that would view and generate a quality assurance framework. The framework would be designed in such a way that it would still address real problems of implementers. The framework or system would pre-empt problems in the future and in some cases design them out.

Another problem that is related to the same theme is that literature on C2005 is limited and is only accumulating at the time of writing. This means that the area of C2005 is fertile for research and proposals of new directions, but it is also difficult to depend on current writings such as internet that is inaccessible and sometimes contains dated information. Of course, the internet can also be used by very many people who are not academically oriented in their writing; hence it could give some information with little reliability as a source of authority opinion. It is also difficult to research strictly according to plan because teachers have so many tasks that at times they cancel appointments.

7.9 Limitation of the Study

According to Anderson (1990:148-156) a study like this one would have required a prolonged period of stay with teachers while doing the research so that the researcher could capture the daily nuances of staff as described by Anderson. Prolonged period of stay in the course of doing this project was not possible because of time and resources. For this reason the study does not have a profound thick description of instructional leaders' experiences that could have been offered by few respondents. In defence of the results of the study and a compensation for the acknowledged limitation, the bigger number of instructional leaders that was interviewed offers a wider perspective of their experiences.

In terms of questions on the validity and reliability of the instruments that were designed for the study, Thyne (1974:5) indicated that there are no absolutely reliable or valid measures. Rather that all measures have a degree of validity and reliability. Furthermore, to the defence of the research, the subject, C2005 is changing very fast as do the teachers' conditions and understanding.

It is also acknowledged that as the study took a long while and C2005 is changing so fast, some literature is dated and some conditions implied by literature have improved because of continued training. However, a conscious effort was made to find the latest statements of C2005 policy on the internet and newspapers.

Another limitation could be that the sample was biased as the random sampling technique could only be applied minimally. However, the research has followed a legitimate method of identifying the relevant people who are involved in the curriculum (Cohen & Manion, 1992:103, Leedy & Ormrod, 2005:206). There was a problem of deciding on the acceptable number of participants in the sample. The critical decision rested on whether to undertake in-depth interviews of few people or, not to give in depth interviews, but rather take a bigger number that would validate the study. In this study the maximum number of interviews recommended for phenomenology, 25, was chosen (Leedy & Ormrod, 2005:114). However in the final preparations for interviews one official declined to be interviewed and another did not keep an appointment. Therefore, only three officials were interviewed instead of five. Yet the number of officials together with instructional leaders interviewed still meets the number of interviewees required to satisfy phenomenology, which is between 5 to 25 interviews (Leedy & Ormrod, 2005:139).

7.10 Direction of Future Research

It is concluded that the research addressed the problem that inspired its undertaking. Why, at the time of writing, in spite of all efforts, instructional leaders were still experiencing difficulties in their interpretation of C2005 guidelines into classroom tasks?

The problem was broken down into the objectives (see section 1.6) that sought to find out the ease and difficulties that instructional leaders find in translating C2005 guidelines to classroom programmes.

The findings which answer the research questions are presented in sections 6.5.4 onwards, incliding conclusions and recommendations from section 7.2 of this research. From the study, the most important areas that should be followed up are: investigating the modalities of participative or collaborative education policy discussion. How does the DoE involve instructional leaders appropriately in policy discussions and support them so that they buy into education policies and take responsibility for the success of C2005?

One future option is to research into creation of a culture of integrated “top-down” and “bottom-up” as well as quality approach in a conflict and compromise design, development and implementation of C2005.

Specifically, the theoretical issues that have to be addressed in future research projects are: Creation of a quality education culture and context (thinking) that will initially be changed legislatively. This will purposefully create a desirable culture of quality teaching and learning among teachers and learners. Jointly, these will turn schools into learning organisations in SA. A practical quality legislative framework is needed to initiate many changes. However a learning organisation should also change culture – symbols and other cultural traits of C2005. These have to be well

researched and planned within a holistic quality assurance framework similar to the one presented in section 7.7, Fig. 7.7. Moreover the quality culture will continuously solve many problems, at different levels, in the implementation of C2005.

Finally, because instructional leaders cast doubt on the competence of their trainers in C2005, it is necessary that the DoE streamline uniform and of high quality training of trainers and teachers at university level on OBE oriented C2005.

7.11 Conclusion

Chapter 7 concludes all that the research set out to determine. It answers the research questions of what difficulties instructional leaders experience in the translation of C2005 guidelines into classroom programmes. The responses from instructional leadership are presented, analysed and conclusions are drawn appropriately though phenomenology to give an insight into the nature and forms of difficulties that instructional leaders experience in implementing C2005.

Facts and figures together with a description of how instructional leaders understand the difficulties that they experience in their implementation of C2005 were given. While conclusions and recommendations are presented in Chapter 7, it is appropriate to indicate that the officials of the FSDoE are aware of the difficulties that instructional leaders experience. The officials are also aware that it means that the DoE has to intervene with required technical and financial resources and carefully planned timely and holistic guidance. Clarification of difficulties in this research indirectly points at the solutions of identified problems. It is up to officials who are in charge of the implementation of C2005 to take the recommendation and carefully weigh them and use them to make informed decisions.

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Appendices

Appendix A. A letter from the promoter stating that the researcher was a registered research student at the University of the Free State.

Appendix B. A Copy of the letter that was given to the officials of the FSDoE Directorate:Quality Assurance; requesting permission to visit schools.

Appendix C(i). A letter from the FSDoE granting permission to visit schools.

Appendix C(ii). A copy of the letters that were given to officials of the FSDoE and principals; requesting them to participate in the study.

Appendix D. Copies of letters that were given to HoDs and teachers requesting them to participate in the research and answer some questions.

Appendix E. A copy of the first and shorter version of the interview schedule.

Appendix E(i). A copy of the second and detailed interview schedule for the FSDoE officials.

Appendix E(ii). A copy of a detailed interview schedule; that was given to principals.

Appendix E (iii). A copy of a detailed interview schedule; that was given to HoDs.

Appendix E(iv). A copy of a detailed interview schedule; that was given to teachers.

Appendix F. A copy of transcripts of the responses to all questions.

APPENDIX A

DIE UNIVERSITEIT VAN DIE ORANJE-VRYSTAAT
THE UNIVERSITY OF THE ORANGE FREE STATE

Fakulteit Geesteswetenskappe
Skool vir Opvoedkunde

Faculty of the Humanities
School of Education

339 BLOEMFONTEIN 9300
REPUBLIEK VAN SUID-AFRIKA
REPUBLIC OF SOUTH AFRICA

(051) 401 2293
FAKS/FAX: (051) 448 0363

DEPARTEMENT KURRIKULUMSTUDIE
DEPARTMENT OF CURRICULUM STUDIES

2001-05-02

The Head
Department of Education: Free State

Dear Sir

Mr TE Motaboli is a Ph.D. student in his first year in the department of Curriculum Studies at the University of the Free State. In his research he will focus on the quality assurance of the implementation of Curriculum 2005. It will be highly appreciated if you could grant him permission to conduct interviews with teachers and staff members at Head Office concerning this research.

Yours sincerely

PROF. G.F. DU TOIT
HEAD OF DEPARTMENT

Appendix B

A copy of the letter written to the FSDoE Directorate: Quality Assurance, asking for permission to visit schools

Box 943
LADYBRAND
FREE STATE.

4th February, 2006.

DIRECTORATE: QUALITY ASSURANCE
……..
……..
…….

Dear Sir/Madam

PhD RESEARCH PROJECT: A QUALITY ASSURANCE FRAMEWORK FOR PRINCIPALS, SENIOR STAFF AND TEACHERS TO HELP THEM TO TRANSLATE C2005 GUIDELINES TO LESSONS AND OBTAIN OPTIMUM OUTCOMES IN THE Free State SCHOOLS.

I humbly request your good offices to grant me permission to carry out research through interviews that I plan to administer to the education department officials, management and teachers in selected schools on the issue stated above.

Responses to the interview schedule will be used for research purposes only. Individuals will not be identified and all information will be treated with utmost confidentiality.

The interviews are in English simply to ensure validity and reliability to the responses.

Thank you in advance for your appreciated cooperation and assistance.

TEBOHO MOTABOLI (Mr) email: motabolit@yahoo.com

Appendix Ci

APPENDIX B

FREE STATE PROVINCE

Enquiries : Ms. Gaborone MMA
Reference no. : 16/4/1/6-2006

Tel :(051) 404 8658
Fax :(051) 447 7318

2006-02-21

Mr. T.E. Motaboli
P.O. BOX 943
LADYBRAND
9745

Dear Mr. Motaboli

REGISTRATION OF RESEARCH PROJECT

1. This letter is in reply to your application for the registration of your research project.

2. **Research topic: Instructional leadership and curriculum development of Curriculum 2005/RNCS: A quality assurance perspective.**

3. Your research project has been registered with the Free State Education Department and you may conduct research in the Free State Department of Education under the following conditions:

   3.1 Educators and learners, participate voluntarily in the project.
   3.2 The names of all schools, educators, and learners involved remain confidential.
   3.3 The questionnaires are completed and the interviews are conducted outside normal tuition time.
   3.4 This letter is shown to all participating persons.

4. You are requested to donate a report on this study to the Free State Department of Education. It will be placed in the Education Library, Bloemfontein. It will be appreciated if you would also bring a summary of the report on a computer disc, so that it may be placed on the website of the Department.

5. Once your project is complete, you may be invited to present your findings to the relevant persons in the FS Department of Education. This will increase the possibility of implementing your findings wherever possible.

6. **You are requested to confirm acceptance of the above conditions in writing to:**

   The Head: Education, for attention:
   DIRECTOR : QUALITY ASSURANCE
   Room 401, Syfrets Building
   Private Bag X20565, BLOEMFONTEIN, 9301

We wish you every success with your research.

Yours sincerely

FR SELLO
DIRECTOR : QUALITY ASSURANCE

Appendix C (ii)

Copy of a letter requesting FSDoE and principals to participate in the research

P.O. BOX 943
LADYBRAND
FREE STATE.
20th March 2006.

The Officials of the DoE and Principal
……..
……..

Dear Sir/Madam

PhD RESEARCH PROJECT: A QUALITY ASSURANCE FRAMEWORK FOR PRINCIPALS, SENIOR STAFF AND TEACHERS TO HELP THEM TO TRANSLATE C2005 GUIDELINES INTO PRACTICE AND OBTAIN OPTIMUM OUTCOMES IN THE FREE STATE.

I humbly request your good offices to grant me permission to carry out research through interviews in your school. The research involves the principal and two teachers. Details of the purpose/topic of the research are stated again at the head of the interview schedule.

Responses to the interview schedule will be used for research purposes only. Individuals and the school will not be identified and all information will be treated with utmost confidentiality.

The interviews are in English simply to ensure validity and reliability to the responses.

Thank you in advance for your highly appreciated cooperation and assistance.

TEBOHO MOTABOLI

Appendix D

Copy of letters given to HoDs and Teachers requesting them to participate in the research

P.O. BOX 943
LADYBRAND
FREE STATE.
20th March 2006.

Dear HoD/ Teacher

……..

……..

Dear Sir/Madam

PhD RESEARCH PROJECT: A QUALITY ASSURANCE FRAMEWORK FOR PRINCIPALS, SENIOR STAFF AND TEACHERS TO HELP THEM TO TRANSLATE C2005 GUIDELINES TO LESSONS AND OBTAIN OPTIMUM OUTCOMES IN THE FREE STATE SCHOOLS.

I humbly request your good offices to grant me permission to carry out research through interviews in your school. The research involves the principal and two teachers. Details of the purpose/topic of the research are stated again at the head of the interview schedule.

Responses to the interview schedule will be used for research purposes only. Individuals and the school will not be identified and all information will be treated with utmost confidentiality.

The interviews are in English simply to ensure validity and reliability to the responses.

Thank you in advance for your appreciated cooperation and assistance.

TEBOHO MOTABOLI

Appendix E

A copy of a short version of the interview schedule

The FSDoE officials, principals, HoDs and teachers

You are required to say:

1. With what ease and difficulties principals, HoDs and teachers have translated C2005 guidelines into classrooms lessons (instructional Leadership) scheduling, pacing and delivering C2005.

2. With what ease and difficulties principals, HoDs and teachers have experienced difficulties in their different roles disseminating, implementing and evaluating curriculum development (of C2005) at school level.

3. The extent to which the current quality assurance measures for C2005 adequately and inadequately address the difficulties that instructional leaders have with C2005 development as understood in questions 1 and 2.

4. Whether there is a need to improve the existing quality assurance structures, and design a new collaborative quality assurance framework. Respondents were also asked whether they considered their schools to be learning organisations, whether their schools were prepared to deal with HIV/AIDS and Multiculturalism that also define quality now.

Thanking you for giving some their time to answer some questions.

Teboho Motaboli

Appendix E (I)

April 17th 2006. INTERVIEW SCHEDULE

1.0 To the officials the FSDoE responsible for the implemetation of C2005 guidelines.

Dear Sir/madam,

You are humbly requested to participate in this doctoral research that investigates the ease and difficulties with which instructional leaders have been translating C2005 guidelines into classroom practice. The research contingently aims at strengthening the existing quality assurance structures and developing a teacher informed quality assurance framework. Your views on the issues raised will be treated with utmost confidentiality. It is estimated that the interview will take about 45 minutes.

a. The date and time in which the interview was carried out:……

1.1 Biographical Details

1.1.1 Gender, age and experience

a. Indicate your age and gender details with a tick (√) in the boxes provided below.

	20-25	26-30	31-35	36-40	41-45	46-50	50-
Male							
Female							

b. For how many years have you served in the present position? ……...Yrs

c. What do you consider to be your three topmost responsibilities?

i.

ii.

iii.

1.2.a. Please write down your highest purely academic qualification

……..

b. Write your highest professional training qualification……

1.3 Write down your location of work and your position in the department:

……..

1.4 Instructional Leadership in C2005 at GET

With what ease and difficulties do you think instructional leaders interpret and translate C2005 guidelines to lessons at school level? (That is receiving guidelines, interpreting them, designing lesson plans, delivering lessons and assessing learner performance).

In further details:

- C2005 Review of 2000 claimed that there is inadequate alignment of C2005 guidelines and teachers' interpretations, lessons and outcomes in what learners have learned. Do you agree with the evaluations? If you do, where do you think the discrepancy originates from? If you do not agree explain what you think could have led evaluators to have this impression.
- What have been your individual and collective understanding and meaning of the difficulties related to C2005 guidelines?
- Have LFs trained teachers to master OBE methods underlying C2005? What do you see as difficulties related to the training?
- From your individual and collective point of view with your colleagues, have teachers made a paradigm shift? What is your understanding of the new teacher roles and expectation of being a researcher, counsellor, mentor etc, leadership in design, dissemination, implementation and evaluation of C2005 and their difficulties?
- In your understanding, do instructional leaders co own implementation of C2005? If not, what difficulties do you see in relation to it? What would need change in order for them to buy in and co own it?

1.5 Curriculum Development

- A) i. Did teachers receive adequate training in preparation for implementing C2005?

  ii. Could you rate the training sessions on a four-point scale (from inadequate, 2, Satisfactory, 3 Good, 4 Excellent) in terms of relevance, informativeness, timeliness and sufficiency for C2005 at GET?

  iii. What were the points of emphases in the training that instructional leaders received?
- B) i. How are policy values of integration, redress and quality supposed to bear on the curriculum development in the classroom?

ii. What have been teachers' experiences with the C2005 values of human rights, equity and environmental care?

iii. Do teachers use prescribed values in designing learning outcomes, programmes, learning area statements, assessment standards and assessment in GET?

c.i. How far have these become second nature to teachers' classroom practice?

ii. If they are not second nature to teachers yet, what could be done so that they become second nature to teachers' classroom practice?

1.6 Quality Assurance

a. Have the different quality assurance structures: Integrated Quality Management System (IQMS), Whole School Evaluation, and Umalusi dealt with the difficulties that instructional leaders experience in C2005 delivery in class.

b. What do you think could be done (institutionally and culturally) to improve the DoE's capacity to include assure quality delivery of C2005? How could the DoE obtain feedback from teachers as they design curriculum? Could the knowledge accumulated by other countries (with for example ISO 9000 quality assurance) not help in developing a framework for improving translation of C2005 intentions to excellent learner outcomes?

c. What do you think your office needs to contribute and increase your capacity to develop and obtain excellent performance form learners in C2005 at GET?

1.7 Schools' preparedness to help transformation and an alternative quality assurance framework.

Comment on schools' preparedness to deal with the emergent issues of Multiculturalism and HIV/AIDS that are impacting on quality of education? What is your suggestion in regard to reinforcement of the existing quality assurance structures and the design of an alternative quality assurance framework? In that direction, do you regard the school over which you are in charge as a learning organisation?

Thank you for giving some of your time for the interview/discussion.

Teboho Motaboli

Appendix E (ii)

March 15th 2006. INTERVIEW SCHEDULE

2.0 To the Principals of schools.

a. Name of the school ……

b. The date and time in which the interview was carried out:……

Dear Sir/madam,

You are humbly requested to participate in this doctoral research that investigates the ease and difficulties with which instructional leaders have been translating C2005 guidelines into classroom practice. The research contingently aims at strengthening the existing quality assurance structures and developing a teacher informed quality assurance framework. Your views on the issues raised will be treated with utmost confidentiality. It is estimated that the interview will take about 45 minutes.

2.1 Biographical details

a. Indicate your age and gender details with a tick (√) in the boxes provided below.

	20-25	26-30	31-35	36-40	41-45	46-50	50-
Male							
Female							

b. Please indicate the number of years served in the position……yrs

Give 3 main responsibilities of your position:

I.

ii.

iii.

2.2 Please write down your highest purely academic qualification ……

Write your highest professional training qualification…….

2.3 Write down the location of your work/the area for which you are in charge:

……

2.4 Instructional Leadership in C2005 at GET

With what ease and difficulties do instructional leaders interpret and translate C2005 guidelines to lessons at school level? (That is receiving guidelines, interpreting them, designing lesson plans, delivering lessons and assessing learner performance).

In further details:

- C2005 Review of 2000 claimed that there is insdequate alignment of C2005 guidelines and teachers' interpretations, lessons and outcomes in what learners have learned. Do you agree with the evaluations? If you do, where do you think the discrepancy originates from? If you do not agree explain what you think could have led evaluators to have this impression.
- What have been your individual and collective understanding and meaning of the difficulties related to C2005 guidelines?
- Have LFs trained teachers to master OBE methods underlying C2005? What do you see as difficulties related to the training?
- From your individual and collective point of view with your colleagues, have teachers made a paradigm shift? What is your understanding of the new teacher roles and expectation of being a researcher, counsellor, mentor etc, leadership in design, dissemination, implementation and evaluation of C2005 and their difficulties?
- In your understanding, do instructional leaders co own implementation of C2005? If not, what difficulties do you see in relation to it? What would need change in order for them to buy in and co own it?

2.5 Curriculum Development

- A) i. Did teachers receive adequate training in preparation for implementing C2005?

  ii. Could you rate the training sessions on a four-point scale (from inadequate, 2, Satisfactory, 3 Good, 4 Excellent) in terms of relevance, informativeness, timeliness and sufficiency for C2005 at GET?

  iii. What were the points of emphases in the training that instructional leaders received?
- B) i. How are policy values of integration, redress and quality supposed to bear on the curriculum development in the classroom?

  ii. What have been teachers' experiences with the C2005 values of human rights, equity and environmental care?

  iii. Do teachers use prescribed values in designing learning outcomes, programmes, learning area statements, assessment standards and assessment in GET?

C.i. How far have these become second nature to teachers' classroom practice?

ii. If they are not second nature to teachers yet, what could be done so that they become second nature to teachers' classroom practice?

2.6 Quality Assurance

a. Have the different quality assurance structures: Integrated Quality Management System (IQMS), Whole School Evaluation, and Umalusi dealt with the difficulties that instructional leaders experience in C2005 delivery in class.

b. What do you think could be done (institutionally and culturally) to improve the DoE's capacity to include assure quality delivery of C2005 ? How could the DoE obtain feedback from teachers as they design curriculum? Could the knowledge accumulated by other countries (with for example ISO 9000 quality assurance) not help in developing a framework for improving translation of C2005 intentions to excellent learner outcomes?

c. What do you think you need to contribute and increase your capacity to develop and obtain excellent performance form learners in C2005 at GET?.

2.7 Further comments on the schools' preparedness to help transformation and an alternative quality assurance framework.

What could be done to reinforce the existing quality assurance? Comment on your school as a learning organisation now, its ability to formulate visions of quality and its preparedness to deal with problems of Multiculturalism and HIV/AIDS?

Thank you for giving me some of your time to answer the questions

TEBOHO MOTABOLI

072259929

39 Excelsior St. Clocolan Email: motabolit@yahoo.com

Appendix E (iii)

March 15th 2006. INTERVIEW SCHEDULE

3.0 To the Heads of Departments at school responsible for C2005 policy implementation.

Name of the school ……
The date and time in which the interview was carried out: …….

Dear Sir/madam,
You are humbly requested to participate in this doctoral research that investigates the ease and difficulties with which instructional leaders have been translating C2005 guidelines into classroom practice. The research contingently aims at strengthening the existing quality assurance structures and developing a teacher informed quality assurance framework. Your views on the issues raised will be treated with utmost confidentiality. It is estimated that the interview will take about 45 minutes.

a. Indicate your age and gender details with a tick (√) in the boxes provided below.

	20-25	26-30	31-35	36-40	41-45	46-50	50-
Male							
Female							

3.1 For how many years have you served in the present position? ……...Years
3.1.1 Can you list what you consider to be your three main responsibilities?
a.
b.
c.

3.2 Please write down your last purely academic qualifications. …….
Write down your last purely professional qualification……..

3.3 Location of work …… and type of school: (Urban, Township, rural, Farm/ Deep rural) (please tick appropriate)

3.4 Instructional Leadership

With what ease and difficulties do instructional leaders interpret and translate C2005 guidelines to lessons at school level? (That is receiving guidelines, interpreting them, designing lesson plans, delivering lessons and assessing learner performance).

In further details:

- C2005 Review of 2000 claimed that there is insdequate alignment of C2005 guidelines and teachers' interpretations, lessons and outcomes in what learners have learned. Do you agree with the evaluations? If you do, where do you think the discrepancy originates from? If you do not agree explain what you think could have led evaluators to have this impression.
- What have been your individual and collective understanding and meaning of the difficulties related to C2005 guidelines?
- Have LFs trained teachers to master OBE methods underlying C2005? What do you see as difficulties related to the training?
- From your individual and collective point of view with your colleagues, have teachers made a paradigm shift? What is your understanding of the new teacher roles and expectation of being a researcher, counsellor, mentor etc, leadership in design, dissemination, implementation and evaluation of C2005 and their difficulties?
- In your understanding, do instructional leaders co own implementation of C2005? If not, what difficulties do you see in relation to it? What would need to change in order for them to buy in and co own it?

3.5 Curriculum Development

Whith what ease and difficulties are instructional leaders designing and implementing C2005?

- A) i. Did teachers receive adequate training in preparation for implementing C2005?

  ii. Could you rate the training sessions on a four-point scale (from inadequate, 2, Satisfactory, 3 Good, 4 Excellent) in terms of relevance, informativeness, timeliness and sufficiency for C2005 at GET?

  iii. What were the points of emphases in the training that instructional leaders received?
- B) i. How are policy values of integration, redress and quality supposed to bear on the curriculum development in the classroom?

  ii. What have been teachers' experiences with the C2005 values of human rights, equity and environmental care?

iii. Do teachers use prescribed values in designing learning outcomes, programmes, learning area statements, assessment standards and assessment in GET?

c.i. How far have these become second nature to teachers' classroom practice?

ii. If they are not second nature to teachers yet, what could be done so that they become second nature to teachers' classroom practice?

3.6 Quality Assurance

a. With what ease and difficulties have the different quality assurance structures: Integrated Quality Management System (IQMS), Whole School Evaluation, and Umalusi dealt with the difficulties that instructional leaders experience in C2005 delivery in class

b. What do you think could be done (institutionally and culturally) to improve the DoE's capacity to include assure quality delivery of C2005 ? How could the DoE obtain feedback from teachers as they design curriculum?

Could the knowledge accumulated by other countrie(with for example ISO 9000 quality assurance) not help in developing a framework for improving translation of C2005 intentions to excellent learner outcomes?

c. What do you think you need to contribute and increase your capacity to develop and obtain excellent performance form learners in C2005 at GET?.

3.7 Further comments on the schools' preparedness to help transformation and an alternative quality assurance framework.

What could be done to reinforce the existing quality assurance? Comment on the your school as a learning organisation now, its ability to formulate visions of quality and its preparedness to deal with problems of Multiculturalism and HIV/AIDS?

Thank you for giving me some of your time to answer the questions

Thank you for giving me some of your time to answer the questions.

TEBOHO MOTABOLI 13 Exelsior St. Clocolan
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Appendix E (iv)

March 15th 2006. INTERVIEW SCHEDULE

4.0 Questions for teachers based on their responsibility for C2005 policy implementation at school level.

Dear Sir/madam,

You are humbly requested to participate in this doctoral research that investigates the ease and difficulties with which instructional leaders have been translating C2005 guidelines into classroom practice. The research contingently aims at strengthening the existing quality assurance structures and developing a teacher informed quality assurance framework. Your views on the issues raised will be treated with utmost confidentiality. It is estimated that the interview will take about 45 minutes.

a. Name of the school:……..

b. The date and time in which the interview was carried out:……

c. Medium of instruction of the school…….

4.1 a. Indicate your age and gender details with a tick (√) in the boxes provided below.

	20-25	26-30	31-35	36-40	41-45	46-50	50-
Male							
Female							

b. Could you write down the number of years you have served in your present position? ……. . Yrs

4.2 a. What was the highest purely academic qualification?……

b. Your highest purely professional qualification……..

4.3 In which administrative district are you based?

……

4.4 Instructional Leadership

With what ease and difficulties do instructional leaders interpret and translate C2005 guidelines to lessons at school level? (That is receiving guidelines,

interpreting them designing lesson plans, delivering lessons and assessing learner performance).

In further details:

- C2005 Review of 2000 claimed that there is insdequate alignment of C2005 guidelines and teachers' interpretations, lessons and outcomes in what learners have learned. Do you agree with the evaluations? If you do, where do you think the discrepancy originates from? If you do not agree explain what you think could have led evaluators to have this impression.
- What have been your individual and collective understanding and meaning of the difficulties related to C2005 guidelines?
- Have LFs trained teachers to master OBE methods underlying C2005? What do you see as difficulties related to the training?
- From your individual and collective point of view with your colleagues, have teachers made a paradigm shift? What is your understanding of the new teacher roles and expectation of being a researcher, counsellor, mentor etc, leadership in design, dissemination, implementation and evaluation of C2005 and their difficulties?
- In your understanding, do instructional leaders co own implementation of C2005? If not, what difficulties do you see in relation to it? What would need to change in order for them to buy in and co own it?

Curriculum development

With what ease and difficulties have instructional leaders designed and implemented C2005?

- A) i. Did teachers receive adequate training in preparation for implementing C2005?

  ii. Could you rate the training sessions on a four-point scale (from inadequate, 2, Satisfactory, 3 Good, 4 Excellent) in terms of relevance, informativeness, timeliness and sufficiency for C2005 at GET?

  iii. What were the points of emphases in the training that instructional leaders received?
- B) i. How are policy values of integration, redress and quality supposed to bear on the curriculum development in the classroom?

  ii. What have been teachers' experiences with the C2005 values of human rights, equity and environmental care?

  iii. Do teachers use prescribed values in designing learning outcomes, programmes, learning area statements, assessment standards and assessment in GET?

c.i. How far have these become second nature to teachers' classroom practice?

ii. If they are not second nature to teachers yet, what could be done so that they become second nature to teachers' classroom practice?

4.6 Quality Assurance

a. Have the different quality assurance structures: Integrated Quality Management System (IQMS), Whole School Evaluation, and Umalusi dealt with the difficulties that instructional leaders experience in C2005 delivery in class?

b. What do you think could be done (institutionally and culturally) to improve the DoE's capacity to include assure quality delivery of C2005 ? How could the DoE obtain feedback from teachers as they design curriculum? Could the knowledge accumulated by other countries (with for example ISO 9000 quality assurance) not help in developing a framework for improving translation of C2005 intentions to excellent learner outcomes?

c. What do you think you need to contribute and increase your capacity to develop and obtain excellent performance form learners in C2005 at GET?

4.7 Further comments on the schools' preparedness to help transformation and an alternative quality assurance framework.

What could be done to reinforce the existing quality assurance? Comment on the school as a learning organisation now, its ability to formulate visions of quality and its preparedness to deal with problems of Multiculturalism and HIV/AIDS?

Thank you for giving me some of your time to answer the questions

Thank you for your giving me some of your time to answer the questions.

TEBOHO MOTABOLI No13 Exelsior St. Clocolan 072299529 Email: motabolit@yahoo.com

Appendix F

Transcripts

TRANSCRIPTS OF PILOT INTERVIEWS

PILOT

School: N 3

Participant: Teacher - Female – 45 years

Head of Department

The following points were made and noted about the schedule and content.

- The interview lasted from 5.00 pm to 6.00pm
- The schedule needed structure
- I got the first practice to write and record time at intervals. The timing was difficult so I chose to number statements.

Remarks on the content of the interview schedule

1. Interviewees: strictly wanted to give little time, as they are busy with other many obligations. They could only spare a short amount of time at the end of the instructional time – 1:00 to 2:00p.m.
2. Since many of them stay far from school they were tired and needed to go home to family responsibilities after school.
3. The content was their concern and accurate as it touched on their duties towards teaching and learning which was not going on well according to the interviewee.
4. If the interview is longer than 30 minutes, it is too long and teachers would avoid it if they could
5. Responsibilities (3 main)
    - Delegation of duties
    - Support for staff
    - Instructional leadership

Instructional Leadership

6. Views on discrepancy between what guidelines intended and outcomes – which are undeniably poor are

- Too many learners in class causing them inefficient teaching programmes and group and project work.
- There is need for Human Resources approach (from provincial and district levels).
- More buildings.
- More OBE trained teachers.
- LFs support boosted.

Curriculum Development

7. Streamlining and strengthening C2005 into RNCS has helped somewhat.
8. Among the grave limitations of RNCS are: there is too much administrative paper work, which teachers have to deal with.
9. Training has not solved the problems. Workshops are too short and give limited information.

Quality Assurance

10. LFs are insufficient – too few with limited knowledge to deal sufficiently with the many teachers and varied problems in the province.
11. Among the solutions to training needs are cluster training sessions.
12. The trainers need to be receptive to teachers' complaints and these should be addressed promptly.
13. LFs are available most of the time.

CODED TRANSCRIPTS OF INTERVIEWS

Interviews done on 20th April 2006

Responses Transcribed – 17th July 2006

Respondent 1

Official of the DoE

Answers to questions on

Instructional Leadership

1. Principal and teachers still have misunderstanding of principles of NCS.
2. They lack day to day practice
3. They are technically practising RNCS
4. They do not correlate teaching to assessment standards.
5. They need more training and clarification but, LFs are few and overloaded..
6. They need training on interpretation.
7. They need examples and follow up on how to translate guidelines into outcomes. They also need examples of assessment standards and how to apply them.
8. Instruction leaders must be interpreters. The confusion on the part of teachers to appropriately interpret C2005 guidelines as they are intended means that their training has not been enough. Training during holidays is accepted with hard feelings.
9. Instructional leaders need to be lifelong learners themselves
10. To make things easier instructional leaders need to aim at mastery of C2005. They should take courses even when there are no monetary rewards.

11. FDoE should also encourage school personnel to accept changes wholeheartedly. To train in the interpretation of C2005 and lifelong learning.

12. Ratio of Learning Facilitators (LFs) to the number of schools is high. Their work is too much as it includes visiting schools and examinations. So they have little time to make a follow up. There is an agreement on the point of the length of time that the LFs need to do their training work properly. A bigger budget is needed to employ more LFs and train them thoroughly.

Curriculum Development

13. When their numbers are higher and there is more time, the LFs can be trusted to take feedback from schools to the department of education. They are receptive to the problems of teachers.

14. LFs are experts in their own fields but schools differ from place to place in context – education population and their capacity. A larger amount of money is needed to employ more LFs and train them well.

15. For quality delivery of C2005 – officials employed by government need to also give their best.

16. The FSDoE should make co-ordination and support constant and shorter courses provided to enable teachers to make sense of changes and change things when there is need.

Quality Assurance

17. Disciplined work needs Quality Assurance department to do its work – the department has to make many visits to schools, communicate with schools and solve problems.

`18.The whole DoE has to take up research findings from the field seriously and implement them.

19. While quality assurance in SA should have a local flair we want to be competent and compare with the wider world so systems of Quality Management such as 1S0 9000 are helpful and should give an input in quality culture – so that we can graduate people that we would trust are world class high quality performers.
20. School level measures of quality assurance should learn and rely on University Quality Assurance.
21. The Department of Education has already dealt with Multiculturalism and HIV/AIDS with the programme Tirisano.

Respondent 2

Official of the DoE

Interviewed 24 April 2006

Responses to questions about:

Instructional Leadership.

1. RNCS (2005) was rushed so there was no budget for many of its requirements. e.g. travel, accommodation, catering materials.
2. School Principals were not included in training for 2005 but RNCS has included them. (But if there is suspicion of commitment), it needs addressing immediately. Teachers continue misunderstanding C2005.

3. There has to be public confidence that we obtain or give what the public wants.
4. Compared to other countries – we in SA are not alone with the problems. A Belgian that I talked with said they have problems even after 20 years of OBE. They have seen learners not taking responsibility for learning.
5. What is needed is to excite learners in C2005 implementation.
6. There is too much negativism among parents.

Curriculum Development

7. Teachers do not seem to have a belief in what they are teaching. They have not been bought on board and don't see goodness in identifying with C2005. If teachers are not too happy then they will achieve little.
8. HIV has been addressed through Tirisano. From the constitution there is E-learning and these need management and infusion into the curriculum.
9. Learning Outcomes include orientation and some courses. There are 2 people dealing with values – in the district these are being brought into the classroom.

Quality Assurance

10. QA is a different directorate – but we try to monitor WSE and to monitor training.
11. But LFs and WSE officials are too few and need their numbers increased.
12. Principals are the 1st line for QA and must show results, progression, report promotion – when these are authentic they give the process of change legitimacy.
13. Otherwise training manuals formerly under the care of Mr d'Olivera have always been a changing factor. They are of such quality even other provinces have adopted them.
14. Do we compare with the world in the quality of our graduates? – At the University level yes we compare; at lower school level we have had Scottish and Tanzanian Benchmarks but our main problem (in assessment) is how many people drop out.
15. In schools in South East Asia for example, teachers are autocratic they are trusted. UK has national and expert attempts at OBE.
16. To complete we have to assess continuously and give graduates trust that what they get is high quality.

17. But I remember that years back in Pretoria we decided in 1995 that OBE in SA would be a SA product for SA conditions. We have not reached where we are going where it's satisfactory.
18. Other acknowledged problems are: class sizes, LSMs and there are too few LFs to do the work e.g. of class observation.
19. Promotion of culture of learning has been taking place – punctuality, eradication of absenteeism. We are holistic and even invite corporations to come in to help.

Respondent 3

Official of the DoE

ANALYSIS 16 MAY 2006

Instructional Leadership and

The official elaborated on how C2005 design teams work. She also said that "instructional leaders should understand the issues I mentioned about C2005 as difficulties are related to them".

1. I participated in designing indicators for C2005 with experts from Africa and beyond.
2. Instructional leadership fits with school level indicators
3. In terms of structure – school has the following to deliver C2005 adequately:
   Different Phases
   Learning Outcomes
   Learning Areas – Instructional leadership contributes to professional working groups of different phases and Learning areas.

Curriculum Development

4. There were over 600 outcomes. For quality assessment they were trimmed to 26.
5. With indicators unpacked, WSE was designed with 90 indicators; one of the indicators is curriculum.

Prod: With what ease and difficulties did you design curriculum and assure quality of the work?

6. Through reflective practice, monitoring action plan. Reports are written in the minutes and given to School Management Team (SMT).
7. LFs come to school and consult minutes showing progress and cohesion.
8. LFs create cluster sessions that detect problems in the process of training.
9. LFs work is cyclical and systematic – problem solving manner in which they always get closer to the problem.
10. National level has many areas to focus on concerned with framework. At this level there are 90 performance areas and 26 indicators.

Quality Assurance

11. For Quality Assurance – there is directorate under the Director of Systematic Evaluation and the officer in charge – Systemic Evaluation. What is more or less coordinated is that indicators in the department take the form of:
    Context – Legal and policy issues
    Inputs – Teachers' facilities
    Process – actual learning
    Outcomes – dropout/pass rate.
12. QA is developmental and not judgemental as in the past.
13. In practice teachers find it very hard to make a paradigm shift. They teach the way they were taught.
14. At National level there's even IQMS – that has to be developed nationally for control and uniformity.
15. Details of IQMS – see documents and officers e.g. the Deputy Director General DDG who attends national level meetings as a.
16. RNCS improved (C2005 weaknesses) which included looking at Teacher's needs, structured assessment standards and interpretation.
17. Review followed political changes (when Prof Asmal came to the department) and in-built revision was provided. This education policy has always been improved upon by political developments.
18. Progression was also a quality assurance measure.
19. The main problem may be how to assure quality in transformation.
20. One way is to look at consensus and specific process through a reflective process.

21. For systematic evaluation you can get indicators from the Ofiicer in charge, Systemic Evaluation, Diretorate: Quality Assurrance.

PRINCIPALS From: Respondent 4

School N6

Instructional Leadership

Comment on the ease and/difficulty with which teachers are implementing C2005.

1. The FSDoE has left us with the LFs only. They are the only ones close to us in schools. They do take views of the schools to the department (or so they promise).
2. Their work culture – are they democratic and approachable? Most are good in that sense of being approachable – about 20-30% are autocratic – these are disliked by teachers.
   How can the problem of autocracy be solved?
3. The DoE should bring training to teachers – give them hands on training.

Curriculum Development

How easy or difficult do teachers find translation/ interpretation of policy and guidelines?

4. Streamlining and strengthening has increased clarity of curriculum for school level design. But because it is new it has problems.
5. Training sessions are too short at 3-5 days. 3-6 months would be more adequate and remove confusion.
6. Principals training sessions are too short.
7. The training also takes the form of impositions of unclear new things.
8. There was a rush to introduce changes.
9. Consultation would have allowed teaches to buy into the C2005 and co-own it.
10. Now there is even resistance to deal with.

Quality Assurance

Comment on quality assurance of C2005.

11. C2005 and successive versions are too experimental and lack what I see as standardisation. It is open to too many changes. For example the exams that were intended for Grade 9 in 2002 were scrapped last minute without giving any explanations to schools.

Are Quality Assurance bodies working?

12. QA personnel of the DoE come to school and go without understanding the difficulty of work of teachers.

What can be done to improve quality of C2005 outcomes?

13. Addressing all the collaborative issues mentioned.

Have you got policies to deal with Lifelong Learning, multiculturalism and HIV/AIDS?

14. HIV yes and there's a lot of training in and out of school.
15. Multiculturalism is only encouraged in recognising all language groups of SA. Our school is almost entirely Sotho in population.
16. The school is a learning school – it sends many teachers on courses to develop themselves and the school.

Respondent 5

School N1

Principal

Instructional Leadership

With what ease and difficulties are teachers implementing C2005**?**

1. There is too much emphasis on assessment and also of some aspects – and I am happy to see assessment of all aspects of learning.
2. There are too heavy demands on teachers – too much elaboration on administrative work takes away the teachers' time to other areas.
3. Teachers collaborate with some officials of the FSDoE but not with others as they differ in knowledge and understanding of C2005.
4. Competent people in the cascade model would make C2005 succeed.

Curriculum Development

5. I see the source of problems in design intentions and outcomes and lack of experience/difficulties and motivation of trainers.

6. Teachers face many learners in the classroom. They can hardly fulfil the specific needs in programming.

Quality Assurance

7. IQMS has been established in our school and is working
8. I regard our school as a Learning organisation
9. Multiculturalism and HIV? Yes we are multicultural and cater for all groups in our school.
10. There is a policy on HIV/AIDS

Respondent 6

School N2.

Principal

Instructional Leadership

With what ease and difficulties do teachers implement C2005?

1. I don't think there is enough grassroots level collaboration or working together between teachers, the school by FSDoE.
2. Streamlining and strengthening of C2005 has helped, but there is still not enough cultural emphasis on change (i.e. history of black groups).
3. Understanding the economic problems or status of children and their parents does help to understand learners' problems.
4. There is not enough grassroots input and space left for such input.

Prod: Comment on instructional leadership of teachers.

5. It is from school that leadership is not keeping up.
6. Training is taking place but it is not having desired impact. There are too rapid changes.
7. Teachers and school management personnel are frustrated.
8. School principal and SMT have to act and take management crises to DoE.

Curriculum Development

9. The principles of OBE become clear but still it is imposed and there is no grassroots input by teachers.

10. Rapid changes make most materials such as textbooks obsolete – this emphasises how frustrated teachers are.
11. The many changes also give some teachers a chance to undermine the new system.
12. Major cause of problems of teaching is lack of skills to implement C2005.
13. Language training has not been enough.
14. There is now also resistance – resulting from fear of unknown.
15. LFs are doing well – but changes are so rapid that they don't alter.
16. The rate of changes has led to overload of teaching tasks for teachers to the extent that there is now a high staff turnover. Many teachers can't have extra-curriculum activities such as school trips, exams, marking.

    Culture of work of LF's
17. Most LFs are teacher friendly – they can even shorten training time.

Quality Assurance

Are Quality Assurance bodies; IQMS, WSE, PMS and DAS working well?

18. IQMS has a very unwieldy bureaucracy, WSE is better and encourages working by teachers to achieve NCS goal.
19. Insufficient emphasis is being put on problems. WSE looks at teaching. They need to give feedback on problems they find and indicate what solutions are being planned. E.g. low eduation level of parents in the homes of learners means little support for on going work. Facilities to some problems e.g. home cannot be addressed in short term – in this regard we would be on track to start doing something about them.
20. Time and cultures about change easily so that maybe children who are growing up now will grow within and be used/accept the changes.
21. This situation could improve if DoE listened to teachers and try to create a culture of participation/collaboration.
22. Learning by learners also has to be taken back to the basics – 3RS.

Prod; Is your school a learning organisation prepared to handle multiculturalism and HIV/AIDS?

23. Yes, there are many chances given to teachers for training (the school has a programme) Even now 14 teachers are training.
24. On HIV/AIDS there is a phobia and even a psychologist to counsel all.
25. There are national traditional days to recognise different cultures.
26. The identity and status of a teacher has been eroded over time by children's' rights. Inclusive of C2005 they have taken away the authority of the teacher to make decisions.
27. There is no allure to teach (attraction) Government will have to look into this matter again.
28. In school N4 the internal culture of the school. There is a common spirit of identity of all staff, with the freedom of association (No one is forced to hang out with anyone). Individual rights of a teacher are protected.

Respondent 7

School N4

Principal

Instructional Leadership

Comment on ease as difficulty of Teachers implementation of C2005.

1. I still find problems – I think it is because training is inadequate – I have problems as a facilitator for teachers. Their trainers are not sufficiently trained themselves.
2. The source of the problems should be found in the hurried pace of NCS – which has then resulted in mistakes.
3. Workshops are organised in holidays. Teachers feel bad losing breaks, lose enthusiasm and work poorly.
4. Training is done poorly by trainers who may be do not know much either.
5. The time given for training of 3 days and more or less 5 is not enough.

Training: Institutions and people their culture of work, are they teacher friendly

Curriculum Development

6. DoE and LFs training are good in essence but not in content.
7. As all of us are learning we can do with strategies built upon research on the NCS.
8. Whenever I come from training I feel confused and empty. The sessions do not clarify issues more.
9. Options could include taking teachers and training them to the level of expert/mastery. These might disseminate information better.
10. Training is inadequate in terms of time and is done by people who do not know very much either.
11. There is clear disadvantage in the rush in implementation of NCS.
12. The general feeling of faculty through is that C2005 is the best option in the circumstances. But that it is not done well and as a consequence it can even change views of teachers negatively. Delivery should be improved.

    Comment on quality assurance in your school, your school as a learning organisation with developing the capacity to earn more

    l and cope with multiculturalism and HIV/AIDS.
13. Yes the school is a learning organisation as there is a programme of training and sharing of knowledge. There is no HIV policy but a robust programme of educating learners on HIV. Parents are brought in. We instil culture of hope and respect for the environment. We invite speakers to address us all and we are ready to face changes.

Prod: Do you feel there is a culture that is in line with OBE?

14. Yes – there are teamwork. Cooperation and some learner – centred teaching which symbolise OBE/NCS in our school.
15. Communication and change of people who deal with OBE/NCS breaks continuity.
16. We in the school may benefit more from private non-governmental groups and people.

17. In the beginning I was scared and felt that I was losing professional authority but following an assessor's course I feel empowered and brave and more assured.
18. Learners are not taking responsibility as such but the expectation is that once teachers lead learners will follow.

Quality Assurance

Comment on the efficiency and cultural change.

19. IQMS is functioning – I monitor the Deputy Principal and he monitors teachers in a chain of command and we implement local recommendations.

Respondent 8

School N5.

Principal

Interviewed 25 May 2006

Instructional Leadership.

Q. With what ease and/or difficulty are teachers in implementing C2005 in the classroom?

1. My view is that teachers have found many difficulties because they concentrated on paradigm shift and neglected other many responsibilities of staff, which are many.
2. There is little focus on principles even though they make the school to run. There has been a bigger focus on teachers.
3. I believe the FSDoE should invoke principals earlier than they design for example has a committee of principals to help.
4. Also principals need to be freed from teaching so that they can concentrate on supporting implementation of curriculum.
5. Meetings of principals with the department DoE personnel would help give principals more direction of the C2005.
6. The DoE seems to trust LFs so much they stay away from schools.
7. The DoE should budget more money for LFs committees and their numbers and work.

8. At the moment LFs do not seem to have expertise and authority when challenged they read from the book.
9. Training now is compliance oriented and develops into instruction handover. Talk shop.

Curriculum Development

10. In terms of both instructional leadership and curriculum development. LFs prefer groups and give generic + practical training. They should demonstrate how to implement and strategies in the classrooms.
11. Teachers have not seen microteaching of OBE/C2005 and need to have the experience – demonstration and on the job action.
12. The new values of learner – centeredness require demonstration and support if teachers are not to go back to what has been normal teacher centeredness.
13. Institutions of government and their culture are falling short of supporting C2005. Communication is poor. Problems include selection of materials. Organising groups – tasks (some of which have even come late like CTAs). Assessment feedback and recording – portfolios.
14. Have learners/teachers led learners to take responsibility for their learning – no.
15. Teachers need training to induce learner response that would help achieve outcomes.

Quality Assurance

16. Major problems hindering successful implementation are: big classes capacity of teachers, poor principal support now as they are also engaged in learning.

Comment on the work of Quality Assurance structures: IQMS WSE, DAS, PEMS.

17. IQMS and its agencies are making schools aware of what they have to achieve but there are too many challenges – too much work.
18. IQMS is good but those involved in it have many things demanding their time. Administration work in stretching them to the point of burn out.
19. Comment on your school as a learning organisation, and its preparations to cope with multiculturalism and HIV/AIDS.

20. The school can be regarded as a learning organisation as it has an inset programme and change management.
21. There is a committee for HIV/AIDS information /education. Its multiculturalism in which there are more differences among groups – but the school promotes respect for all.

Respondent 9

School N2

Head of Department

Instructional Leadership

1. My feeling is that implementation of C2005 should be done correctly and monitored properly at GET Senior phase.
2. Monitoring properly would help the DoE to see whether the aims of C2005 have been achieved and material resources used properly.
3. Changing curriculum takes time. People take time to accept change. This is one important factor to take into account.
4. On going training of school personnel from principal to teachers has helped them to understand content that needs instructing.
5. But training has not been complete.
6. Much more can be done in terms of training – yet I don't think there can be any quality assurance method to pre-empt problems.
7. The efficiency of training could be rated 2 on a scale where 1 is poor, 2 average, 3 good, and 4 excellent.

Curriculum Development

8. C2005 designers have to take teachers subject specific concerns, which include assessment standards into account.
9. In terms of training teachers on how to schedule, pace assign and evaluate work, we need more learning facilitators; more information in schools.
10. I feel that there are insufficient resources such so even facilitators find it difficult to cope with C2005 guidelines. It is even harder for Heads of Department to help LFs.

11. The organisation of C2005 for implementation must assure a tripod structure and involve:
    Parents
    Teachers and trainers
    Learners
12. The whole nation has to change the mind set also.
13. Regarding career options, these must be included in learners' instruction to guide them.

Quality Assurance

14. In regard to quality assurance, there has to be excellent cadre of highly knowledgeable trainers to give the IQMS values in ithe eyes of teachers.
15. My school is a learning organisation because we have training programmes for staff on an on going basis. We also bring motivational speakers at times to speak to staff.
16. The school has a multi-cultural community and respects each person's culture. But there freedom of association.
17. There is a policy on HIV/AIDS and a psychologist.
18. Overall my assessment is that C2005 could be empowering to teachers if the community understood and appreciated the role of teachers.
19. The culture of learning has been restored – this is no longer any lateness and teachers are enthusiastic.
20. About learners – they do not take any responsibility for their learning at lower grades – they take some responsibility at grades 10-12 not below.

Respondent 10

School N1

Position: Head of Department

3 most important responsibilities:

a) Teaching
b) Academic Administration
c) Sports coaching and Administration

Instruction Leadership

1. I have not examined all the documents of OBE
2. I have been to the latest training I may have some gaps (sometimes teachers miss things).
3. I am a grade 8 teacher (preparing learners for grade 9).
4. Streamlining and strengthening, has it achieved desirable ends? It has not or partially because outcomes are too broad and need details (e.g. syllabus had stages and was progressive).
5. C2005 has to be more specific from one grade to another.
6. DoE training sessions have been worthwhile.
7. But they have not given teachers something to go away with and implement.
8. Training has given generic skills and explanations (e.g. white papers/green etc.) and not what learners need.
9. In terms of relevance/sufficiency I have the sessions as inadequate.
10. Training should be more learners directed and classroom oriented.
11. This curriculum should not undermine the fact that the teachers' duty is training the child.

Curriculum Development

12. Institutional arrangements are not good LFs are far away and do not know what is happening or what decision-makers are faced with at school.
13. Decisions are top-to-bottom – there is no bottom-up input.
14. Decisions are not practical for teachers consequently teachers do not feel they co-own the process.
15. What could improve issues/implementation is listening to teachers.
16. Even where there is resistance there is need to draw strategies again and involve teachers.

Quality Assurance

17. Even though they don't have such indepth knowledge of OBE, LFs give much potential of training for implementation of OBE – at all levels.
18. Involvement of parents in helping in education facilitation should not mean duplication even where there is an overlapping.
19. This school(School N5) can be regarded as a learning school/organisation many teachers go on courses and it is adjusting and there is a lot of preparedness.
    - There is accommodation of languages and religion.

- This school has a positive progress – as there are teachers who have stayed long and younger ones coming and are handling change and life long – learning becomes a reality.

OBE has eroded teachers' pride and independent thinking with group work.

Respondent 11

School N6.

Position: Head of Department

3 Most important responsibilities: - control of teachers

- Delegation of duties to teachers
- Organisation of teaching

Instructional Leadership

1. In regard to OBE I am the Head of Department for OBE – I find a lot of negative sentiments among teachers.
2. Teachers find and report that there is too much paper and administrative work in OBE. To report for many learners.
3. Teacher training was too short to empower teachers.
4. Learning facilitators also come with different demands e.g. learning outcomes and learning assessment.
5. We need highly trained (and selected) people to come and empower teachers. Those that are working at present could discourage teachers.
6. Paradigm shift and child-centeredness works in some topics like Life Orientation, those dealing figures e.g. Mathematics and Science.
7. Besides learning facilitators I think knowledgeable lecturers could also help in bringing knowledge to school.

Curriculum Development

8. I find that the other problem is that OBE is complex for some teachers who are even considering leaving.
9. Others are in trouble with movement from one level to another.
10. Teachers were not trained to teach in the OBE way (method).
11. Knowledgeable/instructors are needed to train teachers.
12. Guidelines have been timed and have been sufficient.
13. But main problems remain in other forms such as ignorance about OBE guidelines.
14. Teachers at times have no interest in explanations.
15. The results however are loss of authority and confidence for teachers.

16. It is also necessary for the DoE to involve teachers in C2005 policy discussions and not have teachers as representative because they have another task.

Quality Assurance

17. The most important measures that could improve the work of teachers are knowledgeable trainers – and continued training of teachers.
18. My assessment of the C2005 work and its future is that it will fail eventually.
19. C2005 failure will prejudice learners a lot.
20. As an example – learners who wrote Matric this past year, 2005 from OBE did very poorly. Even those who passed have problems at universities.
21. I regard my school as a learning organisation – because it has a policy for continued learning by teachers.
22. There are policies to deal with respecting all cultures
23. C2005 has added value to teachers identity on the one hand – on the other hand it has created uncertainty for teachers, but they struggle on

Respondent 12

School N3

Position: Head of Department

3 most important responsibilities

- Assisting the principal
- Monitoring academic progress
- Motivate and assist teachers & learners

Instructional Leadership

1. Teachers are still facing problems e.g. physical discipline problems related to resources.
2. NCS has no specialists who could have instructed and supported Art and culture promotion of change.
3. I am of the opinion though that the DoE is doing the best it can in the circumstances.

4. Guidelines for implementing OBE in class are not specific. They should show how to go about implementing lesson schedules in class.
5. There are also limited resources to address too many tasks.
6. Teachers need more training in implementingC2005.
7. Designers should take teachers experience on board when they design C2005.
8. Yes some teachers have made a paradigm shift and belief change in their teaching in class.
9. Other teachers, especially older ones insist that OBE and all that it brings are different and show resistance.

Curriculum Development

10. A common view about C2005 among teachers is that OBE driven C2005 is all right it is a good choice.
11. But interpretations of C2005 are many so even those saying it is good may interpret C2005 in their own way.
12. The solution to passing curriculum 2005 to schools may be to have a joint – in situation/location meetings to ensure a common approach.
13. Learning facilitators help a lot in transferring C2005 guidelines to schools.
14. But LFs work and ethos and culture of work is not helping teachers.
15. LFs need training so that they do not come to monitor only by asking what teachers have been doing – it is necessary that they show how to do the work in class.
16. LFs approach (when undemocratic) has promoted hard feelings among teachers.
17. The C2005 requirements and values that are to be included such as human rights or being facilitators are hard to strictly implement but teachers have a wide scope to work in.
18. Learners at the moment are confused and wonder what is happening.
19. In terms of curriculum development of C2005 my school is still employing specific outcomes and old books. Maybe they will change next year.

Quality Assurance

20. Yes IQMS is doing a great job making teachers appreciate quality work. Develop quality OBE methods.
21. They are teacher friendly and on occasion they have brought motivational speakers.
22. My school is a learning organisation because it has many on-going courses, which are attended by staff – this also confirms the school commitment to lifelong learning.
23. The school has a policy for dealing with multiculturalism and HIV/AIDS
24. Even inclusive education has led to adjustments in the school to allow people on wheelchairs to move easily on the school compound.

Respondent 13

School N8

Position: Head of Department

What he considers the 3 most important Responsibilities:

- Make sure that learners are reached
- Encourage union participation by teachers
- Give that teacher's work is recognised.

Instructional Leadership

1. For me the problem is that the new OBE way may differ a little with how I teach for example, I would prefer to teach a language component separately and the new method makes it a joint whole.
2. The guidelines help, but learners have a problem grasping the direction.
3. At times I think that guidelines give an impression that learners know. This is not the case, they don't know.
4. Lesson schedule are determined by the guidelines. Teachers do not have much flexibility to design lessons – programmes out of the guidelines, as LFs could not approve.

5. Guidelines have accurately pitched learning requirements at the correct level for learners.
6. Learners do not take responsibility for their learning e.g. when they are given work to do at home; most learners give the work to someone to do it for them.
7. Parents do not understand new OBE shared learning and their role to help learners with homework – parents think that teachers are not doing enough and pass work to parents.
8. Group work in many cases allows award of marks to non-participants in class and homework tasks.
9. A consequence of non-participants by some learners is that they are remaining behind in learning.
10. Owing to limited resources, teachers and HoDs training sessions were too short – maybe LFs had longer.
11. LFs expect implementation and success even though they know that training was inadequate.
12. However learning support materials are usually on time.
13. There is a common sense of disappointment at school on the issue of Personnel Improvement Plan that LFs said they would give Training on but never did.
14. Teachers in this case have devised a way to help one another develop a plan, and await approval of the LFs.
15. I suspect that the silence on the part of the respective LFs may mean they have a problem or are not sure of what is to be done.

Curriculum Development

16. Guidelines do not allow much flexibility to teachers and their teachers to deviate from what is prescribed.
17. Guidelines do not allow much initiative.
18. I do not think that the LFs take teachers' problems to the DoE. There is one example in which I know that the problem was not taken, because it has not been addressed.
19. I do think that training sessions are good.
20. For the guidelines to be very helpful to teachers they must include useable ready teaching programmes/tasks for teachers.

Quality Assurance

21. IQMS is working all right.

22. IQMS is not fair regarding the satisfaction of all requirements of assessment to get a salary raise.
23. DoE should develop a fair system because at times supervisors do not like a teacher. Given such power, some principals may deny the teacher a salary incentive.
24. The general feeling that I sense and detect it myself is that DoE not allow production of very high quality graduates.
25. Individual learner's performance has fallen.
26. Teachers can now however be trusted with assessment standards.
27. My school is a learning organisation as it encourages continuous learning.
28. The school is prepared to deal with multiculturalism and HIV/AIDS. There is a policy for HIV/AIDS.

Respondent 14

School N1

Teacher

Instructional Leadership

1. C2005 is easier following streamlining and strengthening.
2. But assessment standards are not easy to set and administer correctly
3. Moreover the administrative load of OBE is too much, especially typing and filing.
4. The solution may lie in training especially to structure lessons. This type of training needs to be thorough.
5. The latest version of C2005 to me is a constitutional matter not individual preference.
6. Although I was trained in the old way I did make a paradigm shift when I did OBE for my honours degree.
7. Among the problems I see are: that the DoE expects far too high level of competence. But issues such as the following:
    - Report to many groups; parents and the DoE.
    - Simplifying generic language of OBE.
    - Preparing parents to receive and understand the reports, need resolving.

Curriculum Development

8. Training emphasised implementation in RNCS.

9. Yes following many workshops OBE way is now familiar to me.
10. I am not sure that when teachers raise their concerns, learning facilitators take them up.
11. No, as far as I am concerned, LFs are not conversant and do not master the information they deliver on RNCS.
12. They rely on what is in the manuals of C2005 policy.
13. Training has not been sufficient in most cases.
14. In other cases teachers move back and forth in levels of classes and learning areas and this causes confusion.
15. It is hard to implement OBE/C2005 values of equity, integration, human rights, environmental awareness in some learning areas but it is easy to do so in others.
16. Assessment standards are difficult to implement. For example in a year you can in some cases only implement one.

Quality Assurance

17. Quality Assurance in the form of IQMS is working well. It has a reference manual for teachers to use.
18. But learning facilitators and trainers in Quality want personal plans even when teachers have not had enough time and training.
19. The problem I see is hurried implementation.
20. Values of C2005 are hard to implement.
21. However, LFs support teachers development most, especially in cluster departmental training sessions where there is a chance to share much information with teachers from other areas.
22. LFs differ; some are friendly while others are not.
23. I think most teachers have made a paradigm shift.
24. But some power of the teachers has been eroded.
25. To me varying and making lessons authentic can achieve excellence.
26. Most teachers can also become researchers but those who are not enthusiastic will continue doing poorly.
27. My school is prepared – I regard it as a learning school for the many courses we attend on OBE and other teacher development issues.

28. The school has provision to appreciate all cultures and promote multiculturalism.
29. Life orientation and more policy measures on HIV/AIDS educate staff and learners on HIV/AIDS.

Respondent 15

School N2

Position: Teacher

Instructional Leadership

1. I see the expectation that all learners reach a certain level – assessment and outcomes – not realistic.
2. The expectations are not aligned to the time development of children.
3. Teacher's problems include the low capacity of learners.
4. OBE is good but not for big classes that impede efficiency now.
5. In the beginning OBE was very confusing.
6. Now especially with LFs, they are very helpful.
7. Teachers understand what is expected from guidelines.
8. I have been teaching for many years so my experience helps me implement.
9. I do not master scheduling, pacing and tasks assignment as well as evaluation in OBE, but I know where I am going.
10. Training has helped me to be confident.
11. I would give effectiveness of training 3 on a four point scale where I poor, 2 average, 3 good and 4 excellent.

Curriculum Development

12. But there has not been enough training of teachers in my opinion to allow evaluating its impact. After June sessions I think I will be in a position to evaluate the OBE training.
13. Emphasis in training was on outcomes and paradigm shift.

14. Regarding the values and culture that we are supposed to incorporate into our programmes for learners – we try and succeed with some but we do not succeed with others.
15. I do not feel empowered by OBE but I also do not feel as helpless and bad as before training and guidelines.
16. Guidelines have helped me with content – I feel that the methods of varying delivery of lessons were already there in my teaching before OBE.
17. Before training we used to discuss the confusion but now there is more hope and understanding

Quality Assurance

18. With regard to Quality Assurance and its institutions – I teach consistently as a professional, I do not rely on quality assurance bodies.
19. As part of quality assurance I comment the LF who has been helping in my learning area – she spends time in the school, is democratic and teacher friendly.
20. The last training was good and worthwhile.
21. My school can be regarded as a learning organisation – it has on-going training programme for teachers, teachers improve use of technology and other content.
22. The school is prepared to deal with multi-cultural issues and HIV/AIDS. There are school policies for them.

Respondent 16

School N3

Position: Teacher

Instructional Leadership

Comment and assess the ease or/ and difficulty with which you are implementing C2005

1. Strengthening and streamlining C2005 has explained outcomes more and assessment standards. One is clear about what they are dealing with.
2. I see problems in township schools like our school – they are overcrowded – especially compared to former model C schools in urban areas.

3. As classes expand a teacher is not able to reach all learners when explaining/clarifying work in class.
4. Teachers also have problems dealing with different levels/grades and learning outcomes, which is common in schools.
5. The other problem that I see is that there was too little time given to understand programming – scheduling lessons in OBE.
6. Adequate training would at least take 3 years and not 3-day sessions. Even one year would have been better.
7. Classroom achievement and homework are not helped by conditions at home that are not supportive. Some children now do not have parents.
8. Whether training works – there has not been any feedback to teachers.
9. There has never been an indication that teachers can make an input – to and on learning facilitators.
10. According to me C2005 designers do no have an idea about what is happening at school level.
11. The DoE does not give teachers a chance to write down and give feedback on their problems.

Curriculum Development

12. The problem of guidelines is that they are short and leave teachers with a lot of time to fill a gap in class teachers at times counted on guidelines.
13. Teachers can and should be included in curriculum design so that they can give designers information on what the classroom situation is. That way there can be relevant work/guidelines.
14. Well-trained people alternatively could be better.
15. There is too much emphasis on participating learner and no time is given for a non-participating learner in the classroom, under learner-centred teaching.
19. Teachers feel over loaded and have very little time for even their own families/children – and have lost commitment.

20. In order to restore commitment, these observations should be addressed the DoE must be serious and address the teachers' concerns.

Quality Assurance

21. IQMS helps teachers to master some learning areas.
22. However they do not help where it is most important, in class. They concentrate on generic issues to do with teaching and learning.

23. IQMS however helps teachers to bring out their best and motivate them to show what they can do.
24. The DoE should quickly get trained people to do the work of IQMS and quality assurance bodies.
25. My school is a learning organisation because it helps many teachers to continue learning per a development policy.
26. There is a policy to deal with HIV/AIDS.
27. In assessment, if I were expected to teach one learning area over different grades I would find it easier. Now I teach many and poorly with much strain. This makes me sad that I cannot enjoy achievement of grades in class.
28. Teachers should be rewarded more monetarily as an incentive for the hard work.

Respondent 17

School N8

Position: Teacher

Instructional Leadership

1. Regarding C2005 or NCS there are problems of understanding what is required by the guidelines – what/how teachers have to use them to schedule lessons, give content structure and directed activities.
2. Teachers have had training but it was only two days and too short.
3. Learners are not working hard also.
4. Learning support materials are not enough.
5. Learning facilitators try to give information that would make things easy for teachers in class – implementation of C2005.
6. Training sessions have been generic and emphasised work schedule and Assessment schedules.
7. The general feeling of all staff about OBE is that it is a good programme but as it has been rushed in implementation it is hard for teachers.
8. Old teachers are specially finding it harder than new teachers.
9. I do feel part of the OBE education system but the DoE should carefully help teachers by checking to make sure LSM are good and implement able.
10. The quality of training sessions was average I would have given it 2 when 1 is poor, 2 average, 3 good, 4 excellent.

11. I think LFs sent to our area were not very conversant/do not understand C2005 guidelines also.

Curriculum Development

12. Guidelines themselves are helpful/ and they leave you with enough space to teach what you find important.
13. But LFs are strict on what they want done – which is good as they insist that you do more.
14. It also becomes difficult when the class is too big. Smaller classes allow group work better.

Quality Assurance perspective

15. According to me it is working
16. But some HoDs particularly do not understand (or like) some teachers so they mark them down – they use the IQMS as a power tool.
17. Choice of peers by teachers would be better – more acceptable.
18. What could increase capacity of teachers is more training and incentive in money terms.
19. Other complaints/issues to be addressed by DoE on teachers include: that the law should be fair to all civil servants (i.e. teachers be treated like all national civil servants) e.g. stiff measures applying to love affairs of teachers and learners should apply to all civil servants equally.

Is your school a learning organisation?

20. My school can be called a learning organisation as it is training many teachers.
21. On multiculturalism – the school is more or less single ethnic group – Sotho. The staff is mixed and there is harmony.
22. On HIV/AIDS the school does not have a policy, but a lot is done to disseminate information. We invite people from outside to talk to learners and teachers – 2-3 times a year.
23. The principal noted that the school inherited big/facilities when white parents took their children out as the school changes from a Model C school. So it is a town school with township population.

Respondent 18

School N8

Position: Teacher

Instructional Leadership:

1. Teachers still have problems with C2005.
2. Teachers experience a lot of administrative work and cannot concentrate on teaching.
3. Learners are also not clear about what is required.
4. Learners are still used to spoon-feeding and want more teacher centred lessons.
5. The expectation is that learners who are starting with OBE now will get used to it.

Curriculum Development

6. I think like most teachers that OBE is a good programme/system but that it is rushed and that makes it difficult for teachers to understand it and implement it well.
7. I do feel that I am a stakeholder in OBE but I want the DoE to help in giving more training and good LSM.
8. Guidelines are good in helping teachers to design lessons that last and give learners much to learn.
9. But learners most of the time are not participating.

Quality Assurance

10. Learners participate when officials come for class observation as part of IQMS.
11. I have talked to learners telling them to behave well so that I do not fail the evaluation and they have cooperated in the past.
12. Some HoDs use the evaluation to deliberately fail teachers that they dislike.
13. Salary increase could motivate teachers to work harder and increase their capacity.
14. DoE should allow genuine affairs when they develop in school between male teachers and learners when there are plans for marriage.

Prod: Comment on how far you think you school is a learning organisation and is prepared to deal with problems of Multiculturalism and HIV/AIDS.

15. I think my school is a learning organisation as it has an on going courses attended by teachers.
16. The school has only one ethnic group but has a multicultural body of teachers that interacts well.
17. The school has one HIV/AIDS policy but does a lot to disseminate information about HIV/AIDS to learners and teachers.
18. There are cultural activities and dates but white teachers are reluctant at times and do not participant.

Respondent 19

School N7

Position: Teacher

Instructional Leadership:

1. In the workshop, it is easy to participate and even role-play on delivering C2005 lessons. But in class it is difficult.
2. One problem is that classrooms are full as there are 45 to 50 learners.
3. The big numbers reduce the level of understanding that the big numbers in the classroom can achieve. So it is low in most cases.
4. Most learners find the culture of OBE and its terminology strange/difficult.
5. Learners also have little support from their homes, as some relatives and parents are not educated so they cannot help learners
6. Teachers are forced into giving them simpler tasks that they can handle.
7. However teachers are aware that simpler tasks mean lower standards and of maturity tasks.
8. Common Tasks of Assessment are hard.
9. CTA are usually different from what we have done in class.
10. Language that is used is usually hard (i.e. English).
11. Maybe learners could take materials easier if they used their languages.
12. Designers should also remember that learners are doing the content in a second language.

13. Multicultural schools do better because they have used English Language for over a long time.

Curriculum Development

14. Guidelines and LSM are good enough.
15. But the guidelines are also difficult they are general. They are not explained well.
16. They (guidelines) explain things far from what is done in the classroom in grades 8-9.
17. They concentrate on textbooks – which are case studies of certain/different places of grade 9.
18. The school has limited resources – especially we have limited photocopying materials,
19. LFs also do not come in the beginning of the year when their services are needed more.
20. Workshops are not enough.
21. The Training in our holidays. This dissatisfies us. We only honour directives.
22. If the time and conditions of training satisfy teachers they can be more satisfied and more enthusiastic.
23. I know that the issue of big numbers of learners in the classroom cannot be solved now the school facilities are small.
24. But there are also few learning support materials.
25. OBE changes too much too quickly and confuses us, we are confused. I am not sure of how I can master the curriculum.
26. I am not confident that a 5 day workshop can prepare me to transmit the content and methods to another person.
27. Implementing requirements of C2005 principles are very difficult. The requirements are too many.
28. Learners are also different. Others are shy, lazy and do not work in a group.
29. With regard to guidelines, teachers' representation and constant (on going) communication can help the designers to meet teachers' expectations and guidelines. Designers may be directors but they do not understand the position of teachers in the classroom.
30. I have been to cluster training sessions for assessment and marking.

Quality Assurance:

31. The process/quality assurance system is not working well. We have indicated where we need development in one area but until now we have not had anything from the DoE.
32. WSE is coming on the 22 to 26 May 2006. The officials from DoE have promised to give us our strengths and shortcomings.
33. Yes my school is a learning organisation because the teachers continue learning and there are many courses we attend.
34. The school also addresses HIV/AIDS with workshops. Learners are also given workshops.
35. There are learners who are infected but are not discriminated.
36. The school has a policy to deal with multiculturalism.

Respondent 20

School N5

Position: Teacher

Instructional Leadership

1. Training for implementation of RNCS has been too short 3-4 days.
2. It is also done 3-4 months intervals – in which there is no follow-up.
3. These problems frustrate teachers.
4. The number of learners in the classroom is also too big 45-60.
5. C2005/NCS is also presented in English so teachers may not feel they own the programme. Learners and teachers have limited understanding of the language.
6. Teachers find the pace of progress show at times – so they fall back on the old methods.
7. LFs have a problem. They do not make any follow up on the teachers training.
8. Teachers find LFs inadequate. They (teachers) see them as shallow relying on books and guidelines.
9. Teachers think LFs can misinterpret guidelines also – and some teachers think they do not learn anything new from LFs.

Curriculum Development

10. Teachers work with learners cannot continue at home because the conditions do not allow school with in abstract and parents can not help.

11. LSMs are helpful to teachers in terms of designs of curriculum.
12. Yet learners do not care much and have little use for the LSMs because they do not pay for them.
13. Teacher training sessions fail to give new OBE values to teachers.
14. At least 6 months would be better time of training.
15. Teachers' feelings are that OBE is being imposed from above – autocratically.
16. In interpreting guidelines teachers are bound to differ according to their ability.

Quality Assurance

17. IQMS and WSE as institutions do not help teachers much.
18. We meet once a year when we have to send information to the department.
19. Training sessions tend to be during vacations. They are not enough (e.g. in June there is 5 day workshop).
20. Training is generic and not practical.
21. My school is trying to prepare itself through its teachers to be lifelong learning organisation.
22. Rapid changes are confusing teachers.
23. Dealing with HIV/AIDS. The school has a policy and a rotational training system. Learners are also included to learn.
24. Multicultural society – the school is prepared.
25. Parent need to meet and also make an input into how we develop when they understand and what schools are looking for and share achievements.
26. OBE has several shortcomings at the moment. Maybe in future it could be improved. At the moment judging from the Matric candidates work there are short comings.

Respondent 21

School 9

Position: Teacher

Instructional Leadership

1. With regard to implementation of C2005, there are still too many problems – there is too much paper work.
2. There is too much administrative work.

3. Work schedules and schemes of work that teachers have to make themselves, are too much.
4. Too many learners in each classroom.
5. Teachers' tasks, research, non familiarity with language, report, and recording – all make it difficult for teachers to achieve much.
6. Paradigm shift and policy guidelines for C2005 do not have enough support.

Curriculum Development

7. LFs are expected to be knowledgeable and responsible for the implementation of C2005 guidelines. But they don't show expertise, they only emphasise implementation of policies.
8. Designers of C2005 do not consider what is happening in the classroom.
9. LFs cannot solve the classroom problems.
10. What is needed is demonstration in class of how to implement C2005 – which LFs are not doing at the moment. LFs had directives and are not practical.
11. Training sessions were helpful somehow – they were conducted by LFs who had manuals that could have been given to teachers – to save money.
12. Principles of OBE are not clear and create problems also.
13. In regard to these principles LFs come to moderate – this is not right even though it involves teachers' creativity.
14. Teachers are also not proactively working in teams to solve problems.
15. But the teachers in the area have come together to solve problems with teachers from other schools in the area.
16. Yet even when teachers have taken this much trouble sometimes LFs come and correct and say it is not right.
17. Guidelines and LSMs often arrive late but they are helpful.
18. As they are often not enough we have shared them with neighbouring schools when they have the guidelines.
19. Training and learners numbers. In this school we conduct our own workshops these help and are solving problems.
20. Training that teachers have been given this far is too short and does not equip them with more than what learners know.
21. Adequate feedback and initiative – training would take at least 3 years.

Quality Assurance

22. Yes IQMS is working – we had a workshop and started IQMS.

23. Some teachers still do not understand but we are implementing IQMS.

Prod: Is your school a learning organisation?

24. Our school can be regarded as a learning organisation as it is learning and adjusting and preparing to face new problems.
25. The school has also prepared for HIV/AIDS – we have a policy on the issue. Education and learners attend training sessions in which they obtain manor information.
26. Learners' cascades are also practised to a certain degree and bring much information for sharing.
27. In terms of multiculturalism, we give respect to all other persons even when we do not have many groups. The main group that we serve are Sotho.
28. OBE does not make me feel empowered.
29. Learners have too much right now and the assumption that they should work at their own pace is not working.
30. Parents are not satisfied also.
31. There are grave limitations in what teachers know. There is the lack of resources in isolated rural schools the DoE should note the differences among schools. Even including qualified teachers – rural areas – schools may even employ Matric graduates out of desperation.

Respondent 22

School N8

Position: Teacher

Instructional Leadership

1. The biggest problem (or major) is that teachers do not have enough information.
2. Trainers are not competent – they are also struggling to impart guidelines.
3. I think quality is lost as teachers struggle especially with assessment, which is quality assurance.
4. Teachers still implement summative assessment.
5. There is a gap between what guidelines want and what teachers are doing.
6. I think that the DoE is aware that assessment is not done properly or/and understood by teachers.

7. Now there is a syllabus in the form of NCS as opposed to C2005 that required teachers to programme.
8. Introduction of NCS has structures, schedules, pacing and expectations but assessment is a problem – training is needed.
9. I personally have trained and feel confident of using new strategies e.g. peer assessment etc.
10. Teachers are resisting change – most teachers are not ready for change.
11. Those who resisted are now taking NCS up because they now see that it is here to stay.
12. Many teachers are stressed by the new curriculum to the point of having health problems.
13. What could help teachers beyond the curriculum training is psychological conditioning.
14. Then strategies such as motivation at school level, leadership training should be applied.
15. Teachers are not buying into NCS because it was imposed from above – top down.
16. Piloting is our area (of NCS) was not done so teachers were not able to give an input.
17. At the moment teachers complain but nothing can be done.
18. However to me OBE/NCS makes learners take part more in group learning – in my opinion this is good.
19. Teachers also stand to gain in the end when NCS is implemented properly.

Curriculum Development

20. NCS however to me makes positive changes and accommodates a lot from learners and teachers.
21. NCS addresses many problems – when there are many skills needed to solve problems.
22. LMS are not helping the new curriculum, which is just being introduced – they are not adequate.
23. In some instances we have old books that were brought for OBE when it was introduced. These are of no use now.
24. This shows that rapid changes are making LSMs outdated very quickly.
25. Those books are also not helpful or appropriate for classes.

Quality Assurance

26. Our school is in its 2nd year with IQMS – what is done mostly is class visits – not how it is supposed to work in and out of classrooms.
27. I would say development of teachers is not taking place.
28. LFs and their work can be seen as a certain culture in which there is selective assistance, in some cases/learning areas they are helping in others they are not.
29. The NCS has life long learning on paper but there is little training in my opinion.
30. Many teachers are behind with the understanding of the programme. There is no organised progress to mastering NCS.
31. The school has no school policy to deal with HIV/AIDS – however we as a school community have started to care for orphans.
32. The school community together with one corporation have planted crops and vegetables to help affected learners – giving them some food and vegetables – about 100 learners are involved.
33. It would be good and helpful to have a policy on HIV/AIDS.
34. The school is still lacking in addressing issues of multiculturalism. Last year there was an attempt to promote multiculturalism and it had little impact.
35. My last comment is that teachers should be trained in curriculum development for some length of time at university level.

Respondent 23

School N7

Position: Teacher

Instructional Leadership

1. In this school we have been given the explanation that specific outcomes and learning outcomes have been integrated but there is insufficient explanation of what is expected.
2. LFs do not explain what is expected clearly.
3. They (LFs) sometimes change what they have given in training so teachers remain uncertain and do not know what to trust and give to learners.

4. One of the problems for teachers and classroom scheduling and pacing is that at times they are moved over phases – moving from GET to FET.
5. Moving across phases and learning areas means they cannot master learning areas at particular levels.

Curriculum Development

6. Guidelines help but they are interpreted differently. They confuse teachers.
7. Training – especially time is too short there is not enough to be very practical.
8. 3-4 months training would help more than the 3-day workshops.
9. I suspect LFs may themselves have trained for 3-6 months on OBE and NCS.
10. Learners-centred lessons are still not the order of the day at the moment.
11. Teachers still rely on their past experience in teaching.
12. Learners also still rely heavily on the teacher who knows how to research.
13. You as a teacher must provide leadership and obtain information from all possible sources.
14. At the moment there is one 3-day session of training a term – it is little.

Quality Assurance

15. IQMS came but there is no follow-up
16. Because of the lack of follow up the institutions/systems are not helpful – they have limited value.
17. OBE has brought more work but there is also some independence.
18. Teachers can now learn more from one another.
19. Learners are not taking responsibility either – the system is more beneficial to them.
20. The system regards the views of learners as very important.
21. I regard my school as a learning organisation as there are continuing courses and training and sharing of experiences among teachers.
22. The school has an HIV/AIDS policy and sends learners to courses/workshops where they obtain information and come and share it with others.
23. The school is receptive to multi-cultural views and other communities. The school community is sensitive to respecting other groups and cultures.

24. To raise morale of teachers the DoE should consider more pay increases, dignity, esteem and promotion of the value of teaching and education. The DoE should promote teaching.