

**THE EXPERIENCES OF THE DEVELOPMENT SUPPORT  
GROUP (DSG) IN THE IMPLEMENTATION OF THE  
INTEGRATED QUALITY MANAGEMENT SYSTEM (IQMS) IN  
BUTTERWORTH DISTRICT, EASTERN CAPE**

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By

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## **DECLARATION**

I, the undersigned Judith Nonkululeko Ndandani-Msindwana, do hereby declare that the study of the experiences of the Development Support Group (DSG) when implementing the Integrated Quality Management System (IQMS) in Butterworth District, is my original work and that all sources used in this study have been indicated and acknowledged by means of complete references.

This dissertation has not been previously submitted for a degree at any other university.

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Signature

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Date

## **DEDICATION**

This piece of work is dedicated to my siblings, Godfrey Galelekile Ndandani, Marjorie Nomonde Sopedete (Nee Ndandani) and the late Aardt Sizwe Ndandani.

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## **ABSTRACT**

This study investigated the experiences of the Development Support Group (DGS) when implementing the IQMS (Integrated Quality Management System) in Butterworth District of the Eastern Cape. The aim of the study was to explore the experiences of the DSG when implementing the IQMS in an attempt to determine whether the DSG can cope with the task of being part of evaluation in education, and how the negative experiences could be improved. In order to get the experiences of the DSG when implementing the IQMS, the researcher embarked on this phenomenological study. Data were collected by means of one-on-one semi-structured interviews and the perusal of the IQMS document, Resolution 8 of 2003. Responses from the participants were tape-recorded and eventually transcribed, analyzed and interpreted. The main feature revealed by the study is gross lack of confidence, feeling of insecurity and ambivalence on the part of the DSG. On the basis of the findings, recommendations that will assist the DSG (and other IQMS implementers) to improve IQMS implementation, have been made. This study also serves as the voice of the DSG for they have also made suggestions to improve on the negative experiences they have highlighted.

The conclusions arrived at in this study are specific to the DSG of the sampled schools. The conclusions reflect and explain the challenges faced by the DSG in Butterworth district. But the findings give a reflective explanatory depth to the experiences the DSG when implementing the IQMS.

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# **CHAPTER 1**

## **INTRODUCTION AND OVERVIEW**

### **1.1 INTRODUCTION**

The aim of this study was to investigate the experiences of the Development Support Group (DSG) when implementing an Integrated Quality Management System (IQMS), with the intention of determining if the DSG could cope with the task of being part of the evaluation system in education.

In order for any organization to achieve its objectives it must take an initiative to train and capacitate its workers. In this way the workers are armed with knowledge that is defined by Hawkins, Weston and Swanell (1991) as a body of organized information. The Department of Education (2006) has pointed out that teachers need to be developed for the attainment of quality teaching and learning. Middlewood (2001) has noted that the actual performance of teachers is critical to the success of education in South Africa, hence the adoption of the IQMS in 2003 as a national instrument to evaluate teachers and schools (ELRC, 2003). This is therefore equally true of the DSG who is key to the implementation of the IQMS. It is important that the DSG should be trained, supported, given knowledge of what the IQMS really entails, made conversant with IQMS terminology in order for the DSG to have confidence which should ultimately lead them to internalizing and owning the IQMS system.

This chapter gives background to the study, states the research question, purpose of the study, assumptions of the study, delineation and limitations, definition of terms and concepts, rationale for the study, significance of the study, and chapter overviews.

### **1.2 BACKGROUND**

For many years there has been no national system of evaluating the performance of schools, and there was no comprehensive data on the quality of teaching and learning, or on the educational standards achieved in the system (Department of Education, 2001). As a result, in 1998, a Development Appraisal System (DAS) was introduced in order to help educators with

professional development, career planning and in-service training consistent with needs of individual educators at schools (Montgomery & Hatfield, 1989). In the year 2000, the Whole School Evaluation (WSE) was introduced. Its aim was to improve the overall quality of education in South African schools (Department of Education, 2001). In addition, the Education Labour Relations Council (ELRC), in accordance with Collective Agreement No. 7 of 2003, a watchdog for conditions of service and quality education, brought about the introduction of the system of Performance Appraisal (PA). Before such performance appraisal could be implemented, an agreement was reached in the ELRC to integrate the aforementioned programs on quality management in education (Department of Education, 2003). It is this ELRC agreement, Collective Agreement No 8 of 2003 (or Resolution 8 of 2003) that emerged and was gazetted as the IQMS (Integrated Quality Management System) document on the 27 August 2003.

The IQMS is informed by Schedule 1 of the Employment of Educators Act No 76 of 1998, whereby the Minister is required to determine the performance standard of educators. Each educator's performance must be measured against the stipulated standards of the IQMS document. A four-point rating scale, (See Appendix1), is employed to determine the level of performance for each educator. The ratings provided by the Development Support Group (DSG) clearly indicate areas in need of development as well as the strengths of individual educators that need to be enhanced.

The IQMS comprises of three programs, namely, Developmental Appraisal (DA), Performance Management (PM), and Whole School Evaluation (WSE). The ELRC proposes that the programs be implemented in an integrated way as to ensure optimal effectiveness and coordination of the various programs (ELRC, 2003) yet the purpose of each program should remain intact. The three programs ought to complement each other and run concurrently during the implementation of the IQMS. The IQMS has been in force for about 5 years now in all the nine provinces of the country. Mpumalanga, Limpopo, KwaZulu Natal and the Eastern Cape are facing more implementation problems when compared to Gauteng and the Western Cape (Department of Education, 2007).

The role of the DSG is of cardinal importance in the implementation of the IQMS. In the first year of implementation, educators must identify their DSG. After completing the initial self-evaluation, and having reflected on strengths and areas in need of development, each educator needs to identify his/her own DSG within the school. This must include the educator's immediate senior and a peer educator selected by the educator on the basis of appropriate phase and learning area expertise (Department of Education, 2003.)

The main purpose of the DSG is to provide mentoring and support. The DSG is responsible for assisting the educator to develop a Personal Growth Plan (PGP) (See Appendix 2) and to work with the Staff Development Team (SDT) to incorporate plans for development of the educator into the School Improvement Plan (SIP). The DSG is responsible for the baseline evaluation of the educator for development purposes. The immediate senior is responsible for the summative evaluation at the end of the year for Performance Measurement (PM) which will lead to the educator being given an incentive of one percent pay or grade progression. The DSG must verify that information provided for PM is accurate (Department of Education, 2003).

The IQMS is designed to ensure that the individual educator is democratically involved in the process of development (Department of Education, 2003). Mestry (1999) found that in historically disadvantaged schools, educators were dissatisfied with the previous system of appraisal which had pitfalls. They were found to be judgemental, they led to an abuse of merit awards, had too much secrecy surrounding the appraisal, were characterized by favouritism, nepotism, victimization, and guilty of sexual harassment and discrimination against women. It identified itself with the incompetence of inspectors, and further used as system for promotion of incompetent candidates.

In agreement with the idea that IQMS had been designed for the voluntary participation of the individual educator, Stein (1996) asserts that individuals develop by taking responsibility for their own growth. It is through the continuous improvement and development of each individual educator that quality education will surface. There is a need for quality at all levels in an organization or business – in products, in service and in the systems to deliver these. Training is the key issue in quality management (Embree, 1992). This study attempts to discover the

experiences of the DSG when implementing IQMS, therefore is capable of revealing whether the issue of training was prioritized and taken into cognizance as key to quality management.

Grobler, Warnich, Carell, Elbert & Hatfield (2002) have noted that public organizations in South Africa such as municipalities are at pains to increase productivity among employees. One of the biggest challenges facing them since the country's re-entry into the international community is employees' productivity. The above view is supported by Nel and Haasbroek (1998), who state that South Africa is faced with an enormous challenge of increasing productivity among workers. Schools are no exception to this. There is a growing concern in the Department of Education over the quality of education and solutions are being sought to improve teaching practices. The IQMS is the proposed solution to this challenge, and the DSG is one of the major structures to implement the IQMS effectively. Since the IQMS is still in its teething stage, it is of crucial importance to investigate the experiences of the DSG when implementing the IQMS because this will show if the IQMS is an effective appraisal tool.

### **1.3 STATEMENT OF THE PROBLEM**

The roles and responsibilities of the DSG in the implementation of the IQMS show that the DSG forms part of the evaluation process in education. It is in the execution of its duties that the DSG is likely to encounter challenges.

The major challenge that the DSG must manage is the tension between educator development and accountability. The DSG, therefore, is expected to be equipped with appropriate skills and supported by senior management. According to Murgatroyd & Morgan (1993), lack of appropriate skills, poor planning and lack of viable commitment by leaders, lack of information, purpose, and paucity constitute a challenge. The question to consider is whether the DSG has the appropriate skills to implement the IQMS and whether the DSG gets the support from the seniors, namely: the principal, the School Management Team (SMT) and the district officials.

Lack of appropriate skills can impact on certain psychological outcomes such as de-motivation and low self-esteem. Swanepoel, Erasmus, van Wyk and Schenk (1999) state that raters who feel uncomfortable about any confrontation with subordinates may be inclined to assign average

ratings where poor ratings would have been appropriate. Appraisees facing even the most accurate and objective criticism may tend to resist or reject findings if they perceive assessment as a blow to their self-esteem. This is where the capacitated DSG must demonstrate his/her skills as having been trained as a mentor and coach.

The problem that this study aims to address is to explore the experiences of the DSG when implementing the IQMS, attempting to determine whether the DSG can cope with the task of being part of evaluation in education, and how the negative experiences could be improved.

Apparently educators view the evaluation process in the IQMS process only as a means of advancing their salaries by way of getting one percent pay progression after submitting summative evaluation scores. The emphasis seemingly is on one percent pay progression rather than educator development. This study therefore seeks to investigate experiences of the DSG when implementing the IQMS in Butterworth District.

#### **1.4 RESEARCH QUESTION**

How does the DSG experience the implementation of the IQMS in Butterworth district?

#### **1.5 PURPOSE OF THE STUDY/ RESEARCH OBJECTIVE**

The purpose of this research is to investigate the experiences of the DSG in the implementation of the IQMS.

#### **1.6 THESIS STATEMENT**

Until such time that the school-based educators own the IQMS program, school-based educators will continue to 'fill in' the IQMS forms (See Appendix 1) just to comply with the requirements of the Department of Education in order to get one percent pay or grade progression, and unless the DSG is trained properly in IQMS procedures and processes, in mentoring and coaching, as appraisers and moderators, and ultimately be certificated in these, the DSG itself, lacking capacity, cannot be able to deliver quality services to allow the IQMS to pass the test of being an effective educator evaluation and appraisal instrument.

The IQMS, supposedly, is a democratic approach towards teacher appraisal and educator development. But the IQMS is found wanting and not adding value to professional development, which undermines its very intentions (Class Act Educational Services, 2007).

The core business of the IQMS is professional development. Keith and Girling (1991) make it very clear that for professional development to be effective, motivation should be intrinsic rather than extrinsic. From a systemic level it is important to initiate teacher development programs centrally. But the involvement of schools is equally important, specifically with the needs of teachers in mind. Unless there is a coherent and integrated professional development plan that grows out of the school vision for learner success to which teachers are committed, workshops and other initiatives will lack meaning. In order to improve schools and provide quality teaching to learners, teachers need to develop themselves professionally in their knowledge, skills, values and attitudes. They need to be self-directed. They should display a willingness to learn when they have a perceived need, and they desire immediate application of new skills and knowledge. At school level it is the DSG who must drive the development process and assist teachers along these lines through the implementation of the IQMS.

## **1.7 DELINEATION AND LIMITATIONS**

The study is conducted only on four sampled schools in Butterworth district. This imposes considerable limitations on the study since the findings cannot be generalized to other schools in Butterworth. The study's findings are also restricted to the DSG, other implementers such as the Subject Advisors and Education Development Officers (EDO's) are not included in the study.

## **1.8 DEFINITION OF TERMS AND CONCEPTS**

**DSG** – In this study DSG means a group of school-based teachers (educators) who are responsible for the evaluation and appraisal of one or more educators in the school. The educators are experts in their fields of operation. They are mentors and coaches who have been identified and accepted the task as trained and skilled educators in their areas of operation. The words 'teachers' and 'educators' are used interchangeably in this study.

**IQMS** – In this study the IQMS means a program that is implemented by the DSG as a tool to evaluate educator(s) under their mentorship following prescribed processes and procedures in order to identify strengths and weaknesses of individual educators for development purposes.

**Experiences** – Experiences in this study means challenges faced by the DSG when implementing the IQMS with regard to:

- Effectiveness of the training received by the DSG towards the implementation of the IQMS.
- The kind of support received by the DSG when implementing the IQMS.
- Success of the IQMS implementation. This includes attitude of educators towards the IQMS implementation as perceived by the DSG.
- Lastly, suggestions by the DSG to improve IQMS implementation.

## **1.9 ASSUMPTIONS OF THE STUDY**

The study is conducted under the following assumptions:

- Although the IQMS is directed at school-based educators, the school environment wherein the implementation of the IQMS would take place was not considered when the idea of the IQMS was conceived. The DSG, in particular, does not have a say.
- The IQMS policy just pounce on the DSG to implement without consultation, and moreover without giving the DSG proper training in the job. As a result both the educator and the DSG ‘do’ IQMS to comply with the requirements of the Department of Education. Both educators and the DSG are seen not to understand the purpose of the implementation of the IQMS.
- ‘Doing’ IQMS usually means the filling in of the IQMS forms (See Appendix 1) in order to get pay or grade progression. On the other hand the IQMS carries a threat of being a legally binding document as Weber, (2005) has pointed out.
- The distinction between educator and DSG is not clear, or not convincing enough for the one referred to as ‘educator’ to respect the one referred to as ‘DSG’.

## **1.10 RATIONALE FOR THE STUDY**

Greenstein (1995) in Chisholm, Motala and Vally (2003) had observed that policy documents in the past had various limitations that prevented them from becoming effective tools for change. According to Greenstein, some of them, such as the reports of the National Education Policy Investigation (NEPI) were too theoretical and imprecise to offer concrete guidance for action. Others moved towards more concrete engagement with the existing system, but without sufficiently appreciating the need to deal not only with policy options in the abstract but with the mechanisms of change at the level of the State and with financial and bureaucratic constraints (Ibid).

As a result, the ANC's Policy Framework for Education and Training and its more practical offshoot, the Implementation Plan for Education and Training (IPET), both released before the April 1994 elections, did not give the new political administration clear and viable ideas on how to move the system from where it was to where it should be. Although the documents contained detailed plans of action covering the entire field of education, they generally did not consider in an adequate manner the institutional environment in which implementation of new policies would take place.

In the same way, the IQMS document contains the plan of action but does not consider the environment in which the implementation of the IQMS is going to take place. It is silent about capacitating the DSG which is shown to be the key personnel in the implementation of the IQMS. In this study the researcher seeks to address the question of inadequate consideration of the institutional environment in which the implementation of new policies takes place, as stated by Greenstein (1995). In the implementation of the IQMS, institutional environment includes the implementers of the IQMS in the schools, that is, the DSG. The importance of the DSG in the implementation of IQMS in schools is clearly stated (cf. Chapter 1.2), but the DSG seemingly is voiceless. The researcher wants the voice of the DSG to be heard.

Although Khumalo (2008) conducted research on the challenges faced by the DSG in the Vryheid district, the question of the DSG being voiceless was not actually dealt with. Khumalo sees the need for the DSG to be thoroughly trained. At the same time Khumalo urges the DSG to

take their work seriously. This sounds contradictory. The DSG must be made to own the program if anyone expects the DSG to deliver quality services.

Even the Draft Training Strategy for Teacher Performance Appraisal (TPA) & EMS-PMDS-Principals/Deputy Principals/Office-based educators (Department of Education, 2010), is silent about training the DSG. This draft is a discussion document aimed at improving the implementation of the IQMS in schools. The document does not mention the DSG even once (See Appendix 3).

Middlewood and Cardno (2001) have acknowledged that the challenge facing school managers apparently is appraisal of the performance of the staff and implications thereof. The evaluators (in this case, the DSG) and the evaluated (educators) must therefore understand the purpose of this evaluation.

The researcher has made the assumptions in paragraph 1.9 above because the researcher works with teachers almost every day. If summative evaluation scores are supposed to be submitted to the district office by a certain date educators do comply. But do they perceive this evaluation as purposeful?

## **1.11 SIGNIFICANCE OF THE STUDY**

The study will be of great value to the IQMS implementers, especially the DSG, as it hopefully serves as a platform for them to increase or raise their voices. Based on the findings, the researcher seeks to present guidelines to improve the process of educator evaluation. The recommendations that have been made will hopefully assist the Department of Education to make informed decisions as far as the evaluation of teachers is concerned.

## **1.12 CHAPTER OVERVIEW**

**Chapter one** is an introduction to the study. It gave background to the study, stated the research problem, the research question, purpose and objective of the study, thesis statement, delineation

and limitations, definition of terms and concepts, assumptions of the study, rationale and significance for the study, and chapter overviews.

**Chapter two** presents a detailed literature review. The background and legislative framework of the Integrated Quality Management System (IQMS) is given. The role of the Development Support Group (DSG) and the role of principal in the implementation of the IQMS are reviewed. The chapter ends with the conclusion that shows linkage between the IQMS and TQM (Total Quality Management).

**Chapter three** gives methodological framework to the study. It outlines the broad approach to the research, explains the research approach, details the sample and describes the research instruments.

**Chapter four** presents the findings of the research. Collected data is analyzed and interpreted.

**Chapter five** draws conclusions from the findings of the study discussed in Chapter four. The chapter offers some recommendations based on the findings and ends with the conclusion.

## **CHAPTER 2**

### **LITERATURE REVIEW**

#### **2.1 INTRODUCTION**

In this chapter related literature is reviewed. De Vos, Strydom, Fouche, and Delport (2005) have noted that literature review is an integral part of the research process. They explain that a review of literature is aimed at contributing towards a clearer understanding of the nature and meaning of the problem that has been identified. A thoughtful discussion of related literature, according to Marshall and Rossman (1999) cited by de Vos et al. (2005), builds a logical framework for the research. It sets the research within a tradition of enquiry and a context of related studies. They argue that the literature review further demonstrates the underlying assumptions of the general research questions. Strengthening this notion, de Vos et al. (2005) cites Neuman (2000) who asserts that a good literature review places a research project in context. It shows the path of prior research and how the current project is linked to the former. Literature review provides the framework of the research and identifies the area of knowledge that the study is intended to expand.

The purpose of this chapter, thus, is to provide an overview of literature and research that have a bearing on this study. A literature survey consisting of primary sources (including journals and newspapers) are used to elucidate the experiences of the DSG in the implementation of the IQMS. Findings from both the literature and empirical investigation are then used to make recommendations that will hopefully assist the DSG in the implementation of the IQMS. To make sure that the most important aspects of relevant literature have been included (de Vos et al., 2005); literature on the implementation of the IQMS will be reviewed to form a foundation for this chapter, and will form the base on which the rest of the subheadings will stand. Literature on the DSG will be reviewed in order to place the DSG in the implementation of IQMS.

Some inconsistencies in the IQMS will be reviewed in order to know what others have to say about this side of the IQMS. The role of the principal in the implementation of the IQMS will be reviewed in order for the study to show what role the principal should play and to be able to

determine if indeed the role of the principal is being fulfilled. Literature on appraisal, evaluation and Whole School Evaluation is reviewed because school evaluation is the gist of IQMS implementation. Literature on the importance of Human Resources Management is reviewed because the IQMS activities are in fact human resources management and development. The conclusion shows that the linkage between the IQMS and TQM in schools are no different from other organizations when referring to quality.

Literature will, therefore, be discussed under the following sub-headings:

- The Implementation of the Integrated Quality Management System (IQMS)
- The Development Support Group (DSG) in the implementation of the IQMS
- Some inconsistencies in the IQMS
- Role of principals in IQMS implementation
- Appraisal and Evaluation
- Whole School Evaluation
- Importance of Human Resources Management (HRM)
- Conclusion
- Summary

## **2.2 IMPLEMENTATION OF THE INTEGRATED QUALITY MANAGEMENT SYSTEM**

Literature on the Implementation of the Integrated Quality Management System is discussed to give background of the IQMS, and to show clearly where the DSG features in the implementation processes of the IQMS.

The Department of Education (1999) states that between 1985 and 1990 it became impossible for the inspectors and subject advisors to physically visit the historically disadvantaged schools due to dangers posed by sometimes riotous behaviour that was common in schools at that time. There was a need for the development of an appraisal instrument which would be acceptable to all stakeholders and which would enhance the development of competency of educators and the quality of public education in South Africa. Bisschoff and Mestry (2006) noted that the so-called

teacher performance management trajectory in South Africa went through a number of phases after the 1994 elections.

The ELRC (2003) and the Department of Education (2003) state that the IQMS outlines a system of evaluation and quality management of teaching and learning in all schools in South Africa. Each educator's performance must be measured against the stipulated standards of the IQMS document. A four-point rating scale, found in the instrument of the IQMS document (See Appendix 1), is employed to determine the level of performance for each educator. The ratings provided by the Development Support Group (DSG) indicate areas in need of development as well as the strengths of individual educators that need to be enhanced.

Bisschoff and Mestry (2006) states that the DAS aims at appraising individual teachers in a transparent manner whereby a teacher evaluates him/herself. The teacher then discusses the outcomes with the DSG at every school. WSE evaluates the overall effectiveness of a school while PM evaluates individual teachers for salary progression, grade, appointment affirmation, rewards and incentives. All three of these policies (DAS, PM, and WSE) were faced with implementation problems owing perhaps to the manner in which they were advocated to the school-based teachers. When IQMS was advocated, it was a way of stepping back and reflecting collectively on the enacted policies, i.e. DAS, PM, and WSE.

Perhaps the Education Department thought that for quality to exist in the system, different structures needed to be in place as a way of ensuring continuous improvement. Middlewood and Lumby (1998) and Middlewood and Cardno (2001) support Bisschoff and Mestry (2006) when they say that with the IQMS, the Department of Education seeks to provide a framework to ensure that each teacher's contribution impacts on the effectiveness of the system. The individual performance must lead to the achievement of the school system's goal as an organization. Such a framework can only work if staff know what is required of them, receive feedback on how they are doing, and are supported to achieve expectations.

The ELRC (2003) and the Department of Education (2003) also support Bisschoff and Mestry (2006) by agreeing that the primary intention of the IQMS is to encourage educators in schools to take responsibility for their own professional development and practice. The IQMS

emphasizes the process of self-evaluation by the educator in an ongoing way. This includes reflecting critically on the individual educator's own performance and setting down targets and timeframes for improvement. In short, the educator takes control of improvement and is able to identify priorities and to monitor his/her own progress. Therefore the individual educator must not be alone in his/her endeavours for professional development. The educator must have a mentor and a coach in the form of the DSG.

### **2.3 THE DEVELOPMENT SUPPORT GROUP IN IMPLEMENTATION OF IQMS**

This section discusses the role of the DSG in the appraisal system for educators. The extent of the role and responsibility entrusted to the DSG is explained. Literature on the relationship between the DSG and the educators is reviewed in order to find out what others have to say in this regard.

The role of the DSG is of cardinal importance in the implementation of the IQMS in order to ensure that the mission of the Department of Education is achieved. The IQMS ensures the democratic participation of the individual educator. The establishment of the DSG is intended to achieve democratic participation. In the first year of implementation, educators must identify their DSG. After having completed a first self- evaluation, and having reflected on strengths and areas in need of development, each educator needs to identify his/her own DSG within the school. This must include the educator's immediate senior and a peer educator selected by the educator on the basis of appropriate phase and learning area expertise. If there is no expert in the school for a particular leaning area, the DSG for that particular educator could be recruited, by the educator, from another school (ELRC, 2003).

The ELRC IQMS document, (2003) states that the main purpose of the DSG is to provide mentoring and support. Keith and Girling (1991) explain that two approaches to ongoing in-service staff development which are being widely experimented with are peer coaching and mentoring. These two approaches serve as models for a wide variety of efforts that combine skill acquisition and simultaneously foster collegiality and professionalism. Coaching, a term borrowed from the world of sport, is based on a simple four step model. This model includes the

essential steps needed to acquire a complex teaching skill and use it in a variety of classroom situations: a presentation of the theory or concept underpinning a specific skill, a demonstration of the skill, repeated opportunities to practice the skill under both simulated and actual classroom conditions, and repeated feedback on the practice efforts. Research, according to Keith and Girling (1991) indicate that a combination of these four elements is necessary in order to promote the incorporation of the skill into the teacher's teaching repertoire. This means that as mentor the DSG itself must have been trained in acquiring the skill of coaching and mentoring.

According to the ELRC IQMS document (2003), the DSG is responsible for assisting the educator to develop a Personal Growth Plan (PGP) and to work with the staff development team (SDT) to incorporate plans for development of the educator into the school improvement plan (SIP). The DSG is responsible for the baseline evaluation of the educator for development purposes. The immediate senior is responsible for the summative evaluation at the end of the year for Performance Measurement (PM). Summative evaluation scores are submitted to the district office of the Department of Education. This leads to the educator being given an incentive of one percent pay or grade progression. The DSG must verify that information provided for PM is accurate (Ibid).

The ELRC IQMS document (2003) states clearly the roles and responsibilities of the DSG in the evaluation process in education. It is that of monitoring and coaching the individual educator in order to enhance performance. It is likely for the DSG to encounter challenges when executing these duties. Murgatroyd and Morgan (1993) have argued that lack of appropriate skills among all educators may impact negatively on the outcomes of the whole evaluation process. Educators may view the process as an attack on their self-esteem. Swanepoel (1998) supports this idea when asserting that raters who feel uncomfortable about any confrontation with subordinates may be inclined to assign average ratings where poor ratings would have been appropriate. Ratees facing even the most accurate and objective criticism may tend to resist and revitalize findings if they perceive the assessment as a blow to their self-esteem. This is where the capacitated DSG must demonstrate skills of having been trained as a mentor and coach. The DSG must be able to show insight into the evaluation system and understanding of the criteria in the IQMS instrument.

The ELRC Collective Agreement No.8 of 2003 tabulates the duties and responsibilities of the DSG. The DSG forms part of the evaluation process in education and is instrumental in guiding and helping individual educators in compiling personal growth plan (PGP) (See Appendix2).

Each DSG must have a pre-evaluation discussion with the educator concerned during which the following issues must be clarified (Resolution 8 of 2003):

- Whether the educator understands what is expected of him/her in terms of the various performance standards and criteria and how he/she will be rated.
- The educator is given the opportunity to clarify areas of concern that he/she may have.
- The DSG informs the educator about the procedures and processes that will be followed throughout the IQMS cycles.
- The DSG explains to the educator that lesson observation involves performance standards 1-4 whilst other aspects involve the remaining performance standards.
- The DSG explains to the educator that the evaluation in respect of the remaining performance standards will be based on general ongoing observation by the DSG and on documentary evidence and other information that the educator may provide to the DSG.
- Guidance is provided to the educator on the development of his/her PGP. After the baseline evaluation, further discussions on the development of the PGP need to take place.
- The educator is also given an opportunity to raise issues that are hampering his/her performance. This is important in the light of the contextual factors, which may be recorded in the report and considered for possible adjustment of the mark awarded in respect of a particular criterion.

The DSG facilitates discussion around strengths and areas in need of development. The DSG ensures consensus is reached on the scores for individual criteria under each of the performance standards and to resolve any differences of opinion that may exist. The DSG provides the opportunity for constructive criticism and the intervention that could be provided by programs

including the Department of Education (DoE). This enables both the DSG and the educator to develop a PGP that includes targets and time frames for improvement. The PGP must primarily be developed by the educator with refinements being done by the DSG. The PGP provides a basis for comparison with the evaluation for performance measurement purposes that are carried out at the end of the year (ELRC, 2003).

The DSG must discuss the evaluation with the educator and must provide expert feedback. Feedback on observation should focus on performance and not on personality and on observation and not assumptions, and should be objective. Feedback should be an information sharing session, offering alternatives and not giving authoritative instructions. It is an opportunity to listen to the needs and challenges as experienced by the individual educator.

ELRC (2003) suggests that differences, if any, need to be resolved. Most differences of opinion between an educator and the DSG should be resolved at that level. Where agreements cannot be reached the matter must be referred to the SDT within a week. If there is still no resolution within five working days, either party may request a review by the grievance committee. The grievance committee will make a recommendation to the head of the provincial department. The head of the department will evaluate the recommendation and motivation submitted by the Grievance Committee before taking a decision which shall be made within five working days.

The very nature of the relationship between the educator as the appraisee, and DSG as the appraiser, is suggestive of the type of relations that might exist between the two. Literature on relations between educators and DSG is discussed to find out what others have to say about this.

Swanepoel, et. al., (1999) points out that the evaluators (DSG) may not be skilled and perceptive in making observations, and judgments may therefore be inconclusive and superficial. This may be due to the very short period of training received by the DSG. Observation as a major method of measuring success on the job often has dubious validity. Differences in payment based on these evaluators further complicate matters.

Most of the DSG experience problems when rating the performance of educators. These problems include error. The most common error in rating, according to Grobber (2002), includes the halo effect and problems with regard to leniency and strictness. Aamondt (1991) cited by

Khumalo (2008) states that since many managers simply do not have the time or inclination to practice management by walking around and observing their subordinates at work, sampling errors such as the recency effect and infrequent observations, may lead to invalid and subjective evaluations. This is bound to create problems, especially when the evaluation of aspects that fall outside the classroom observation is considered.

Some scholars suggest non-commitment on the part of the DSG. Khumalo (2008) warns that the DSG needs to take its roles seriously, so that the school gains maximum benefit from the appraisal process. The DSG needs to contribute positively to the personal and professional development of appraisees. In the appraisal process, appraisees will require ongoing support in order to gain maximum benefit from the process. Such support might come from one of the senior management team members, a member of the DSG, who is also a mentor. The appraiser should also create a non-threatening atmosphere in which teachers are encouraged to experiment. Support is rendered in a variety of ways like coaching, motivation, and demonstration (Ibid).

Khumalo (2008) also mentions that in a participative/democratic management style all role players are seen to be important in the school development process. All concerned need to account for their involvement in the process. In order for the DSG to be fully accountable for the evaluation process, the DSG needs to have a clear and thorough understanding of its roles and responsibilities. Bush and Westburham (1994) cited by Khumalo (2008) state that in education accountability amounts to being required to give an account of events or behaviour in a school to those who may have a legitimate right to know. Khumalo (2008) also cites Van Niekerk (2001) who takes this further. Accountability occurs by means of some form of reporting system. It can consist of such things as minutes of meetings, written reports at stipulated times and evaluation reports. The DSG need to keep records of the proceedings at meetings held about pre and post evaluation discussions.

For the DSG to be truly accountable, according to Van Niekerk (2001) in Khumalo (2008), it is necessary for them to take ownership of their role and the task that it implies. When this happens, accountability becomes a personalized issue. It contributes to the successful fulfilment of the person's role and task in an organization such as a school. People who accept ownership of their roles are motivated to reach outcomes that they have set for themselves, and more.

## **2.4 ROLE OF PRINCIPAL IN THE IMPLEMENTATION OF IQMS**

The principal's role in the implementation of the IQMS is discussed to show what is expected of him/her, and ultimately to find out if these expectations are met. Besides the many other leadership roles that the principal has to play, he/she must work together with the DSG "to ensure fairness and consistency in the evaluation process" (Department of Education, 2003:1). This study would also attempt to find out if the principal's role is being fulfilled.

Bush, Joubert, Kiggundu and van Rooyen (2009) cite Sallis (1999) who state that the main reason for the failure of quality initiative is the lack of senior management's backing and commitment. Without leadership backing at all levels of the institution, the improvement process cannot be sustained. It is therefore imperative for the principal and DSG to work hand in hand to ensure that the evaluation process takes place in the manner expected. The principal, according to Bush et al. (2009), should share this responsibility with the School Management Team (SMT). The aim is to give support to the DSG, to supply the necessary skills/competencies and to give the DSG strength that would enable it to continue doing its job in the face of many challenges (Hawkins, Weston and Swanell, 1991).

Bush et al. (2009) support Sallis (1999) because they have noted that managing teaching and learning is one of the most important activities for principals and other school leaders. They stress that the core purpose of principal-ship is to provide leadership and management in all areas of the school. This enables the creation and support of conditions under which high quality teaching and learning take place. It promotes the highest possible standards of learner achievement.

To support this idea, Bush et al. (2009) further cites Bush and Glover (2009) who have noted that overall management of teaching and learning is regarded as a key role for South African principals as reflected in the South African Standard for principalship. The principals' responsibilities should include setting the framework for effective teaching and learning. Principals should develop policies to address this issue. They must ensure that curriculum delivery is implemented successfully. Their role is to take a school-wide view. Principals have a direct responsibility for the quality of learning and teaching and for pupils' achievement. This implies setting high expectations and monitoring and evaluating the effectiveness of learning

outcomes. It is necessary for the principals to know good instruction when they see it, to encourage it when they do not and facilitate on-going learning for staff.

According to the Employment of Educators Act of 1998, section 4, and Government Notice 19767 of 1999, the duties and responsibilities of a principal, deputy principal and Head of Department (HOD) are:

*“To guide, supervise and offer professional advice on the work and performance of all staff in the school and, where necessary, to discuss and write or countersign reports on teaching, support, non-teaching and other staff. To participate in agreed school/educator appraisal processes in order to regularly review their professional practice with the aim of improving teaching, learning and management”*

The ELRC provides the overall responsibility of IQMS implementation in the school, as well as the role to be played by the principal. It is the duty of the principal to see to it that all staff members receive the necessary documents and training. The principal must organise workshops on the IQMS where individuals can have the opportunity to clarify areas of concern. It is also the responsibility of the principal to ensure that a staff development team is established and that all the necessary documentation is submitted to the district office on time. Evaluation results must be internally moderated by the principal.

## **2.5 SOME INCONSISTENCIES IN IQMS**

This sub-section makes reference to others who have done research on the IQMS and on appraisal and evaluation. By reviewing literature on inconsistencies the study hopes to identify gaps that might exist. Recommendations for further research will then be made.

De Vos et al. (2003: 368-369) speak of “program evaluation” when referring to the exposure of gaps in any program (like IQMS). Program evaluation is focused on measuring attainment of goals and objectives that is, finding out if the program is effective. When the focus is to improve the program, it is called formative evaluation. This kind of evaluation exposes weaknesses in the program and assists to improve those areas of the program which do not meet the criteria

originally set by its initiators. Monitoring the program is in essence, a kind of formative evaluation. It is therefore necessary to include a sub-section on inconsistencies in the IQMS to find out what others have to say after having conducted the program evaluation on the IQMS (Ibid).

Weber (2005) analyzed the IQMS document using discourse analysis and found that IQMS contains general statements that imply agreement among all reasonable South Africans. Weber points out that the IQMS is aimed at teachers. It does not explain by what procedures the national Education Department will be made accountable. The idea that the department has the responsibility of providing facilities and resources to support learning and teaching as outlined in the ELRC IQMS document (2003) is not followed through with explanations about what will be provided, how, who will monitor and evaluate the adequacy of the provision and the efficacy of the development of human resources. SADTU (2001) has noted that no-one and nothing will guard the guards. In other words Sadtu supports Weber (2005) in that there is no explanation as to how to hold the national Education Department accountable if it seen to be failing to meet the requirements of the ELRC IQMS document (2003).

Gardiner (2003) questioned the feasibility of identifying needs, providing support, rating performance and evaluating the entire school using the same instrument. Wits and EPU (2005) found that the teacher organizations interviewed, felt that IQMS is good on paper but a problem in implementation. Jansen (2004) pointed to the fact that the whole school evaluation policy involves everyone in school evaluation, but the staff are excluded when the final judgment on school performance is made.

Chisholm and Hoadley (2005) argue that negotiations were characterized by questions like: Who would control the whole school evaluation? What would it contain? Who would keep the records? Who would do the evaluations? Would the department be able to enter the classroom to evaluate the teacher performance? For the financial incentive carried by the IQMS as opposed to the previous one, DAS, could have contributed in teacher organizations agreeing to sign the policy, paying less attention to the grey areas.

A Report to the Portfolio Committee (2006) stated that the implementation of the IQMS started by the training of National Training Team (NTT) which trained the Provincial Training Team (PTT), which in turn trained three teachers per school. The Portfolio Committee felt that the number of teachers trained was insufficient as they have huge workloads. Training of principals was not made a priority.

The review conducted by the National Department of Education (NDOE, 2007) on the implementation of the IQMS identified challenges that included the moderation of scores, the non-integrated approach in implementing the IQMS, professional development which is not happening and the fact that the PGPs were not renewed. The pay progression of one percent to the teachers is the only success noted. The National Department of education had earlier explained to the Portfolio Committee (2006) that the department is facing some challenges in IQMS implementation. The Committee felt that the development and performance of teachers needed to be separated and dealt with by two different systems.

## **2.6 APPRAISAL AND EVALUATION**

Literature on Appraisal and Development is reviewed because appraisal and evaluation are the core business of the IQMS. It is, therefore, important to know what others have to say about appraisal and evaluation. In this way light is thrown as to how the DSG is expected to interact with the educators it is supposed to be mentoring and coaching.

Kydd, Anderson and Newton (2003) mention that schools and school leaders are experiencing a growing pressure to deliver high quality education. And there exists consensus that teachers should be encouraged and supported within the school context to develop professionally in order to deliver this high quality education. It has generally been accepted that teachers' professional development cannot be disconnected from the context within which it takes place. In the early '90s Huberman (1993), according to Kydd et al. (2003), following the research tradition of life-stage theories – described the stages of professional development. The attention he paid to the subjective meanings teachers attach to this process, allowed him to indicate which working conditions at the school level favoured professional development.

Teachers have a greater chance to enjoy a harmonious career, if they work in a school context that encourages some experimentation without the threat of punishment if one is not successful Kydd et al. (2003). The possibility of taking on new tasks without loss of wages and access to the expertise of colleagues in and outside the school are important organizational triggers for professional development. The IQMS is designed to foster this kind of development. As stated in the IQMS document, Collective Agreement No. 8 of 2003, through self evaluation, appraisal and development, the educator is supposed to strengthen his /her performance.

The IQMS document requires that the educator be developed in the areas that the educator has identified as his weakness. The educator's strengths and weaknesses should be reflected on the educator's Personal Growth Plan (PGP). Agreeing with this point, Kydd et al. (2003) argues that evaluation should be frequent and specific in order to foster development. Teachers should get accurate information about the impact and effects of their work. This leads to feelings of efficacy and a greater commitment to professional development. The evaluation, in other words, should be investing. It should reward teachers for development, for taking risks and for change, instead of only looking at the successes of the past. A good evaluation should encourage teacher's professional development by confronting them with new challenges (Ibid).

Monyatsi, Steyn and Kamper (2006) concur with the above argument. They studied teacher perceptions of the effectiveness of teacher appraisal in Botswana. They have stressed that the importance of appraisal in any organization cannot be overemphasized. They have noted that the major aim of teacher appraisal is to develop teachers in order to improve their delivery in schools. Literature on staff appraisal has identified three main purposes of appraisal: to serve as a basis for modifying behaviour to realize more effective working habits; to provide adequate feedback to each employee on his/her performance; and to provide managers with data with which to evaluate future assignments and determine compensation (Ibid).

Monyatsi et al. (2006) correctly point out that the main objective of teacher appraisal is to improve individual performance and motivation. Evaluating the effectiveness of the system encompasses a wide scope, including the perceptions of those appraised and the perception of appraisers themselves. Since the introduction of the current teacher appraisal system in the form of the IQMS in 2003 in South Africa, very little research has been carried out to determine

whether the DGS, which has been given the responsibility of evaluating teachers, is coping with this task.

Although Bush, Joubert, Kiggundu and van Rooyen (2009) wrote an article on ‘managing teaching and learning in South African Schools’, which is fundamental to the IQMS, their emphasis is on the SMT, one of the structures that are supposed to be working hand in hand with the DSG, and not the DSG, which plays a key role in IQMS implementation, and is the focus of this study. Likewise Smith and Greyling (2006) in their exploratory study ‘Empowerment perceptions of educational managers from previously disadvantaged primary and high schools’, do not actually mention the DSG. De Clercq (2009) on ‘School Evaluation’ looks at the challenges of school change and the conceptual framework and assumptions of using accountability and support as improvement tools. There is no mention of the DSG as part of the structures in schools that is involved in the evaluation system.

This study looks at the experiences and perceptions of the appraisers, the DSG. Monyatsi et. al. (2006) maintains that if employees are to perform effectively, they must be well motivated, understand what is expected of them and have the ability and skill to fulfil their responsibility. The question that comes to the fore is: ‘What are the challenges of the DSG in implementing the IQMS?’

Mokgalane, Carrim, Gardiner, and Chisholm (1997) assert that any program of appraisal requires that attention should be paid to the conceptualization, the process of its implementation, and ultimately its impact. They claim that the process of conceptualization and implementation is as important as its end product. This idea is supported by Bollington, Hopkins and West (1990) who have observed that a properly constructed and presented appraisal system could improve the professional development of teachers and management of schools. The Department of Education (2006) also agrees when it says that teachers need to be developed and capacitated for the attainment of quality learning and teaching. The improvement of a school depends on the improvement of its educators. Agreeing with this point Middlewood (2001) has noted that the actual performance of teachers is critical to the success of education in South Africa, hence the adoption of the IQMS in 2003, as a national instrument to evaluate teachers and schools.

Thurflow (2001) has seen the introduction of an appraisal instrument as promoting educator effectiveness and educator professionalism. This research attempts to find out to what extent is Thurflow's assertion true with regard to the implementation of the IQMS in schools.

A survey conducted by Seldin (1999) reports that bias and unreliability characterize peer observation and suggests an array of approaches to maximize the effectiveness thereof. Seldin (1999) further observed increased institutions that are using peer observation of teaching as part of their evaluation. Seldin (1999) claims that a survey by Seldin (1998) indicates that 40.3 percent of colleges and universities use peer classroom observation for summative evaluation. As a result, according to Seldin (1999), there is increased interest in assessing and ensuring its effectiveness as a reliable and valid tool for high-stake decisions such as tenure and promotion. Research on current practice indicates that often peer classroom observation is neither a reliable nor a valid tool as it is currently used.

Seldin (1998), according to Seldin (1999), also emphasizes the importance of empowerment through human resource management. He suggests that reliability can be increased through the training of observers including what criteria to use, how to apply them, observational skills, record keeping, and how to provide constructive criticism. Seldin (1999) further suggests that it is useful to base conclusions on more than one observation by more than one observer. The process should be based on consensus about what constitutes good teaching in the discipline with a focus on shared criteria for teaching effectiveness including the elements colleagues can best judge. The process should be consistent for all instructors and observers. The rules of the game should be known to all the instructors and observers, reviewers or personnel committee, and the department administrators should all know the purposes and processes that will be used. The instructor should have input into the process at several stages (e.g. the selection of observers, selection of class to be observed, interpretation of the classroom experience after the observation input into the written report). A validated observation instrument should be used. Each of these dimensions offers a rich opportunity for improving the process (Ibid).

Collaboration between the Department of Education, University of Fort Hare, Imbewu 2 and Africa University in Zimbabwe has resulted in the creation of innovative pilot program which could revolutionize education at schools. The Education Leadership, Management and

Development Program (ELMD) feature South African Qualifications Authority (SAQA) accredited courses and seeks to empower educationists and communities in developing and managing their schools, and to act as change agents in the community (Umdibanisi, Vol. 1 No. 13 August/September, 2004). Participants for the program are nominated from the ranks of school governing bodies, principals and senior teachers as well as district education officers. Pilot districts exposed to the program since July 2003 are Libode, King Williamstown and Grahamstown.

Chapman (2010) stresses that focus should be on developing the person and not the skills. There should be an effort to try and see things from the perspective of the person and provide learning and experiences that they would like for their own personal interest, development and fulfilment. Performance and capability are ultimately dependent on people's attitude and emotional maturity. Help them to achieve what they want on a personal level, and this provides a platform for trust, emotional contracting with the organization and subsequent skills, processes knowledge development relevant to managing higher responsibilities, roles and teams (Ibid).

Participative workshops work well in beginning this type of attitudinal development. People should be involved right from the start and focus on what they want. A personal development questionnaire could be used to begin to set the scene and provide examples for alternative learning opportunities. It starts with the person and not the skills. It is about attitude and emotional maturity.

Chapman (2010) argues that when people develop confidence, integrity, develop emotionally, they automatically become pro-active, solution-focused, responsive etc., which across the whole team has a cumulative effect. So many people at work are simply going through the motions, acting in a conforming state, often because they feel insecure, lack confidence to do what they think is right, or are nervous about being bold, whereas boldness is essentially required for self-sufficiency, initiative, greater responsibility, and, in fact, all the behaviours organizations strive to encourage.

Boldness cannot be taught. People have to experience things which enable them to feel bold, to take risks, and to want to take risks. This means rewards must be there too or people have no

reason to stick their necks out. Not just the prospect of financial reward, but more importantly, real extra responsibility and involvement in new successful and interesting projects. This is the fuel of people's growth and change.

## **2.7 WHOLE SCHOOL EVALUATION**

Literature on WSE is reviewed because the policy on WSE evaluates the people in the schools and their activities in relation to quality management. One can say that WSE serves as watchdog over the IQMS and 'inspects' the effectiveness of the IQMS on all the twelve performance standards. In the meanwhile, the Department of Education remains committed to the shift from 'inspection' to WSE (Department of Education, 1995).

The Department of Education (2000) states that the National Policy on Whole-School Evaluation is designed to achieve the goal of school improvement through a partnership between supervisors, schools and support services at one level and national and provincial governments at another. The policy is aimed at ensuring that all schools in the country are evaluated according to a uniform national level. Whole-school evaluation encapsulates school-evaluation as well as external evaluation. The focus is on both internal monitoring and external evaluation, i.e. self-evaluation by the school and the external evaluation by the supervisory units, and the mentoring and support provided by the district-based support teams. Whole-school evaluation also provides for schools to receive advice and support in their continual efforts to improve their effectiveness. As a process whole-school evaluation (like the IQMS) is meant to be supportive and developmental rather than punitive and judgmental (Department of Education, 1995).

The Department of Education (1995) has stressed that WSE is aimed at improving the overall quality of education in South African schools. Its main purpose is to facilitate improvement of school performance through approaches of partnerships, collaboration, mentoring and guidance. A mechanism for reporting findings and providing feedback to the school and to various stakeholders on the level of performance achieved by the schools is also built into the process.

The Department of Education (1995) is aware that quality assurance systems like the IQMS rely on (WSE) to make meaningful interventions that can raise standards of performance and improve

learner achievement. At present many schools are underperforming, producing between 0- 20 percent matric pass rates. Successful implementation entails establishing quality assurance systems that promote school effectiveness. The argument is that schools that aim for quality assurance will achieve higher standards than schools which merely respond to quality control. School effectiveness and educator professionalism is one of the priority programs of the Department of Education. In terms of the Tirisano implementation plan, (January 2000-December 2004) the WSE plays a key role in seeking to:

- Introduce a rigorous accountability system (to see how well each school is doing, how it compares with other schools and if it is meeting requirements or reaching certain standards).
- Improve the quality of teaching and learning as well as standards achieved in schools – since schools are able to identify their strengths and weaknesses in order to target interventions.
- Monitor the progress of education transformation – both in terms of how successful the new policies are proving to be.
- Identify pockets of excellence within the system which will serve as models of good practices to be cascaded.
- Improve the general understanding of what factors create effective schools.

The Further Education and Training (FET) Act (Act no. 98 of 1998), makes it obligatory for the Director-General, subject to the norms set by the Minister, in terms of the National Education Policy Act, to assess and report on the quality of education provided in FET band.

The South African Qualifications Authority (SAQA) Act of 1995 requires that Education and Training Quality Assurance (ETQA) bodies be established for the purposes of monitoring and auditing achievements in terms of national standards and qualifications. The whole school monitoring and evaluation process will occur within these legal stipulations.

In this context, the notion of WSE is used to refer to all those services whose main function is to control and evaluate and advise and support schools in their continual effort to improve their performance. The focus is on the external monitoring and evaluation i.e. on the work done by the

education district officers, circuit managers, subject advisors, curriculum facilitators, education guidance and counselling, etc. These officers are located outside the school. In the long run external monitoring and evaluation needs to be complemented by school-based evaluation strategies (that are enhanced in the IQMS). This requires extensive capacity building programs.

The purpose of quality assurance is to monitor and evaluate national standards. At the national level the quality assurance unit develops the national framework for school evaluation, together with the appropriate instruments. The purpose is to assess the progress being made by schools in meeting national policy and goals. Complimentary to the work of the national department are the reviews coordinated at the provincial level and managed through the district office. As quality management systems at the school level become better- established with schools accepting the new culture of self-monitoring and evaluation, they will conduct their own internal reviews. Not only is self-review likely to be more cost-effective than the more elaborate externally-driven evaluation activities, but through it, schools can truly become learning organizations.

The Department of Education is committed through its mission to “ensure that all South Africans receive life-long education and training of high quality” (Department of Education, Corporate Plan, 1996:8).

But, de Clercq (2009) on ‘School-Evaluation’ argues that the strategies that have been engaged in South Africa to improve schools have had little impact. Non-governmental organizations have worked on school intervention programs since the early 1990’, and so have the national and provincial education departments since 1994. The picture that emerges is not a positive one. Limited results have been achieved and sustained, especially in struggling schools. Taylor (2002; 2006) in de Clercq (2009) has argued that this picture is disappointing given the number of people, time, effort and money invested in these school interventions. The policy is based on a flawed conceptual understanding of how accountability and support work in schools. It asserts that an appropriate quality monitoring system needs to be re-conceptualized, which could lay the basis for a school improvement for all South African schools.

De Clercq (2009) further argues that it is crucial to identify more suitable forms of accountability and support for South African schools so that they benefit and engage in a process of genuine school capacity building and improvement. This is especially important given the existing multiple forms of school accountability and the poor support systems available. Since 1994, South African schools have been subjected to new forms of accountabilities and demands, specifically with the WSE policy. It has been argued that the WSE is not the most appropriate policy. The majority of schools in South Africa suffer poor organizational capacity and little positive experience of accountability and support. Unless a comprehensive effective support strategy is put in place at district and institutional level, the WSE policy will not be of much benefit for the majority of struggling schools. Thus, while it is important to have a standardized instrument as a school quality monitoring instrument, such as the one contained in the WSE policy, it is unreasonable to expect this evaluation system for development to contribute to a genuine process of school improvement (Ibid).

De Clercq (2009) states that there is need for the DOE to develop an independently managed national evaluation system to enable them to take stock and compare the performance of the schooling system. De Clercq (2009) recommends that the department must revise, plan and invest resources in a more effective system of school support. District authority and capacity must be actively and urgently developed with innovative and effective strategies to assist schools to develop their internal organizational and instructional capacity. If this were done there would be a genuine basis for school evaluation to lead to a school improvement process but not through a WSE amended policy but rather through slightly different district school support and monitoring (Ibid).

## **2.8 IMPORTANCE OF HUMAN RESOURCES MANAGEMENT AND DEVELOPMENT**

Literature on Human resources Management (HRM) is reviewed to emphasize the importance of HRM in organizations, including schools. Swanepoel, Erasmus, van Wyk, and Schenk (1999) explain what HRM is all about: Human Resources Management is aimed at constantly enabling employees and their employing organizations to be in agreement, as far as possible, about the nature of the working relationship and their reciprocal expectations, and ensuring that these

expectations are fulfilled. De Jager and Nieuwenhuis (2005) state that no matter how well-resourced the organization is in terms of the material resources, the one that makes the difference must be the human resources. Therefore, the human resources aspect must be regarded as a key and critical resource. This resource must be maintained and developed by the organization. The DSG is cardinal to the implementation of the IQMS. This study attempts to find out how the experiences of the DSG will show that this resource is managed, developed and nurtured. The purpose of this study is to find out if the DSG that is tasked with the task of evaluating other teachers can cope with the task (cf. Chapter 1.3).

De Jager and Nieuwenhuis (2005) state that concerns that the education system cannot adequately prepare learners for life in the 21<sup>st</sup> century have prompted people across the world to explore ways of redesigning education systems. This resulted in a significant trend operating in the world today, the outcomes-based education (OBE). The IQMS, gazetted by the ELRC (2003) and adopted by the Department of Education (2003) is an attempt by South Africa to improve the quality of learning and teaching. De Jager and Nieuwenhuis (2005) correctly point out that the development of performance standards, which is a significant feature in the IQMS, and the identification of outcomes, are highly relevant to quality management in educational systems. Organizations, including schools, must have staff development programs (De Jager and Nieuwenhuis, 2005; Banks and Mayes, 2001; Keith and Girling, 1991).

IQMS procedures and processes as portrayed in the ELRC IQMS document (2003) enforce development programs. The PGP helps to identify the development areas of the individual educator. These are compiled into a school improvement plan for SDTs (Staff Development Teams) to draw up a development program for the educators. Riches and Morgan (1994) state that Human Resources Management (HRM) in any organization – education or otherwise – is part of management in general. HRM is focused on the people side of management, seeking to ensure that the objectives of the organization, whether factory, hospital, school or college, are met. Many see HRM as the art of getting things done through key resources – the people.

Riches and Morgan (1994) correctly point out that of all the resources at the disposal of a person or organization, it is only people who can grow and develop and be motivated to achieve certain desired ends. The attainment of targets in the organization is in their hands and it is the way

people are managed that the maximum performance is matched as closely as possible with satisfaction for the individual doing the performing. This is at the heart of HRM and optimum management. It is this kind of relationship between the organization and the people working in it that Middlewood and Lumby (1998) talk about when they refer to a symbiotic relationship between the individual performance and the organizational effectiveness.

Swanepoel et al. (1999) observes that the need to initiate changes in employee practices represents a major challenge for the Human Resources Department. This is their prime role and the place where they make major contribution to the organization. The changes relate to models of human resources management such as selection, motivation training, and performance management and reward (Riches and Morgan, 1994; Swanepoel et al., 1999). Riches and Morgan (1994) point out that HRM has its so-called operative functions which include recruitment and selection, appraisal and development, but its scope of activities is even wider. It is involved in helping to improve human performance within an institution with the longer term planning and development of human resources. HRM is the effective and efficient use of human resources which is the key to successful outcomes, that is, optimum performance.

Supporting this idea Bush and Middlewood (1998) have stressed that effective teaching and learning cannot be achieved without effective management of the people who work at school. The people working at school are its most valuable resource. The Department of Education (1995) shares the same sentiment that every school manager must constantly be seeking ways to help people grow to their fullest potential. The most successful organizations are places where everyone is expected and expects to be growing, changing and learning all the time. This is why Banks and Mayes (2001) speak of educators as life-long learners.

De Jager and Nieuwenhuis (2005) state that HRM functions include motivation and supervision of the employees, job design, manpower planning, recruitment, selection, placement, orientation of new employees, performance appraisal, training and development, career planning and guidance, promotion, demotion, discipline and review, health and safety compensation. All the above-mentioned functions have a direct or indirect impact on employee job performance. The HRM functions are interrelated, and therefore these must work together as a system. Training is the key issue in quality management. This view is supported by Nel and Haasbroek (1998) who

hold that effective training and development by the organization is necessary to ensure that employees achieve the maximum level of competence.

Shapiro (2010) sees the recruitment, selection, and training as the major part of the HRM department in any organization. Recruitment is the process of identifying that the organization needs to employ someone up to the point at which application forms for the post have arrived at the organization. The recruitment process is the first step towards creating the competitive strength and the strategic advantage for the organizations. Recruitment processes involve a systematic procedure from sourcing the candidates to arranging and conducting interviews. It requires many resources and much time. A vacancy must be identified, job description prepared and person specification. The vacancy must be advertised and responses managed: Short-listing, arrangement of interviews, conducting interviews and ultimately decision making (Ibid).

Selection consists of the process involved in choosing from the applicants, a suitable candidate to fill a post. Training consists of a range of processes involved in making sure that job holders have the right skills, knowledge and attitudes required to help the organization to achieve its objectives. Recruiting individuals to fill a particular post within a business can be done either internally, by recruiting within the firm, or externally by recruiting people from outside. External recruitment makes it possible to draw upon a wider range of talent, and provides the opportunity to bring new experience and ideas into the business. Internal promotion acts as an incentive to all staff to work harder within the organization. The disadvantage with internal recruitment is that an insider may be less likely to make the essential criticisms required to get the company working more effectively (Shapiro, 2010).

These functions are an echo of the definition of HRM given by Flippo (1990) who has defined HRM as nothing else but ways and means, and methods of stimulating a will to work productively and cooperatively. Managers should become leaders and coaches, not bosses and dictators. Suggestions made by non-managers should be taken seriously. Quality of life must change continually and go forward from initial problem solving to an actual partnership between management and workers. Quality of life cannot be mandated unilaterally by management hence the Department of Education (2003), ELRC (2003) promote democratic participation of educators in the IQMS.

Banks and Mayes (2001) have stressed that an educational institution's approach to professional development will depend on whether it views employees as a resource or a cost-commodity, its view of adults as lifelong learners, its educational goals and preferred methods of achieving them. In each school the aim of professional development is to improve practice in the classroom. As Loock, Grobbler, Benni and Mestry (2006) have observed, educational managers at every level are under pressure to ensure that employee performance conforms to expectations. School principals and governing bodies need knowledge and understanding of resource management models and their relevance to educational management in order to establish institutional autonomy and move towards self-managed schools.

Public organizations in our country are at pains to increase productivity among employees (Grobbler, Warnich and Carrell, 2007). Carrel, Nobert, Elbert and Hatfield (1995) have noted that one of the biggest challenges facing South Africa since its re-entry into the international community is its labour productivity. The above view is supported by Nel and Haasbroek (1998) who state that South Africa is faced with the enormous challenge of increasing productivity among workers. Schools are no exception to this. There is a growing concern in the Department of Education over the quality of education and solutions are being sought to improve teaching practices. One of the attempts towards improving teaching practices was the appointment of the review committee (RC) by the then Minister of Education, Professor S.M.E. Bhengu (Department of Education, 1995).

The Review Committee (1995) defines capacity as the power to act, and capacity-building as empowerment. Schermerhorn, Hunt and Osborn (1997) refer to empowerment as the process by which managers help others to acquire and use the power needed to make decisions affecting themselves and their work. To Robinson, Odendaal and Roodt (2003), empowerment is a multi-dimensional concept. It consists of three broad facets: subjective aspect, which is psychological, development of self-efficacy, motivation, entitlement and self-confidence and the objective aspect. The objective aspect entails opening up opportunities for the individual. Exposure to exercise leadership, decision-making, job-enrichment and more challenges. To Smith and Greyling (2006) training and development aspect entails competence – growing of knowledge, skills and experience. Joining hands with the above on empowerment, the Department of

Education (1995) has stressed that school managements, school governing bodies and district education officials must be empowered to implement the new system of democratic management and governance effectively.

The Review Committee (1995) has reported that democratic institutional management makes considerable demands on school principals and their teachers. The department must ensure that effective in-service programs on essential administrative processes like record-keeping, budgeting, financial control, reporting, staff selection and running meetings are provided, and that these embody the spirit of the new democratic education policy. The Review Committee (1995) places high value on the role of district education offices and their officials. They are the closest contact with schools. They provide professional leadership and support to school principals, teachers and governing bodies. They monitor their development and identify priorities for resourcing. They facilitate cooperation among schools and coordinate the use of specialist personnel, advisory services, teachers' resource centres, and community learning centres. They provide administrative service to district-level consultative bodies. To perform these adverse roles effectively, district education officials themselves, need professional knowledge and skills of school management and governance (Ibid).

The Review Committee (1995) has also recommended that the provincial departments have capacity-building units. These will identify the priorities and develop and implement the programs for district and school management and governance in close collaboration with stakeholders including teachers' and parents' organizations. Finally, the committee has proposed that consideration be given to the establishment of a national Education Management Training Institute to serve national, provincial and sub-provincial management and governance.

All these endeavours recognise that the attainment of quality learning and teaching can only be achieved through the empowerment of the people involved. Jones, Jenkin and Sue (2006) join many others by emphasizing that staff members are the most important resource for improvement that schools have at their disposal. In the implementation of IQMS the DSG is fundamental to make the program effective and therefore must be empowered. Supporting this view, Mokgalane et al. (1997) emphasize that all parties who form part of the evaluation process should be empowered to perform this task. This will motivate and give the parties confidence

and will own the process from the very beginning, armed with knowledge which is defined by Hawkins, Weston and Swanell (1991) as a body of organized information.

## **2.9 CONCLUSION**

### **2.9.1 Linkage between Total Quality Management (TQM) and the IQMS**

Literature on linkage between TQM and the IQMS is discussed to show that schools must not be divorced from other organizations in respect of quality services and products. This serves as the conclusion to this chapter.

The development of performance standards and the identification of outcomes are highly relevant to quality management in both educational systems and the large organizations. The DSG is using these performance standards to evaluate educators in the implementation of the IQMS. Each of the Performance Standards asks a question (See Appendix 1) and each Performance Standard includes a number of criteria. For each of these criteria there are four descriptors which are derived from the four point rating scale. Appendix 1 is the instrument used by the DSG to assess educators in IQMS implementation.

TQM is in part about processes but, more importantly, it is about attitudes and TQM places quality as the primary objective within the organization. Fundamentally, one of the notions of TQM embraces the principle that organizations should listen to those whom they serve, continually evaluate how well they are responding to the needs of their constituencies and initiate change to meet the expectations of these groups. TQM is a management system driven by top management acquiring the absolute commitment and involvement of everybody in the organization and focuses on increased customer satisfaction. Furthermore, TQM consists of continuous improvement activities, involving everyone in the organization in a totally integrated effort towards improving performance at every level. TQM is a tool for leaders that strongly support continuous change in the organization, as organizations working with it, unceasingly strive towards their own improvement rendering in a dynamic system (De Jager et. al., 2005).

TQM is a totally integrated effort to gain a competitive advantage by continuously improving every facet of the organization culture. TQM focuses externally on meeting customer

requirements and internally on management commitment and employee training and education. TQM is concerned with moving the focus of control from outside the individual to within. The objective is to make everyone accountable for their own performance and to get them to commit to attaining quality in a highly motivated fashion. Because TQM is proactive in nature, its aim is to build quality into the product, service and design of the process and then to continually improve. Furthermore, each institution should be a learning organization focusing on the individual development of the learner as well as the empowerment of staff (De Jager et. al. (2005).

Literature reviewed has shown that people working in an organization are the most important resource. People in an organization are the only resource that can learn and grow. This growth must be planned, encouraged and maintained. Schools are no exception. Professional growth must be a deliberate exercise in order to achieve quality learning and teaching.

Literature reviewed has also shown that the introduction of the IQMS was to fill in this gap – attainment of quality learning and teaching through educator development. It has shown that training of the implementers of any program is vital. Empowerment of all the implementers therefore, is of vital importance, particularly the DSG because it is the one doing the spade work.

The literature reviewed has shown that organizations must take pains to develop the people working in the organization in order to attain quality. Schools are no exception. The study therefore must attempt to find out the extent to which this kind of development has taken place to the DSG.

## **2.10 SUMMARY**

This chapter has provided an overview of literature and research that has a bearing to this study. The most important aspects have been included. For instance, literature on the implementation of the IQMS had been reviewed to form a base to review literature on the next sub-headings in this chapter Role of DSG, to place the DSG in the system of evaluating teachers in the Department of Education, Role of principal, as one who must work hand in hand with the DSG at school, Some inconsistencies in IQMS to make reference to others who have done research on IQMS, Appraisal and Evaluation as the core business of the DSG in the implementation of IQMS, WSE

as one component of IQMS that is rather neglected or mentioned in passing in the IQMS document, HRM, to show how important HRM is in organizations and in particular, in empowering the DSG, Relations between the educator and the DSG, in order to find out what others say about the relationship and relations between the two.

The chapter is concluded with the linkage between TQM and the IQMS because the core business of both the processes is attainment of quality products and services and continuous development of each employee's skills.

The next chapter is going to detail the methodology and methods used in this study to collect data from the participants.

## **CHAPTER 3**

### **METHODOLOGY AND METHODS**

#### **3.1 INTRODUCTION**

The literature reviewed in the previous chapter has shown that it is important to empower the people who are implementers in any program if quality is to be attained. It has been emphasized that schools are no exception. The expectation, therefore, is that the DSG must be empowered in order for anyone to expect quality services from them. This study seeks to investigate experiences of the DSG when implementing the IQMS in schools. The problem that this study aims to address is whether the DSG that is faced with the task of evaluating educators in order to identify strengths and weaknesses is able to cope with this task. The question that the study attempts to answer is: What are the experiences of the DSG in the implementation of the IQMS in Butterworth district?

In this chapter the methodology used to conduct the study is discussed. This includes the research paradigm, the research design, the sample and sample procedures, data collection and procedures, data analysis, reliability and validity, ethical considerations and a conclusion in the form of chapter summary is given.

#### **3.2 RESEARCH PARADIGM**

In this study interpretivism, a qualitative approach paradigm was used to investigate experiences of the DSG when implementing the IQMS in schools. Groenewald (2004) has defined paradigm as the patterning of the thinking of a person. It is a model to follow according to which design actions are taken. Differently stated, a paradigm is an action of submitting to a view. Groenewald (2004) traces 'paradigm' back to its Greek (paradeigma) and Latin origins (paradigma) meaning pattern, model for example. This definition is supported by Denzin and Lincoln (2000) who define a research paradigm as a basic set of beliefs that guide action dealing with first principles, ultimate's or the researcher's world views.

The researcher has engaged a number of characteristics that describe a qualitative paradigm. The researcher in this study is committed to description rather than explanation. Reality is presented through the eyes of the participants. The meaning of experience and behaviour is viewed in its context and in its full complexity. Emergence of concepts from data is emphasized rather than imposition in terms of a priori theory. Qualitative methods are privileged within the naturalistic approach because they are thought to meet a number of reservations about the uncritical use of quantification in social practice. The researcher chose the qualitative paradigm, for instance to guard against the problem of inappropriately fixing meanings where these are variable and renegotiable in relation to their context and the neglect of the uniqueness of human experience (Hammersely, 1996).

In this study the researcher explored and interpreted the experiences of the DSG when implementing the IQMS in Butterworth District. A qualitative research paradigm according to Denzin and Lincoln (1998; 2003) involves an interpreter, naturalistic approach to its subject matter, the idea which is supported by de Vos (2002). De Vos (2002) states that the interpreter and naturalistic approach elicits participants' accounts of meaning, experiences or perceptions and produces descriptive data in the participants' own written or spoken words. Hence the researcher went to the schools to have a conversation with the participants with regards to their experiences when implementing the IQMS. By so doing the researcher was able to identify the participants' beliefs and values about being part of the evaluation system in the Department of Education by way of implementing the IQMS. Interpreter and naturalistic approach, identifies the participants' beliefs and values that underlie the phenomena which, according to Silverman (2006), are simply unavailable anywhere. This view is shared by Hammersely (2000), McMillan and Schumacher (2001), Cohen, Marion and Morrison (2000), Terre Blanche and Durheim (1999).

This study looked at the experiences of the DSG when implementing the IQMS. The study therefore, falls within the qualitative paradigm because of the nature of the research question that says: How does the DSG experience the implementation of the IQMS in Butterworth district? The research was conducted in schools which constituted a natural setting. The researcher attempted to make sense of or interpret phenomena in terms of the meanings the DSG brought to

them as Denzin and Lincoln (1994) have pointed out. By so doing the researcher learns something new from the DSG because the DSG is the sole custodian of the information the researcher wants. Marshall and Rossman (1999) have noted that traditionally conducted research has silenced many groups marginalized and oppressed in society. The aim of the researcher by going to the participants was to hear the voice of the DSG with regard to the experiences they were facing when implementing the IQMS. Seemingly they were silent or silenced in the implementation of the IQMS. As evaluators the DSG's work involves mentoring and coaching. This means that there may be challenges that need to be dug out and brought to the surface and try to find solutions for them.

In their definition of qualitative methods Denzin and Lincoln (1994) have echoed McMillan and Schumacher (1993) who stated that qualitative methodology is a naturalistic inquiry describing and analyzing people's individual and social actions, beliefs, thoughts and perceptions. Later Denzin (1999) is still of the opinion that knowledge is not only constructed by observable phenomena, but also by description of people's intentions, beliefs, values and reasons, meaning-making and self-understanding. Agreeing with the above authors Henning, (2001) states that interpretive research attempts to understand phenomena through the meaning people assign to them. It is for this reason that the researcher embarked on this study. The researcher wanted to understand the participants through the meaning they assigned to their experiences, and not through the meaning assigned by the researcher, who happens to be employed by the Department of Education in the IQMS section in another district.

Denzin and Lincoln (1994) also state that qualitative research involves the studied use of a variety of empirical materials – case study, personal experience, introspective, life story, interview, observational, historical, interactional, and visual texts – that describe routine and problematic moments and meaning in individuals' lives. In this study interviews were conducted to derive the participants' personal experiences when implementing the IQMS in Butterworth district.

The researcher through this qualitative study has tried to take the reader into the multiple and complex dimensions of experiences of the DSG when implementing the IQMS. Creswell (1998:) claims, "I emphasize a "complex, holistic picture," a reference to a complex narrative that takes

the reader into the multiple dimensions of a problem or issue and displays it in all of its complexity. This is Creswell's definition:

*“Qualitative research is an inquiry process of understanding based on distinct methodological traditions of inquiry that explore a social or human problem. The researcher builds a complex, holistic picture, analyzes worlds, reports detailed view of informants, and conducts the study in a natural setting”.*

It is in Chapter four of this study, where this holistic picture that has been built by the researcher from the data is given. As stated below in Mbaliswa (2005), data has been analyzed inductively because the researcher described analyzed and interpreted data from the participants. The picture given in Chapter four is actually what transpired from the interviews and analysis. The participants explained why things were happening in the manner they were happening and what that meant to them.

Mbaliswa (2005) cites Bogdan and Biklen (1994) who have seen qualitative methodology as primarily attempting to describe and secondarily to analyze. In agreement with the above authors Bogdan and Biklen (1994) in Mbaliswa (2005) table the following features for qualitative research methodology: The natural setting is the data source and the researcher is the key data-collection instrument. It attempts primarily to describe and only secondarily to analyze. The concern is with subjects i.e. with what has transpired, as much as with product or outcome. Its data are analyzed inductively, as in putting together the parts of the puzzle. It is essentially concerned with what things mean, i.e. 'why' as well as the 'what'.

Sherman and Weber (1988) sum up the above discussion. They indicate that the aim of qualitative research is not verification of a predetermined idea, but discovery that leads to new insights. This study attempted to describe and analyze the experiences of the DSG when implementing the IQMS which led to the new findings tabled in Chapter 5.

Qualitative paradigm has been found to be suitable for this study because the study looked at the lived experiences of the DSG. The study also looked at what was happening and why things were happening the way they were happening. The researcher sought to gain a deep level of

understanding of a specific group, the DSG. More specifically, this research focused on the understanding of the DSG's experiences and perceptions of its role in the implementation of the IQMS from a standpoint of their unique context and background.

### **3.3 RESEARCH DESIGN**

A research design refers to one's overall research approach with regard to the problem under investigation (Imenda and Muyawanga, 2000). Mouton (1996; 2003) further defines research design as a blueprint of how you intend conducting the research.

The research design in this study was phenomenology. Phenomenology design was chosen because it suited the qualitative paradigm of the study. Swanson and Wojnar (2007) explain that at the core of phenomenology lies the attempt to describe and understand phenomena as explained by individuals who have lived them. Groenewald (2004) supports Swanson and Wojnar when he states that the operative word in phenomenological research is 'describe'. The aim of the researcher was to describe as accurately as possible the phenomenon refraining from any pre-given framework, whilst remaining true to the facts. Phenomenologists are concerned with understanding social and psychological phenomena from the perspective of the people involved. The aim of phenomenology is the return to the concrete, captured by the slogan 'back to the things themselves' (Groenewald, 2004). A student of Husserl, Martin Heidegger (1889 – 1976), introduced the concept of 'Dasein' or 'Being there' (Groenewald, 2004).

Embree (1992) identifies seven unique perspectives: A descriptive (transcendental constitutive) phenomenology that is concerned with how objects are constituted in pure (transcendental) consciousness, setting aside questions of any relationship to the world in which it lives. Naturalistic constitutive phenomenology that is concerned with how consciousness constitutes things in the world of nature, assuming that consciousness is part of nature. Existential phenomenology that is concerned with concrete human existence, includes the issue of free choice of actions in life situations. Generative historic phenomenology that is concerned with how meaning, as found in human experience, is generated in historic context of collective human experience over a period of time. Genetic phenomenology is concerned with the genesis of meaning of things within individual experience. Hermeneutic (interpretive) phenomenology is

concerned with interpretation of the structures of experience and with how things are understood by the people who live through these experiences and those who study them. Realistic phenomenology is concerned with the structures of consciousness and intentionality, assuming they occur in a world that is to a large degree external to consciousness (Groenewald, 2004).

The two approaches which guide the majority of researchers are descriptive and hermeneutic (interpretive) phenomenology because they are concerned with understanding phenomena foundational to the researched topic (Wojnar and Swanson, 2007). It is for this reason that the researcher utilized both descriptive and interpretive phenomenology for this study. The researcher explored the experiences of the DSG when implementing the IQMS through direct interaction between the researcher and the participants.

Descriptive phenomenology called on the researcher to set aside preconceptions through procedures involved bracketing. As the researcher aimed to define the experiences of the DSG when implementing IQMS, she used several frames of references including the transcendental subjectivity (neutrality and openness to the reality of others) eidetic essence (universal truths) and the lie-world plane of interaction (the researcher and participants must interact). The lived experience itself, as described by participants, was used to provide a universal description of the phenomenon. The ultimate test of the quality of a descriptive phenomenological investigation was testimony from the participants themselves that the universal description of the phenomenon captured their personal experiences (Wojnar and Swanson, 2007). In Chapter four, these personal experiences of the participants have been presented, analyzed and interpreted.

The interpretive phenomenology in this study was useful to describe the experience of the DSG in relation to historical, social, and political forces that shape meanings of their experiences when implementing IQMS, the studied phenomenon (Wojnar and Swanson, 2007).

Both, descriptive and interpretive phenomenology, have been found to be suitable for this study because the primary goal was to appreciate the holistic context of the DSGs' experiences and find meaning in what the DSG said. In the process of interaction and interpretation the researcher and participants cogenerated an understanding of the experiences of the DSG when implementing the IQMS. Phenomenologists believe that the researcher cannot be detached from

his/her own presuppositions and that the researcher should not pretend otherwise (Hammersely, 2000; Wojnar and Swanson, 2007).

Phenomenology is often considered central to the interpretive paradigm (Denzin and Lincoln, 1998; Wojnar and Swanson, 2007).

### **3.4 APPROVAL PROCESS**

The proposal for the study was first presented to the School of Postgraduate Studies at the University of Fort Hare. With the approval and support of the committee, the application for the M.Ed study was approved. The Department of Education (Eastern Cape) also approved and gave support for the study. The study was conducted in Butterworth district with the approval of and support from the District Director.

### **3.5 THE SAMPLE AND SAMPLING PROCEDURES**

The DSG was the target group in this study. Purposive sampling, therefore, was found to be most suitable for the study.

#### **3.5.1 The Population**

Mouton (1996) states that in social research the term 'population' is defined or constructed entities within the context of a specific research project. Bless and Higson-Smith (2000) take this further and state that the entire set of objects or people which is the focus of the research and about which the researcher wants to determine some characteristics is called the population or universe. Each member or object of the sample constitutes an element or unit of analysis. Specific values or quantities that relate to the population such as the average age are population parameters (Ibid).

Population in this study was government school-based educators who were teaching in Butterworth district, and were members of the DSG in their schools. These were all state schools. In South Africa, a state or government school refers to a school that is state-controlled. These are

officially called public schools according to the South African Schools Act of 1996 (Harris, 2010).

The researcher wanted to make statements and inferences about the DSGs in these schools. If it was possible, the researcher would have interviewed each and every single member of the DSG in each school in order to get accurate information (Bless and Higson-Smith, 2000). But because it was not practical or even possible for the researcher to collect information from all the people who were members of the DSG in the schools, the researcher decided to select a small number of people. The major constraints that prevented the researcher to collect data from the whole population were time, financial constraints and accessibility (Cohen, Marion, and Morrison, 2001). The researcher knew that it was possible to reach conclusions by examining only a small portion of the total group (Bless and Higson-Smith, 2000). The researcher then selected a small number of educators who were members of the DSGs in these schools. The small group is called the sample and, is representative of the DSG in Butterworth District (Rossouw, 2000).

In order to make data retrieval easy, data were stored in four separate files marked F1, F2 F3 and F4 according to the sequence of interviews that were conducted in the four schools. This was done also to facilitate analysis when the researcher would be comparing and contrasting data from different categories.

### **3.5.2 The sample**

In quantitative research, the researcher is concerned with probability sampling. Probability or random sampling refers to the case where the probability of including each element of the population can be determined. In this kind of sampling it is possible to estimate the extent to which the findings based on the sample are likely to differ from what would have been found by studying the whole population. The researcher can estimate the accuracy of the generalization from the sample to the population (Bless and Higson-Smith, 2000). Probability sampling was not suitable for this study because the researcher did not intend to generalize.

Non-probability sampling was found to be more appropriate for this study. In the words of Patton (1990:169) non-probability sampling “is selecting information-rich cases for study in depth”.

Non-probability sampling refers to the case where the probability of including each element of the population in a sample is unknown. It is not possible to determine the likelihood of the inclusion of all representative elements of the population into the sample. Some elements might even have no chance of being included in the sample. It is difficult to estimate how well the sample represents the population (Bless and Higson-Smith, 2000). The researcher who engages this type of sampling must therefore be aware. The researcher's aim must not be to generalize the findings of the study to the rest of the population.

Generalizability is a problem for field research. It crops up in three forms. First, the personal nature of the observations and measurement made by the researcher can produce results that would not necessarily be replicated by another independent researcher. If the observation depends in part on the particular observers, then it becomes more valuable as a source of insight than as proof of truth. Second, because field researchers get a full and in-depth view of their subject matter, they can reach an unusually comprehensive understanding. By its very comprehensiveness, however, this understanding is less generalizable than results based on rigorous sampling and standardized measurements. Finally, there is often a problem of generalizability even within the specific subject matter being observed. The potentials for biased sampling are endless (Babbie, 1995). That is why it is stated in the abstract that the findings of this study are limited to the DSGs of the sampled schools.

However, the researcher was aware that the non-probability samples have some practical advantages. Non-probability sampling is always cheaper and faster for homogenous populations like educators. Gathering data on a sample is less costly since the cost of research is proportional to the number of hours spent on data collection. Sampling may be the only practical method of data collection. Sampling is the practical way of collecting data when the population is extremely large. The researcher had, to some extent, reduced disadvantages of non-probability sampling by increasing the sample (Bless and Higson-Smith, 2000).

Bless and Higson-Smith (2000) is of the opinion that sampling means abandoning certainty in favour of probability. Because a large part of the population has not been investigated, statements made about the population on the basis of what has been found to be true for the

sample are, of necessity, probability statements. The target group was school-based educators who were members of the DSG in sampled schools in Butterworth district.

Out of three hundred and sixty-seven schools that participate in IQMS implementation in the Butterworth district, only DSGs from four schools were interviewed - one primary, one junior secondary and two high schools. The aim was authenticity and not quantity. The schools were in one circuit. The researcher believes that most participants come from the same cultural background and speak the same language, isiXhosa. All the participants are from the rural background because Butterworth district is mostly rural.

### **3.5.3 Purposive sampling**

A non-probability sample that conforms to certain criteria is called purposive sampling (Bless and Higson-Smith, 2000). According to Babbie (2004), this type of sampling is called purposive or judgmental sampling. Purposive sampling is a type of non-probability sampling in which the researcher selects the units to be observed on the basis of the researcher's own judgment about which ones will be most useful or representative. The researcher was interested in educators who were members of the DSG in their schools.

The researcher, therefore, handpicked three schools for the purpose of this study - one primary school, one junior secondary, and two high schools. All the schools were handpicked on the basis of knowledge of the population and accessibility. It was therefore; appropriate to select a sample from these schools because the researcher had knowledge of the whole population, and its elements. The researcher found purposive sampling appropriate for study because the researcher had knowledge of a population, and its elements and that it would suit the purpose of the study (Babbie, 2004).

Maykut and Morehouse (1994) state that in qualitative research, participants, or settings such as schools are carefully selected for inclusion. The selection is based on the possibility that each participant or setting will expand the variability of the sample. Purposive sampling increases the likelihood that variability common in any social phenomenon will be represented in the data. Patton (1990:169) speaks of "selecting information- rich cases for study in-depth". Supporting

Patton (1990) Babbie and Mouton (2001:166) state: “It is appropriate for you to select your sample on the basis of your knowledge of the population, its elements and the nature of your research aims”. The researcher in this study only wanted to understand how the DSG perceived its role and how the DSG dealt with challenges. The participants were selected on the basis of relevance to the topic under study. Participants in groups were not likely to be chosen through rigorous, probability sampling methods. This means that the participants did not statistically represent any meaningful population (Babbie, 2004).

### **3.6 GAINING ACCESS**

The researcher adopted an overt approach to gain access to the participants. The researcher approached the key individuals or gatekeepers of the setting who were willing to share her focus of inquiry (Maykut and Morehouse, 2000). In this study, the gatekeepers were school principals. The researcher drove to each school to introduce herself. With the assistance of the letter from the University of Fort Hare (See Appendix 5), the researcher introduced herself to the principals. The aim was to meet the principals, explain the purpose of the study and arrange dates to conduct the interviews. In each school, a meeting was arranged with the members of the DSG in order to explain the purpose of the study and to inform them about their rights as interviewees. This was done to build trust between the researcher and the participants.

Interviews with the members of the DSGs in this study were conducted in a room in each school. The researcher had the same culture and language as most participants. To make the setting natural, the researcher knew very well that greeting the people and holding their hands was highly appreciated in the culture of the participants. Going further to ask about their health condition, talking about drought and rainfall would make the respondents feel at ease. By these questions, the researcher was building trust and rapport with the participants (Silevu, 2009). As Maykut and Morehouse (2000) have noted, qualitative researchers are interested in understanding people’s experience in context. The natural setting is the place where the researcher is most likely to discover, or uncover, what is to be known about the phenomenon of interest. The phenomenologist seeks to discover or uncover propositions (Ibid).

Finally, the research participants were invited to review the outcomes of the study to determine whether the researcher had captured the reality of their experiences. The report given in this study was given with the participants having agreed that this was a true reflection of their experiences when implementing the IQMS. Several researchers negotiate the outcomes of their study with the research participants, and would not report outcomes that had not been agreed to by the participants (Maykut and Morehouse, 2000). The ongoing involvement with the participants highlights the importance of overt approaches to gaining access from the very beginning of the study (Ibid).

### **3.7 DATA COLLECTION TECHNIQUES**

This study used the one- on -one semi-structured interviews to collect data from the participants. Maree (2007) has observed that a number of different methods can be used to collect data from the sample of participants. Each method has advantages and disadvantages. Some methods are better in some circumstances than others. Interviewing has been found best for this study.

#### **3.7.1 Interviewing as data collection method**

De Vos et al. (2005) note that interviewing is the predominant mode of data or information collection in qualitative research. The researcher conducted interviews because the researcher was interested in the DSG's stories. Stories are a way of knowing. Telling stories is essentially a meaning-making process. Every word that people use in telling their stories is a microcosm of their consciousness. All interviews were interactional events. The researcher was deeply and unavoidably implicated in creating meanings that ostensibly resided within participants. Both parties, the researcher and the participants, were thus necessarily and unavoidably active and involved in meaning-making work (de Vos et. al., 2005). Supporting this argument de Vos et. al., (2005) cite others like Holstein and Gubrium (1995), Morse (1991) and Sewell (2001). Morse (1991) refers to conversation rather than interview, as conversation implies a discussion and captures the attitude of the interaction. The conversation had a central focus – the experiences of the DSG when implementing the IQMS - but was not one-sided. Although the researcher was engaged in a conversation with the participants, the researcher was conscious of the fact that the conversation was meant to get information from the participants. The participants were the only

ones who would have first-hand knowledge and the researcher should, most of the time, have listened and probed. Interviewing the participants involved description of the experience, but also involved reflection on the description. The researcher used the interviews to try to understand the world from the participant's point of view, to unfold the meaning of the participants' experiences, and to uncover their lived world prior to scientific explanations (Kvale in Sewell, 2001).

"Being there" is a powerful technique for gaining insights into the nature of human affairs (Babbie, 1995:302). Compared with criticisms that survey and experimental measurements are often superficial and not really valid, the researcher preferred this field research which seemed to provide more valid measures. Field research does have a potential problem with reliability. The researcher was warned of any purely descriptive measurements in the field. Even if there are those who do not agree with some of the researcher's findings, people must still find value in the researcher's study (Babbie, 1995).

The researcher chose field research because of its inherent advantage of interaction between data collection and data analysis that affords a greater flexibility than is typical of other research methods. Survey researchers, for example, must at some point commit themselves to a questionnaire, thus limiting the kind of data that will be collected. If subsequent analysis indicates that they have overlooked an important or the most important variable, the study may not be that convincing to others. The field researcher, on the other hand can continually modify the research design as indicated by the observations, by developing theoretical perspectives or change in what the researcher is studying (Babbie, 1995).

Although the researcher set out to conduct interviews with a clear idea of what the researcher wanted to ask, one of the special strengths of field research, which the researcher enjoyed was its flexibility in the field. The answers evoked by the researcher's first question shaped the subsequent ones. The researcher was well aware that it would not work, in this situation merely to ask pre-established questions and simply record the answers. The researcher asked one question, heard the answer and interpreted its meaning for the researcher's general inquiry, formed another question, either to dig into the earlier answer in more depth or to redirect the person's attention to an area more relevant to the researcher's inquiry. In short, the researcher

made sure that she would be able to listen, think, and talk almost at the same time (Babbie, 1995).

Because of the advantage of face to face interviewing, the researcher was able to make important observations aside from responses to questions asked in the interview. The researcher was able to note characteristics of the participants and the quality of interaction with them or the quality of the researcher's interaction with the participants – whether the participant had difficulty communicating, was hostile, seemed to be lying, and so forth (Babbie, 1995).

The researcher went to the field fully aware of the dangers of fieldwork. As the researcher developed theoretical understanding of what the researcher was observing, there was a constant risk that the researcher would observe only those things that supported the researcher's theoretical conclusions. This danger may be partially avoided, amongst other things, by intersubjectivity. The researcher might enlist the assistance of others as the researcher begins to refine her/his theoretical conclusions. Or the researcher, being aware of the problem may be able to avoid it (Babbie, 1995). In this study, the researcher was able to avoid the problem because the researcher was constantly on guard of her status in the Department of Education as shown in the section on reflexivity.

Cited by de Vos et al., Morse (1991) mentions establishing rapport as one of the challenges that face a fieldwork researcher. The researcher must establish rapport in order to gain information from participants. The researcher must also cope with the unanticipated problems and rewards of interviewing in the field. Recording and managing large volumes of data generated even by relatively brief interviews can constitute a challenge. The researcher must be prepared for all these challenges in the field including that the participant must do ninety percent of the talking (Ibid).

### **3.7.2 The semi-structured one-on- one interview**

The researcher engaged semi-structured interviews in order for the researcher to organize the question around the experiences of the DSG when implementing the IQMS. Semi-structured interviews are defined as those organized around areas of particular interest, while still allowing

considerably flexibility in scope and depth. Field and Morse (1995), according to de Vos et al. (2005) refer to open-ended or guided interviews.

Semi-structured interviews were used by the researcher in order to gain a detailed picture of the participants' beliefs about perceptions or accounts of the experiences of the DSG when implementing the IQMS. This method gave the researcher and participants much more flexibility. The researcher was able to follow up particular interesting avenues that emerged in the interview. The participants on the other hand were able to give a fuller picture of what they were saying. Semi-structured interviews were found especially suitable because the researcher was interested in a phenomenon she believed was complex or controversial or personal (de Vos, 2005).

The researcher had a set of predetermined questions on an interview schedule (See Appendix 4). Questions were nearly open-ended. The interview was guided by the schedule rather than dictated by it. The participants shared more closely in the direction the interview took. The participant could introduce an issue the researcher had not thought of. In this relationship, the participant was perceived as the expert on the subject. The participants were allowed an opportunity to tell their stories (de Vos et al., 2005). The researcher took heed of the warning: "Don't use the interview to show off your knowledge, vocabulary, charm, or other abilities. Good interviewers do not shine; only their interviews do" (de Vos et al., 2005:289).

The researcher tried her best to guard against these warnings during interviews. An effort was made to make the participants feel comfortable and at ease. As such the participants were not restricted to respond in English because the questions were written in English on the interview schedule. The researcher facilitated and guided the participants instead of dictating the encounter. As the constructor of the interview schedule, the researcher has studied the schedule in advance. This helped the researcher during the interview to concentrate on what the participants were saying and also to monitor the coverage of the scheduled topic (Smit et al., 1995).

The researcher gave the interview schedule to the participant in order for the participant and the researcher to read it together. According to Smit et al. (1995), the researcher could also hand the

interview schedule to the participant and they could read it together. The participant then could choose which particular question he wished to answer at specific stages. The participants thus were allowed a strong role in determining proceedings in the interviews. Not every question had to be asked because other questions were answered during follow up questions. The interview was allowed to move away from the questions on the schedule. The interviewing sessions were not confined to asking questions and recording answers. They relied on mutual attentiveness, monitoring and responsiveness like any other instance of ordinary conversation. But it was the researcher who decided how much deviation was acceptable as she was guiding the interview (Sacks et al. in de Vos, 2002).

### **3.7.3 The interview setting**

Producing a schedule beforehand forced the researcher to think explicitly about what, in the researcher's mind, the interview would cover. It forced the researcher to think of difficulties that would be encountered, for example in terms of wording or sensitive areas (de Vos et al., 2005).

Having determined the overall issue to be tackled in the interview, the researcher applied her mind on the broad range of themes and questions and areas to be covered in the interview. These were arranged into the most appropriate sequence. For instance, the first question was meant to be an introductory question. It served the purpose because a theme of 'recruitment and selection of the DSG' emerged from this first question. The question about the training received by the DSG to implement the IQMS followed. The sequence of the questions was easily sorted out with themes emerging prominently to build the narrative. The researcher arranged the questions in the most logical order to address. The questions were arranged from simple to complex and from broad to more specific. The first question was simple in the sense that it just wanted to know when one assumed duties as DSG. The researcher thought it would be a good idea to leave sensitive topics till later in the interview. For instance, a question about training on dispute resolution procedures in the IQMS was left until later (de Vos, et. al, 2005). The researcher was aware that this question might have been sensitive. As a result, it was from this question that the theme of management of educator development and accountability emerged.

The interviews assisted the researcher to observe as well. For example, the researcher could note the participant's face if anything was considered too delicate a question to ask. Similar observations were made regarding the quality of the dwelling, the presence of various possessions, the participant's ability to speak English, the participant's general reactions to the study, and so forth (Babbie, 1995). For example, in one of the schools the interviews were conducted in the researcher's vehicle because there was no room that could be spared for the interviews. The principal and the staff were sharing a room. This room had a stove and pots. All the indications were that the room was also used as kitchen to cook food for the learners – looking at the sizes of the pots.

The researcher humbled herself, accepted the situation and conducted the interviews in the car. Fortunately, the interviews were tape-recorded and there was no need to write anything down. The researcher's presence did not affect a respondent's perception of a question or the answer given. The researcher was a neutral medium through which questions and answers were transmitted. If this goal was successfully accomplished, different interviewers would obtain exactly the same responses from a given respondent (Babbie, 1995). The researcher in this study was a teacher, and therefore knew how she was expected to dress in order to be accepted.

The researcher dressed in a fashion similar to that of the people he/she was interviewing. A richly dressed researcher would probably have difficulty getting good cooperation and responses from poorer respondents. And a poorly dressed interviewer would have similar difficulties with richer respondents. Dress and grooming are typically regarded as signals to a person's attitudes and orientations. At the time of writing this, wearing torn jeans, green hair, and razor-blade earrings may communicate – correctly or incorrectly - that you are politically radical, sexually permissive, favourable to drug use, and so forth (Babbie, 1995).

In demeanour, interviews should be pleasant if nothing else. Because they will be prying into the respondent's personal life and attitudes, they must communicate a genuine interest in order to know the respondent without appearing a spy. They must be relaxed and friendly without being too casual or clingy. Good interviewers also have the ability to determine very quickly the kind of person the respondent would be comfortable with and the kind of person the respondent would enjoy talking to. Clearly, the interview would be more successful if the interviewer can become

the kind of person the respondent is comfortable with. Second, since the respondents are asked to volunteer a portion of their time and to divulge personal information about them, they deserve the most enjoyable experience the researcher and interviewer can provide (Babbie, 1995).

A good model for interviewers is the actor reading lines in a play or motion picture. The lines must be read as naturally as though they constituted a natural conversation, but that conversation must flow exactly according to the language set down in the questionnaire (Babbie, 1995).

By the same token, the interviewer must be familiar with the specifications prepared in conjunction with the questionnaire. Inevitably some questions will not exactly fit a given respondent's situation, and the interviewer must determine how the question should be interpreted in that situation (Babbie, 1995). The specifications provided to the interviewer should give adequate guidance in such cases, but the interviewer must know the organization and contents of the specifications well enough to refer to them efficiently (Ibid).

In order for the researcher to have the exact record of the answers, the responses were tape-recorded. Babbie (1995) had noted that whenever the questionnaire contains open-ended questions it is very important that the interviewer record the answer exactly as it is given. No attempt should be made to summarize, paraphrase or correct grammar (Ibid).

This exactness is especially important because the interviewer will not know how the responses are to be coded before processing. Indeed, the researchers may not know the coding until they have read a hundred or so responses. For example the questionnaire might ask respondents how they feel about the traffic situation in their community. One respondent might answer that there are too many cars on the roads and that something should be done to limit their numbers. Another might say that more roads are needed. If the interviewer recorded these two responses with the same summary – “congested traffic” – the researchers would not be able to take advantage of the important differences in the original responses. (Babbie, 1995). Sometimes the respondent may be so inarticulate that the verbal response is too ambiguous to permit interpretation. However, the interviewer may be able to understand the intent of the response through the respondent's gestures or tone. In such a situation, the exact verbal response should

be recorded, but the interviewer should add marginal comments giving both the interpretation and the reasons for arriving at it (Ibid).

More generally, researchers can use any marginal comments explaining aspects of the response not conveyed in verbal recording, such as the respondent's apparent uncertainty in answering, anger, embarrassment, and so forth. In each case, however, the exact verbal response should also be recorded (Babbie, 1995). One of the key strengths of field research is the comprehensiveness of perspective it gives the researcher. By going directly to the phenomenon under study the researcher can develop a deeper understanding of it. The field researcher may recognize several nuances of attitude and behaviour that might escape researchers using other methods

Interviews are naturally open-ended and so using open-ended questions allow participants to respond from a variety of perspectives as de Vos (2002) has observed. The key open-ended question was: "What are your experiences as DSG in implementing the IQMS?" The researcher allowed the participants to exhaust the question asked as the research interview was a conversation between the interviewer and the interviewee (Cohen, Marion and Morrison, 2000).

The preliminary focus of this research was to gather data regarding challenges faced by the DSG when implementing the IQMS. As Babbie (2004) has observed, 'Being there' is a powerful technique for gaining insights into the nature of human affairs in all their rich complexity. The physical presence of the researcher in the settings increased the validity of the data collected. Maykut and Morehouse (2000) strengthen this view when they compare the different world views of the quantitative and qualitative researchers. They say that to reach their goals, quantitative researchers look to reliable and valid non-human instruments of data collection and statistical analysis, while qualitative researchers look to indwelling as posture and to the human-as-instrument for the collection and analysis of data. To Maykut and Morehouse (2000), it is the human instrument which is multifaceted enough and complex enough to capture the important elements of a person or activity.

Raw data was audio-taped from the interviews with permission obtained from the participants. Smit et al., (1995) mention that a tape recorder allows a much fuller record than notes taken during interview. It also means that the researcher can concentrate on how the interview is

proceeding and where to go next. Both electric and battery operated tape recorders were used to ensure data capturing. External microphones could be used for clarity. The tapes were later transcribed for close analysis. The participants were told that they had a right to ask for the tape after the interview. Holstein and Gubrium (1995) point out that when tape recording is not possible, detailed process notes of the interviews must be taken, which should be clarified and elaborated as soon as possible after completion the interviews.

The tapes were supplemented by field notes. Qualitative researchers discuss their practice of writing notes to themselves as an integral part of the research process (Maykut and Morehouse, 2000). These notes are referred to as a diary, a journal, or memos. The notes contain the researcher's personal record of insights, beginning understandings, working hunches, recurring words or phrases, ideas, questions, thoughts, concerns and decisions made during the research process. The qualitative researcher's field notes contain what has been seen and heard by the researcher without interpretation. A richly detailed journal becomes a useful part the data collection and analysis (Maykut and Morehouse, 2000). For this reason, the researcher in this study kept a journal.

Each step was recorded in the notes. What the researcher observed would also be in the field notes. Field and Morse (1995) in de Vos (2005) suggest that the researcher must always sit down immediately after an interview and jot down his/her impressions about the interview. Field and Morse refer to some critical points to follow when writing field notes to minimize loss of data. These include getting right to the task, not talking about the observation before it is recorded, finding a quiet place to write, setting aside adequate time to complete the notes, sequencing events in the order they occurred, and letting the events and conversation flow from the mind on to the paper. It may be useful to speak observations into the recorder. Field notes are a written account of the things the researcher had heard, seen, experienced and thought in the course of interviewing.

Field notes, according to de Vos (2005), should include both empirical observations and interpretations. But, observations and interpretations should be kept distinct. The researcher should write down her emotions, preconceptions, expectations and prejudices so that the researcher can develop these in the final product.

Davies (2007) observes that in qualitative research the range of data collection methods stretches from interviewing and observation to the use of artefacts, documents and records from the past, from visual and sensory data analysis to ethnographic methods. The various methods can be encompassed in case studies, multidimensional explorations, action research programs, group discussion clinical research or in pursuit of customer feedback (Ibid).

In each case there are issues to be tackled and skills to be taken into consideration in order to emerge with relevant and trustworthy data. For example interviews that are used as a method of collecting data in this study require certain skills. The aim was to emerge with feelings, ideas, described experiences, opinions, views, attitudes and perspectives. These have depth and breadth to them that extends beyond that which a structured questionnaire would deliver (Davies, 2007). The researcher understands that interviews are not superior to the structured questionnaire, but each method delivers different things. Survey methods using a random or representative sample enable the researcher to test ideas and arrive at conclusions that are based on evidence that the researcher can reasonably claim reflects the position of the population from which the sample is drawn. Interpretation is done through a perspective that the researcher has imposed upon it (Ibid).

The aim of this research was to arrive at conclusions that are specific to the DSG in the sampled schools. The conclusions reflect and explain the challenges facing the DSG in implementing the IQMS in Butterworth district. The aim was not to impose the researcher's perspective. As Davies (2007) points out, small sample interviewing enables the researcher to arrive at conclusions that are specific to the sample but which give a reflective and explanatory depth to the subject explored. Wojnar and Swanson (2007) share the same sentiment. They caution that the researcher must allow the data to emerge in qualitative studies. Doing phenomenology means capturing rich descriptions of phenomena and their settings.

The interview according to Denzin and Lincoln (1998) is the favourite methodological tool of the qualitative researcher. To them the interview is a conversation, the art of asking questions and listening. Interview is not a neutral tool. The interviewer creates the reality of the interview situation. In this situation answers are given. The interview produces situated understandings grounded in specific interactional episodes. This method is influenced by the personal

characteristics of the interviewer, including, race, class, ethnicity and gender. Muijen and Morehouse (2000) state that with a skilful interviewer the interview can be a superior data collecting device because the interviewer gains rapport with the participants. The interviewer may evaluate the sincerity of the participants. If the participants misinterpret the question, the interviewer may follow with a clarifying question, like, "Could you elaborate?" (Cohen et al., 2000) describe the interview as an opportunity for the participants to discuss their interpretations of the world they live in, and to express how they regard situations from their own vantage point. Cohen et al. (2000) defines the research interview as a conversation initiated by the interviewer for obtaining relevant research information. Verbal and non-verbal behaviour can be noted in face-to-face interviews.

The criticism that the one-on-one interview is one of the weakest methodologies because the participant is likely to provide the researcher with the official account is not really valid. In trying to find out about individual lives there is no better way than to ask the individuals themselves. Interviews are a useful way of getting data quickly and are an especially effective way of obtaining depth data. However, interviews also have limitations. They involve personal interaction, and cooperation is therefore essential. Participants may be unwilling to share. The researcher may ask questions that do not evoke the desired responses from the participants. Furthermore the responses could be misconstrued or even, at times untruthful (de Vos, 2002).

The researcher was well aware of these limitations. The researcher built a rapport with the participants during the pre-interview preparations. This prepared the ground for positive interaction and cooperation during the interview. The fact that participation was voluntary, cancelled the unwillingness to share. At the interview the general purpose of the research was repeated to encourage the participants to give their utmost cooperation.

Flick (2002) cites Kvale (1996:88) who details seven stages in the complete interviewing process: Thematizing: clarifying the purpose of the interviews and the concepts to be explored. Designing: laying out the process through which the researcher will accomplish his/her purpose. Interviewing: doing the actual interviews. Transcribing: creating a written text of the interviews. Analyzing: determining the meaning of gathered materials in relation to the purpose of the study.

Verifying: checking the reliability and validity of the materials. Reporting: telling others what you have learned.

### **3.8 DATA ANALYSIS METHODS**

Miles and Huberman (1994) define analysis as having three current flows of activity: data reduction, data display and conclusion drawing which stands for verification. In this study the researcher had to transfer tape recorded data on paper. The researcher had to listen to the tapes several times, hours of long hand-writing of voice recordings on the paper provided for each participant interviewed. Ultimately these were typed. Data was arranged according to themes that emerged, arranged and rearranged trying to get patterns and to figure out a sequence or flow of issues. Some scholars call this activity data reduction and data display, with the aim of concluding and verifying the report.

Data reduction according to Miles and Huberman (1994:10) refers to the process of selecting, focusing, simplifying, abstracting, and transforming the data that appear in written-up field notes or transcriptions. As they perceive it data reduction occurs continuously throughout the life of any qualitatively oriented project. Even before the data are actually collected, anticipatory data reduction is occurring. As the researcher decides which conceptual framework, which cases, which research questions, and which data collection approaches to choose, data reduction is taking place, “often without full awareness”. As data collection proceeds, further episodes of data reduction occur. When writing summaries, coding, teasing out themes, making clusters, making partitions, writing memos, data reduction is occurring. The data reduction process continues after fieldwork, until a final report is written (Ibid).

Miles and Huberman (1994: 10) maintain that data reduction is a form of analysis that sharpens sorts, focuses, discards, and organizes data in such a way that final conclusions can be drawn and verified. To them data reduction can be seen as “data condensation”. Miles and Huberman (1994) argue that data display is the second major flow of analysis activity. A display is an organized, compressed assembly of information that permits drawing conclusions and action. Looking at display helps people to understand what is happening and to do something – either analyze further or take action – based on that understanding.

The most frequent form of display for qualitative data in the past according to Miles and Huberman (1994) has been extended text. Text, in the form of field notes can be terribly cumbersome. It is dispersed sequential rather than simultaneous, poorly structured, and extremely bulky. Using only extended text a researcher may find it easy to jump to hasty, partial, unfounded conclusions. Better displays are a major avenue to valid qualitative analysis. The types of displays referred to here are graphs, charts and networks. All are designed to assemble organized information into an immediately accessible, compact form so that the analyst can see what is happening and either draw justified conclusions or move on to the next step of analysis, the display suggests may be useful. As with data reduction, the creation and use of displays is not separate from analysis, it is part of analysis. Designing a display – deciding on the rows and columns of matrix for qualitative data and deciding which data, in which form, should be entered in the cells – are analytic activities. In their own words, Miles and Huberman (1994) “advocate more systematic, powerful displays and urge a more inventive, self-conscious, iterative stance toward their generation and use”.

The third stream of analysis activity is conclusion drawing and verification. From the start of data collection, the qualitative analyst is beginning to decide what things mean. In other words is, noting regularities, patterns, explanations, possible configurations, causal flows, and propositions. Final, conclusions may not appear until data collection is over, even when the researcher claims to have been proceeding inductively (Miles and Huberman, 1994). Conclusions are also verified as the analysis proceeds. The meanings emerging from the data have to be tested for being able to be confirmed, that is their validity. Miles and Huberman have presented these three streams – data reduction, data display, and conclusion drawing/verification – as interwoven before, during, and after data collection in parallel form, to make up the general domain called ‘analysis.’ The three streams can also be represented as shown in Table 2 (Component of Data Analysis: Interactive Model). In this view, the three types of analysis activity and the activity of data collection itself form an interactive, cyclical process. The researcher steadily moves among these four nodes during data collection and then shuttles among reduction, display, and conclusion drawing/ verification for the remainder of the study (Miles and Huberman, 1994).

Gibbs (2002) notes that the first thing that characterizes qualitative analysis is that it analyses a distinctive form of data, namely language and texts. Even if the researcher is looking at images or observing social practices, these are usually transformed into linguistic form through descriptions and field notes. Language not only incorporates the terminology and vocabulary with which we understand the world. Language also is the medium by which we convey that meaning or interpretation to others. Language is also a tool we use to express our ideas and interpretations of the world. Language contains the concepts, categories and ontology's that describe and constitute the world in which we live. Some of these refer to the physical world we inhabit, but the more interesting ones from the qualitative researcher's perspective are those representing the experiences, social organizations, institutions, activities and practices that have been created in human culture and society (Ibid).

Gibbs (2002) also points out that there are two consequences of this focus on language. First, qualitative analysis tends to be based on an interpretive philosophy. Second, researchers tend to take a holistic view of what they are investigating. The interpretive view is that the people are constantly interpreting the world they live in. They are always trying to understand the world or imbue it with meaning. What the qualitative researcher is doing is trying to capture these acts of interpretation and to understand them. Some, such as the philosopher Peter Winch, suggest that what the researcher is doing is something akin to clarifying the conceptual frameworks the respondents are using - an activity he concludes is close to, if not identical with linguistic philosophy.

Qualitative data analysis is commonly iterative, recursive and dynamic. Researchers do not feel constrained to preserve analysis as a separate stage of work that follows data collection. Typically, qualitative data analysis is coincidental with data collection. It is not always distinct.

Once data collection and checking have been completed, the researcher should begin the process of analyzing the data. This analysis is conducted so that the researcher can detect consistent patterns within the data. Babbie (1995: 296) says, "as perhaps the most general guide, you look especially for similarities and dissimilarities" That just covers everything you are likely to see. On the one hand, you look for those patterns of interaction and events that are generally common to what you are studying – you look for norms of behaviour. "What behaviour patterns do all

participants share?" (Babbie, 1995: 296). For example, in this study: Do all participants do class observation before allocating scores to educators? Do all participants mentor and coach educators as required by the IQMS document? In this sense, according to Babbie (1995), the researcher is attuned to the discovery of universals. As the researcher first notices these, the researcher becomes more deliberate in observing whether they are truly universal in the situation the researcher is studying. If they are truly universal the researcher asks why that should be the case. What function do the universals serve? This explanation may suggest conditions under which universals would not appear. The researcher then may look around for those conditions in order to test her/his expectations.

Babbie (1995) notes as well that the researcher on the other hand is constantly alert to the differences. The researcher should be on the watch for deviation from the general norms the researcher might have noticed. Although most of the participants for example, may not be conducting class observation, there are those who may be doing this. The researcher must find out why they deviate from the normal practice. In what other ways are they different from other participants?

Babbie (1994) also notes that sometimes the researcher will find aspects of behaviour for which there is no identifiable norm. In such situations the researcher should create a classification of behaviour: an organized list of the variety of types. Having done that, the researcher seeks to discover other characteristics associated with those different types of behaviour. For example, which types of behaviour could be associated with which age group or gender? The purpose of the researcher is to discover general patterns.

Bless and Higson-Smith (2000) note that the process of data analysis takes many different forms depending upon the nature of the research question and research design, and the nature of the data itself. Qualitative data is analyzed with techniques especially designed for this form of data. In the process of data analysis statements that relate to the topic are constructed to form a composition that will have a logical conclusion (Creswell, 1998). As de Vos (2002) has noted, data analysis is a process of bringing order, structure and meaning to the mass of collected data.

Supporting de Vos (2002), Lee (1993) in Hardy and Bryman (2006) states that qualitative researchers typically generate large volumes of material producing in effect an assemblage of data. This data is usually derived from transcripts, field notes, documents, interviews and so on. Some scholars, including Marshall and Rossman (1999), Miles and Huberman (1994), Nachmias and Nachmias (1987) view this as an ongoing process of data collection because data collection and data analysis are intertwined in qualitative research (Hardy and Bryman, 2006).

Gibbs (2002) also agrees with this point. In qualitative research the researcher starts preliminary analysis during data collection or the field work stage. In order to emphasize the distinctiveness of qualitative analysis many writers on the subject avoid the term itself. Silverman (1993) prefers the term 'interpreting', Wolcott (1994) uses 'transforming' and Hammersley and Atkinson (1995) refer to 'making sense of' the data (Gibbs, 2002).

Qualitative data from field sources (like interviews which were used in this study) are usually rendered into a textual form by transcription (Hardy and Bryman, 2006). Fraenkel and Wallen, (2009; Leedy, 1997) confirm this point when they say that once data has been collected, the researcher will transcribe the data immediately, organizing and interpreting themes, the positive and the negative perceptions in relation to the research question.

Strauss and Corbin (1997) speak of axial coding, while Terre Blanche, Durheim, and Painter (2006) speak of elaboration. This means the researcher looks at the relationships and links. Events or remarks that were far away from one another are now brought close together (Terre Blanche, 2006). The researcher looks for patterns, and for relationships between textual bits, between codes, themes, categories and between codes and textual bits. The researcher looks at categories in terms of the conditions that gave rise to them, the context in which they raise, actions and interactions involved, and their consequences. The researcher looks for similarities and contrasts: cluster and partition textual bits. The researcher must look for contradictions as well. A participant may say something, and then say something quite different later on. Different participants may say different things about the same event.

In the process, the researcher must establish validity by ensuring that the categories established make sense. The researcher must make constant comparison each time the researcher finds an

instance of a category or theme. The researcher must compare it with previous instances. If it does not fit, either the researcher modifies the definition or creates a new category (Gray, 2004). Categories need to be tested repeatedly against data until no more changes to it are necessary.

It is also best to check performance against several different sources of evidence wherever possible to ensure that the assessment is as objective and accurate as possible. For example, to measure learner attendance it is better to carry out random physical handouts, to keep an independent list of absentees in each class and to fill in an attendance register. This could mean going back to the respondents to have them review drafts of the research reports. Researchers speak of triangulation (Gray, 2004).

Strauss and Corbin (1997) emphasize that the researcher should develop a story. This they call data integration. The researcher should merge data with her literature review to construct a coherent story which interprets the data in an integrated, cohesive manner – making sense of the data for the reader. Wojnar and Swanson (2007) cite scholars like Marshall and Rossman, 1999; Miles and Huberman, 1994; Nachmias and Nachmias, 1987) who view the exercise above as an ongoing process of data collection. The emphasis is on understanding the phenomena in context, viewing a person as a self-interpretive being. As pre-reflexive beings, researchers actively co-create interpretations of phenomenon. One needs to establish contextual criteria for trustworthiness of co-created interpretations.

In this study the researcher will take into consideration the steps as outlined and explained by Wojnar and Swanson (2007) for descriptive as well as for hermeneutic phenomenology. The steps outlined by Wojnar and Swanson as essential in the descriptive phenomenological method of inquiry, include bracketing, analyzing, intuiting, and describing.

Bracketing is an attempt by the researcher to achieve the state of transcendental subjectivity (neutrality) by putting aside prior understanding or preconceptions about the phenomenon under investigation. Bracketing may be accomplished by using field notes as a reflective diary to write down the researcher's observations, assumptions, and confusions. By seeking critique for the researcher's insights from the methodological experts (like the researcher's supervisor) or others

who might have personal or professional experience with topic under study (like teacher union members and EDOs (Education Development Officers)).

Rigorous analysis of data is the second component of the descriptive phenomenological investigation. There are seven steps that have been suggested: Reading and rereading descriptions to acquire general feeling for experience. Extracting significant statements to generate information pertaining to phenomenon studied. Formulating meanings to illuminate meanings hidden in various context of the phenomenon. Categorizing into clusters of themes and validating with the original text to identify experiences common to all participants, describing to generate a prototype of a theoretical model. Returning to the participants to validate the findings and incorporate any changes based on the participants' feedback to present a theoretical model that comprehensively reflects the universal features of phenomenon.

Describing is the end point of descriptive phenomenological investigation to present a theoretical model representing the essential structures of phenomena under study – a universal skeleton that can be filled with the story of each participant. Consistent with the Husserlian tradition, if the true structure of the phenomenon is identified, then anyone who has experienced the phenomenon should be able identify their own experience in the proposed description.

Wojnar and Swanson (2007) outline seven steps for the hermeneutic phenomenology as: Reading the interviews to obtain an overall understanding. Writing interpretive summaries and coding for emerging themes. Analyzing selected transcripts as a group to identify themes. Returning to the text or to the participants to clarify disagreements in interpretation and writing a composite analysis for each text. Comparing and contrasting texts to identify and describe shared practices and common meanings. Identify patterns that link themes and eliciting responses and suggestions on a final draft from the interpretive team and from others who are familiar with the context or the methods of the study.

Wojnar and Swanson (2007) cite Benner (1994) who summed up the steps involved in hermeneutic analysis as isolating paradigm cases, identifying repetitious themes for within and between cases and selecting exemplary quotes to illustrate themes. This is accomplished by reading each transcription as a case – some cases will immediately stand out as paradigmatic.

These cases can be used to draw the researcher's attention to various themes of the individual, experiences. Other cases may be of paradigmatic importance because of their similarities or deep contrasts. Each case is a source of themes.

Wojnar and Swanson (2007) state that the goal of hermeneutic inquiry is to identify the participants' meanings from the blend of the researcher's understanding of the phenomenon, participant-generated information, and data obtained from other relevant sources.

Wojnar and Swason (2007) suggests that the interpretive hermeneutic phenomenology is most useful as a framework for examining contextual features of a lived experience as generated from a blend of meanings and understandings articulated by the researcher and the participants. Those who tend to seek universals and ultimately aim to finding solutions may be more suited to a descriptive mindset.

The researcher will not have a research team. Analysis of data will be done solely by the researcher.

Interview data from tapes and field notes will be transcribed and field notes will be summarized highlighting positive and negatives using different ink colours. Interpretation of data will include description and explanation of structures and processes as given by participants in the themes that will have emerged during interviews. Jackson (2001) proposes comparative analysis when analyzing data, which will be done comparing similarities and differences which will assist in the discussion of the findings.

Babbie (2004) has also stressed that the key process in the analysis of qualitative data is coding – classifying or categorizing pieces of data – coupled with some kind of retrieval system. Referring to the same point, Denzin and Lincoln (1998) speak of data management. They say data management includes a coherent process of data collection, storage, and retrieval. These operations are aimed at ensuring a high-quality accessible data. Documentation of exactly which analyses was carried out and retention of data and associated analyses must be in place after the study has been completed.

Supporting Denzin and Lincoln (1998), Miles and Huberman (1984; 1994) define data analysis as containing three linked sub-processes: data reduction, data display, and conclusion. These processes occur before data collection, during study design and planning; during data collection as interim and early analysis is carried out; and after collection as final products are approached and completed.

Data reduction, according to Gray (2004), is reducing the sheer volume of data and making it more manageable and coherent. The researcher works with full raw transcripts, observation notes and store the data the researcher eliminates, to one side. Miles and Huberman (1984; 1994) also explain what takes place during data reduction. With data reduction, the potential universe of data is reduced in an anticipatory way as the researcher chooses a conceptual framework, research questions, cases, and instruments. Once actual field notes, interviews, tapes, or other data are available, data summaries, coding, finding themes, clustering, and writing stories are all instances of further data selection and condensation

Field notes will be edited, corrected and made more readable, even before they can be organized or indexed. Recorded interviews must be transformed into written text (transcribed), corrected and edited, also before being somehow indexed or entered into a text-based computer analysis program. Qualitative data needs to be reduced and transformed in order to make it more accessible, understandable, and to draw up various themes and patterns (Berg, 2001).

As Huberman and Miles (1994) have noted, a clear and working storage and retrieval system is critical if one expects to keep track of the reams of data that have been collected. This will provide easy access to data collected and will lead to systematic analysis and documentation of the data. In this way the study can, in principle, be verified through replication (Berg, 2001)

A well-organized data management system allows for rapid and effective movement back and forth chronologically and topically organized data. This in turn can improve the quality of ongoing data collection. An explicit data management regime enhances the transparency of research procedures which can vitiate concerns about veracity of research (Miles and Huberman, 1994) facilitate the secondary use of data, and open up qualitative analysis to audit, meta-

analysis, meta- evaluation and replication (Schwandt and Halpern, 1998), echoed by Berg (2001) above.

Open coding is the initial classification of labelling of concepts in qualitative data analysis according to Babbie (2004). Babbie (2004) quotes Strauss and Corbin (1990:62) who define open coding as follows:

*“Open coding is the part of analysis that pertains specifically to the naming and categorizing of phenomena through close examination of data. Without this first basic step, the rest of the analysis and communication that follows could not take place. During open coding the data are broken down into discrete parts, closely examined, compared for similarities and differences, and questions are asked about the phenomena as reflected in the data. Through this process, one’s assumptions about phenomena are questioned or explored, leading to new discoveries”.*

Babbie (2004) also refer to Strauss and Corbin (1997) who stress that open coding means to find concepts, categorize data and label phenomena. Strauss and Corbin (1997) further explain that this is an inductive process, allowing theory to emerge rather than being imposed on the data. This involves what Strauss and Corbin call disaggregation of data. This involves breaking up linear, chronological text into statements, sentences, small bits of text as instances of the themes, concepts and categories that have been identified. Research questions have to be kept in mind while doing this exercise. The researcher must try to keep the researcher’s mind open to possibilities and alternatives the researcher has not thought of. Data that seem to challenge the researcher’s assumption should not be ignored. These must be included to formulate concepts, categories or tentative hypothesis.

Responses from different categories can easily be compared. By so doing the reliability of the responses obtained from the different categories can be evaluated and compared to ensure that there is consistency in responses. The categories of schools are primary, junior secondary, and a high school. The researcher included all the categories in order to find out if the same

experiences are shared by participants from different categories or experiences differ according to categories.

The question that this research attempts to answer is how the DSG experiences the implementation of the IQMS and how it perceives the task of mentoring and coaching.

### **3.9 REFLEXIVITY**

The method of collecting data by interviews in the view of Fontana and Frey in Denzin and Lincoln (1994: 361) is influenced by the personal characteristics of the interviewer, including race, class, ethnicity and gender. Thus, according to them, the interview becomes both the tool and the object “an encounter in which both parties behave as though they are of equal status for this duration, whether or not this is actually so”. Supporting this view Valentine (2005) in Silevu (2007) warns that positionality and power relations may impact on the quality of information. The researcher attempts to position herself well by holding preliminary meetings with the participants. This gives the researcher time to explain the purpose of the research and the research ethics to the participants. Sharing the same language with the participants will be a great advantage because cultural background issues will be common. This means in this study the researcher must suspend her status as a departmental official and apply a notion of ‘bracketing’ (Leedy and Orsmond, 2005) as well as the notion of reflexivity (Wojnar and Swanson, 2002)

Maykut and Morehouse (2000) speak of the qualitative posture, which they call “indwelling”. A posture, to Maykut and Morehouse can be defined as a state or condition taken by one person at a given time especially in relation to other persons or things. A qualitative researcher assumes the posture of indwelling while engaging in qualitative research. To indwell in qualitative research means to exist as an interactive spirit, force or principle, and to exist within as an activating spirit, force or principle. It literally means to live between, and within. Perhaps this dictionary definition can be translated for qualitative research to mean being at one with the persons under investigation, walking a mile in the other person’s shoes, or understanding the person’s point of view from an empathic rather than a sympathetic position.

Maykut and Morehouse (2000) explain that this indwelling is also reflective. They further explain that to reflect is to pause and think; to process what has gone before. The qualitative researcher is a part of the investigation as a participant observer, an in-depth interviewer, or a leader of a focus group but also removes herself from the situation to rethink the meanings of the experience. Patton (1969:121) in support of the idea of indwelling has given this instruction:

*“Enter the world. Observe and wonder; experience and reflect. To understand a world you must become part of that world while at the same time remaining separate, a part of and apart from. Go then, and return to tell me what you see and hear, what you learn, and what you come to understand”.*

Preliminary meetings were held with the DSG and with the principal of each category of the schools. The meetings were held in each school on different days. Each school was told the name of the other school in which the research would be conducted so that it might not be easy for the participants to discuss the meetings and interviews with one another before the researcher visits the school. The researcher did not anticipate this kind of problem because the researcher intended using a tape recorder during the interviews. In cases where participants would be unwilling to be recorded, the researcher would then have resorted to the suggestions made by Patton (1990).

### **3.10 RELIABILITY**

The reliability of this study cannot be questioned because the researcher kept a journal and recorded each and every step all the way. From day one from each school, the conversation with the principals, with the participants and the observations, all these were documented in field notes.

Flick (2002) argues that researchers can go different ways in order to increase the reliability of data and interpretations. In ethnographic research, the quality of recording and documenting data becomes a central basis for assessing their reliability and that of succeeding interpretations. One starting point for examining this is the field notes in which researchers document their

observations. In order to increase the reliability of such data, a more or less general standardization of notes is suggested, especially if several observers are collecting the data. For increasing the reliability of field notes, Kirk and Miller (1986:57) in Flick (2002) suggest conventions for note taking, which are further developed by Silverman, 1993:147. These are shown in Table 3.1

**TABLE 3.1: Conventionalization of field notes**

<b>Sign</b>	<b>Convention</b>	<b>Use</b>
“ “	Double quotation marks	Verbatim quotes
‘ ‘	Single quotation marks	Paraphrase
( )	Parentheses	Field worker’s interpretation
< >	Angled brackets	Emic concepts of the member
/ /	Slash	Etic concepts of researcher
—	Solid line	Beginning or end of segment

**Source: adapted from Kirk and Miller 1986; Silverman 1993**

The underlying idea is that the conventionalization of notes increases the comparability of the perspectives which led to the corresponding data. In particular, the separation of concepts of the observed from those of the observers in the notes makes reinterpretation and assessment by different analysts possible. Transcription rules, which clarify procedures for transcribing conversations, have a similar function to notes conventionalized in such a way (Flick, 2002)

Silverman (1993) in Flick (2002) states that for interview data, reliability can be increased by interview training for the interviewers and by checking the interview guides or generative questions in test interviews or after the first interview. For observations, the requirement to train the observers before they enter the field and to regularly evaluate the observing can be added. In the interpretation of data, training and reflexive exchange about the interpretive procedures and about the methods of coding can increase the reliability.

In this study, there was no need to train the interviewers because only the researcher was engaged in interviewing.

The discussion about reliability in qualitative research comes down to the need for explication in two respects. First, the genesis of the data needs to be explicated in a way that makes it possible to check what is a statement of the subject on the one hand and the researcher's interpretation begins on the other. Second, procedures in the field or interview and with the text need to be made explicit in training and rechecking in order to improve the comparability of different interviewers' or observers' conduct. Finally, the reliability of the whole process will be increased by documenting it. Thus, the criterion of reliability is reformulated in the direction of checking the dependability of data and procedures, which can be grounded in the specificity of the various qualitative methods (Kirk and Miller in Flick, 2002).

### **3.11 VALIDITY**

The validity of this study cannot be unreliable because the researcher could see that the participants were honest when presenting their experiences during the interviews. Even their emotional state was such that they were speaking the truth. The question of validity can be summarized as a question whether the researcher sees what he or she sees (Kirk and Miller, 1986). Basically, three errors may occur: to see a relation, a principle etc. where they are not correct, to reject them when they are indeed correct, and to ask the wrong questions.

A basic problem in assessing the validity of qualitative research is how to specify the link between the relations that are studied and the versions of them provided by the researcher. In other words, what would these relations look like, if they were not an issue of empirical research at that moment? And: is the researcher's version grounded in the versions in the field, in the interviewee's biography etc., and hence in the issue?

This implies less that the assumption be made of a reality existing independently of social constructions, i.e. perceptions, interpretations and presentations, than that the question should be asked as to how far the researcher's specific constructions are empirically grounded in those of the members. In this context, Hammersley (1992:50-2) outlines a position of a 'subtle realism'.

This position starts from three premises. (1) The validity of knowledge cannot be assessed with certainty. Assumptions can only be judged for their plausibility and credibility. (2) Phenomena also exist independently of our claims concerning them. Our assumptions about them can only more or less approximate these phenomena. (3) Reality becomes accessible across the (different) perspectives on phenomena.

Flick (2002) states that research aims at presenting reality not reproducing it. If one starts from this position, the question of the validity of qualitative research turns into the question of how far the researcher's constructions are grounded in the constructions of those whom he or she studies, and how far this grounding is transparent for others. Thus the production of data becomes one starting point for judging their validity and presentation of phenomena and of the inferences drawn from them becomes another one.

One approach for specifying the validity of interviews according to Flick (2002) is to check formally if it was possible to guarantee the degree of authenticity which was aimed at during the interview. Flick (2002) also mentions suggestions for judging the validity of interview data that are made by Legewise (1987). According to this author, claims for validity made by a speaker in an interview have to be differentiated. This means to be judged separately in terms of the following: That, the contents of what is said is correct. That what is socially appropriate in its relational aspect, and that what is said is sincere in terms of the self-representation of the speaker (Flick, 2002).

### **3.12 ETHICAL ISSUES**

There are ethical issues that must be noted by the qualitative researcher.

Bless and Higson-Smith (2000) had explained that through data collection, the researcher comes in direct contact with other human beings. It is of prime importance that attention is drawn to some ethical considerations concerning the rights of the participants.

Huysamen (1994) expatiate on the rights of participants. Huysamen (1994) has observed that unlike the situation in the natural sciences, the object of study in the social sciences is, in the

final analysis humans themselves. It has to be acknowledged therefore that research participants do not owe anything to the researcher and that they are entitled to be treated with respect, dignity and courtesy. The fact that researchers often occupy positions of authority with regard to the participant e.g. lecturer against a student, does not bestow on them the inalienable right to summarily call up individuals to serve as research participants and to act condescendingly, inconsiderately and discourteously towards them. It is proper nowadays to the latter as participants and partners in research and to refer to them in this manner rather than call them subjects.

In this study, the researcher is a Departmental Official. The researcher observed all the research ethics, and did not impose her status over the participants. The researcher got a letter from the University of Fort Hare that introduced her to the participants (See Appendix 5). A letter asking for permission to conduct this research was written to the principals of the three sampled schools. In the interest of anonymity, the letter to the principals of schools is not shown here. A letter to the District Director asking for permission to conduct the research was written by the researcher (See Appendix 6). However, only a letter from the Provincial Department of Education granting permission has been attached (See Appendix 7). The letter granting permission from the District Director has been omitted as an appendix in the interest of anonymity.

Participants were requested to sign consent forms (See Appendix 8) to participate in the research after the purpose of the research was explained to them. Participants were assured of anonymity and confidentiality. Participants were informed that participation was voluntary and that they could withdraw their participation any time they wanted. Permission to record the interviews has been sought and was granted by the participants.

Although the questions were written and asked in English the researcher depended on the language in which each participant chose to respond to the questions. If the participant responded in isiXhosa, the researcher translated to English, the raw data captured for the benefit of those who do not understand isiXhosa. Data captured in isiXhosa is presented as it is, as direct quotes from the participants. The English translation of the researcher will be written in italics also as direct quotes from the participant, so that raw and translated data could be bracketed.

Although the questions were asked in English (See Appendix 4) most participants when responding, simply used code switching from isiXhosa to English or from English to isiXhosa. Observing that the participants were comfortable in responding this way, the researcher did not bother requesting them to respond in English, lest the information wanted, would not be fully given. Moreover letting the participants express themselves in the manner they wanted, contributed to making the scene more natural.

But this left the researcher with the responsibility of translating the Xhosa responses to English. There were a few difficulties which appeared during the translation process. Every language describes the world in different way and has its own grammar structure, grammar rules and syntax variance. The most frequent problems are: ambiguity, grammar, and language. Small words were also hard to translate, and the meaning of common words depended on the context, some words were untranslatable when one wished to remain in the same grammatical category.

The advantage of face to face interviews made it possible for the researcher to overcome most of the translation challenges. The fact that the researcher also came from the same cultural background as the participants, made it easier for the researcher to understand the context of most common words. The translated responses will be bracketed.

### **3.13 SUMMARY**

This chapter has discussed the methodology and methods used to conduct this study in order to discuss the research paradigm, research design, sample and sample procedures, data collection procedures, data analysis methods, reliability and validity, ethical consideration, conclusion, and chapter summary. The next chapter will present, analyze and interpret data.

## **CHAPTER 4**

### **PRESENTATION ANALYSIS AND INTERPRETATION**

#### **4.1 INTRODUCTION**

The previous chapter discussed methodology and methods used in this study. This study investigates the experiences of the DSG when implementing the IQMS in Butterworth district.

The aim of this chapter is to present, analyze and interpret data that emerged from the one on one interviews of this phenomenological study. The researcher uses literature reviewed in chapter two and relies mostly on the IQMS documents Resolution 8 of 2003 (the Resolution) otherwise known as the Collective Agreement (cf. Chapter 1.2) to support the analysis and interpretation of data.

In the first part of this chapter, the researcher introduces the sites and participants to the reader. The second part then moves further to present analyze and interpret the participants' experiences of the DSG when implementing IQMS in Butterworth district.

#### **4.2 CODING SITES**

There are three categories of the sites. Below a description of each is given as follows:

School life spans thirteen years or grades, from grade zero, otherwise known as grade R, a “reception year”, through to grade twelve or “matric” – the year of matriculation (Department of Education, 2010).

1. Primary School: For the purpose of this study, a school that admits learners from grade zero to grade six is a primary school.
2. Junior Secondary School: A school that admits learners from grade seven to grade nine is a junior secondary school.

3. Senior Secondary School: A school that admits learners from grade eight to grade ten is a senior secondary school.

The schools are coded as follows: PS (Primary School), JSS (Junior Secondary School). There were two senior secondary schools. These have been coded as SSS1 and SSS2

Participants have been given codes in order of the sequence they were interviewed from each school. Participants from the PS have been coded as PSP1, PSP2 and PSP3. Participants from the JSS had been coded as JSSP1, JSSP2 and JSSP3. Participants from SSS1 had been coded as SSS1P1, SSSP2 and SSSP3. Participants from SSS2 had been coded as SSS2P1 and SSS2P2.

### 4.3 CODING PARTICIPANTS

From three of the four sites, three participants were interviewed. From one site only two participants were interviewed, giving a total of eleven participants in the study. The following table shows the demographics of the participants per site who all are DSG.

**Table 4.1: Demographics of the participants per site**

Category of school	Gender and number	Additional portfolio
PS	3 Females	1 Principal 1 IQMS Coordinator 1 zero additional portfolio
JSS	3 Males	1 IQMS Coordinator 2 zero additional portfolio
SSS1	3 One male and two females	1 IQMS Coordinator 2 zero additional portfolio
SSS2	2 One male and one female	1 IQMS Coordinator 1 zero additional portfolio

Eleven participants were interviewed. Three females from the primary school, three males from the junior secondary, two females and one male from SSS1 and one female and one female from SSS2. This totals to six females and five males interviewed.

Factors such as age, gender and academic qualifications were not considered. The researcher felt that these parameters would not add any significant value to this study.

#### **4.4 DATA PRESENTATION ACCORDING TO EMERGING EXPERIENCES OF THE DSG**

Data is presented according to experiences that emerged during data analysis. Experiences that emerged were: Experiences on recruitment and selection procedures of the DSG; Experiences of the training received by the DSG to implement the IQMS; Experiences on the kind of support the DSG gets when implementing the IQMS; How the DSG experience knowledge in IQMS matters and terminology; Experiences by the DSG to manage tension between educator development and accountability.

The research question that guided the study is: How does the DSG experience the implementation of the IQMS in Butterworth district?

##### **4.4.1 Experiences on recruitment and selection procedures**

The theme of recruitment and selection emerged from the introductory part of the Interview Schedule (See Appendix1), when the participants were asked the number of years in the position of DSG.

There seems to be a variation in the manner in which the DSGs were recruited and selected. In sharing the experiences that they went through all the participants gave different versions on what selection and recruitment to the position of DSG involves in their schools. The following extracts are examples to show that the participants had a variety of the experiences on recruitment and selection procedures.

PSP1: ... kwisikolo ebendisuka kuso besingampraktizi u IQMS... xa ndifikayo apha bathi Mem siya kunyula ukuba ube yi DSG kuba lo mntu uthathe indawo yakhe ebeyi DSG kabani bani... *[in my previous school we were*

*not practicing IQMS... on arrival here they said madam we are electing you to be the DSG because you are replacing a person who has been as DGS for so and so (so and so is the name of a teacher to be supervised)]*

PSP2: ...kunyanzelekile ukuba ndibekhona kubo bonke ndiyi imidiyeyt siniya yabo... *[it is a matter of must that I must feature to all of them because I am their immediate senior]*

JSSP1: ...u IQMS uqale ngexesha ebekuqala i NCS kunzima kwabanye otitshala ukuyi andastenda ilesin plen. Ufumanise ukuba uyakwazi ukunceda ukuphripha ilesin plen kulo lening eriya...avele asuke ngoku umntu athi ubani uyi DSG yam. Sibe zi DSG ngolo hlobo. Ndide ndakhooptha nenye ititshala ukuba xa kukho imithing yale sekethe ndihambe naye...*[the start of IQMS coincided with the introduction of NCS (The National Curriculum Statement which was a new syllabus). It was difficult for other teachers to understand the preparation of a lesson plan. One finds that you can assist to prepare a lesson plan in that learning area... now a person just says so and so is my DSG. That is how we became to be DSG. I have even co-opted another teacher in order for him to accompany me when there is a meeting in this circuit]*

SSS1P1: ...we elect the DSG from the teaching staff... osuka kwi wekshop ye IQMS ufika enalo infomeyshini. Then you need a DSG, njalo njalo ... *[the one who has attended IQMS workshop comes back having that information... always like that]*

All the four extracts above show that there was variation in recruitment and selection of the participants to the position of DSG. For example, PSP1 and JSSP1 both shared their personal experiences on how they were selected as DSG. According to PSP1, as she joined the new school, she was nominated as DSG on her arrival. She claimed to have had no experience because there was no practice of IQMS from her previous school. She was not only selected as a DSG but she was presented with the incumbent she was meant to supervise. This selection procedure of her as a DSG was solely based on the fact that she was a replacement of a teacher who was a DSG.

On the other hand, JSSP1 claimed that he became DSG only because he understood how to prepare a lesson plan better than others when the NCS (the National Curriculum Statement, which was a new syllabus) was introduced. This response from the participant shows that there was no formal appointment for him to the DSG but got the position through informal assistance that he was offering to his peers on lesson preparation, he was then 'called' a DSG as he said that "*now a person just says so and so is my DSG*". By using 'now', it's an indication that he was even reluctant to accept responsibility as DSG. It became evident from this response that JSSP1 was not the only one who acquired the position of DSG in this manner when he said that "*that is how we became DSG*". His selection to the position of DSG was based only on his 'expertise' in lesson plan preparation. JSSP1 further reported that he selected another teacher in order for this teacher to accompany him when attending IQMS meetings in their circuit. This other teacher was

recruited and selected only by JSSP1 for the purpose of accompanying him when attending IQMS meetings. The 'co-opted' teacher is JSSP2 in this study.

SSS1P1 claimed that in his school they elected the DSG from the teaching staff as long as the person attended an IQMS workshop that person was regarded to be the DSG. On the other hand, PSP2 stated that *'it is a matter of must that I feature to all of them'*. From this response, one can deduce that the participant, even though she was a principal, she was not necessarily an expert in all the learning areas and all the phases. But by virtue of being a supervisor, she was expected to fill in the role of a DSG. She felt that even though she was not trained on IQMS, it was her duty as a principal to do so as she said that *"I am their immediate supervisor"*. It appeared that the participant was compelled by the position she was holding as principal as opposed to having been trained for the implementation of IQMS.

In all four cases mentioned above, it seemed as if the participants' experiences of recruitment and selection procedures were not based on their expertise in a particular learning area and phase. This understanding is prescribed in Resolution 8 of 2003 on how selection of the DSG should be done and that the educators must identify their DSG. This must include the educator's immediate senior and a peer selected by the educator on the basis of appropriate phase and learning area (cf. Chapter 1.3). For example, according to the Resolution the position of a principal in the implementation of IQMS is that of an accounting officer. This does not necessarily mean that the principal is an expert in all the learning areas, and therefore can be a DSG to all the teachers.

It has been noticed that inconsistency in recruitment and selection of DSG is apparently very high. These experiences were evident in the above extracts as articulated by JSSP1, JSSP2 and SSS1P1. PSP1 happened to be replacing a DSG, and was nominated as DSG, PSP2 is not an expert in all learning areas, but is compelled by her position as principal to 'feature to all of them', JSSP1 was regarded as an expert in lesson preparation, according to SSS1P1 anyone who has attended a workshop is regarded as part of the DSG. JSSP2 was nominated by JSSP1 as a companion when attending IQMS meetings, yet there is no such a provision in the Resolution (cf. Chapter 1.3).

It was evident from the participant's responses in all the categories that the recruitment and selection of the DSG was apparently inconsistent in schools. There were different experiences for each DSG and each school. The schools seemed not have taken cognizance of the Resolution either because they did not know what was the right thing to do, or they chose the DSG in accordance with their circumstances in the school. The recruitment process is the first step towards creating the competitive strength and strategic advantage for the organization (cf. Chapter 2.8), and so this process needs to be systematic, but responses from the participants prove it to be unsystematic and inconsistent.

The next sub-section looks at the responses of the participants with regard to their experiences in training as DSG to implement the IQMS.

#### **4.4.2 Experiences on the training received by the DSG when implementing the IQMS**

The following extracts are the responses from the participants sharing experiences with regard to training for the implementation of the IQMS. From these experiences, the DSG confirmed that there was apparently no training given to them to implement the IQMS. The following extracts are examples of testimony to this apparent lack of training:

PSP1: ...andikhange ndiye kwitreyning, andikhange ndiye kwitreyning, andifuni kuxoka... *[I did not go to the training; I did not go to the training. I do not want to lie.]*

PSP2: ...kuphela saxelelwa sibizwe emithingini, akukabikho treyning ...tu tu... *[We were only told in a meeting. There is no training yet..., not at all, not at all]*

JSSP1: ... I can say we do not have the proper training. Siyawenza lo msebenzi lo ube uqonda ukuba awunanto unokuma ngayo.Yona, yona itreyning iyafuneka xa uzakuba ngu DSG engakumbi xa ufikelela kule nto yoku evalyuweytha ... *[We do this work but deep down you know you have nothing to lean on. Truly, there is dire need for training for one to be the DSG, more especially when it comes to the issue of evaluating]*

JSSP3: ...zange ndifumane treyning – nowu zange ndiyifumane... *[I never received any training – no I never received it]*

SSS1P1: ... I never received any training...*[There is Ma X, our IQMS Coordinator, who is very clear about IQMS. She often calls us and workshops us]*

SSS1P2:...ndazi infomal treyning ukuba iIQMS yinto yokudivelophana izinto okufuneka uzenze apha esikolweni... umntu oyaziyo le nto apha esikolweni ngu Ma X.... *[I know informal training that IQMS is something to develop each other in things that you must do here in school... the person who knows this thing here at school is Ma X]*

SSS1P3: ...apha ndatreynwa ukwenza iklas visits... andikho kliye kuba andinakuthi ndi wan handred pesent sho abhawuthi ukuyenza le nto...sins nam ndingawubambi kakuhle umcimbi... [*Here I was trained how to do class visits...I am not clear because I cannot say I am one hundred percent sure about doing this thing...since even myself I do not really grasp the matter*]

All the participants confirmed that that they had not experienced training on the implementation of the IQMS. This was evident in PSP1's response in saying that "*I did not go to the training*". To add to this, PSP2 used "*not at all, not at all*" as an emphasis and a pledge that she did not receive any training for implementing the IQMS. Both SSS1P1 and SSS1P2 were confident that the only form of training they had received was from a colleague called Ma X who was regarded as IQMS expert in her school. SSS1P3 was Ma X referred to by SSS1P1 and SSS1P2 as an expert in the IQMS in their school. They both used the word 'clear' to make their point that SSS1P3 was an expert in the IQMS. Interestingly, whilst the two colleagues perceived Ma X as an expert in the implementation of the IQMS, she denied this position of being an expert. Instead she claimed not to be clear and that she lacked knowledge of the subjects as she said that "*... I have not even grasped the matter...*" To add to this, quandary she claimed that her training was only for class visits not the implementation of the IQMS.

Not only were participants feeling lack of confidence because of the lack of training but they also admitted the experience of insecurity as JSSP1 said that "*...we do this work but deep down you know that you have nothing to lean on...*". This expression showed that the participant understood that the lack of training did not only affect the way they implemented the IQMS but it was also something that haunted their conscience resulting in the experience of insecurity. This experience of insecurity was seen to have had a potential to affect the way one evaluated his / her colleagues. From the above, we learnt that the participants' experiences of training for the implementation of the IQMS was next to nothing. The lack of training resulted in participants having experiences of insecurity and doubts about their performance of their duties to implement the IQMS. There was also evidence that even in cases where people had been identified as experts they were not confident of their ability to implement the IQMS. These experiences were contradictory to the expectation that the implementation of the IQMS should have started by the training of the National Training Team (NTT) which trained the Provincial Training Team (PTT) which in turn would train three educators per school (cf. Chapter 2.5). The experiences of the participants were suggestive that the training was never done at the school level. Literature

suggests that training is key to issues of quality management (Embree, 1991). If DSGs are not equipped to deliver quality service in the implementation of the IQMS as an appraisal and evaluation tool, then how does the IQMS add value to the professional development of the supervisee? Hence the participants had experienced ambivalence in their position of having to do the work even though they experienced lack of confidence and insecurity. Ambivalence is due to the lack of confidence and at the same time the sense of feeling responsible and accountable for the job as part of the requirements of their office as DSG.

The following section presents the experiences of the participants in terms of support from senior managers when implementing the IQMS.

#### **4.4.3 Experiences on the kind of support for the DSG when implementing the IQMS**

The following extracts are experiences of support afforded to DSGs when implementing the IQMS.

JSSP1: ...uyabona, isapoth, isapoth, isapoth, asikho kwi Department. Ndisitsho nje besikhe sa athenda iwekshop. Siyi athenda nini lo wekshop? Ngo Agasti, ngo Septemba yi Sumetiv..." *[You see the support, the support, the support there is no support from the Department of Education (Eastern Cape). Even though I say this we had just attended a workshop. When do we attend that workshop? In August, in September it is Summative Evaluation]*

JSSP2S: ...the only support that we get from the Department is just guidance how to implement IQMS.

JSSP3: ...do you call that support when a person tells you that this (IQMS) must be done?

SSS2P1: ...andilufumani, nyaka nonyaka ndalucela ndaluncama. Noprinspal ngokunjalo, naye akulufumani ngaphandle. Naye simxelele ukuba siyalufuna uncedo... Nakwi SIP yethu abakafiki nanamhlanje... Nowakwa nashinal umntu ufike kabini apha ndayibhalisa kuye le nkxalabo ndamxelela ukuba niyasibetha ngolu hlobo...asifumani luncedo...uyabona ayisincedis akukho mntu usincedisayo. Ufumanise ukuba yinto nje obonayo ukuba ngumdlalo... *[I do not get assistance, year in, year out, I have given up now. It is the same with the principal he also does not get assistance from external stakeholders (Departments of Education). We have also told him that we need assistance...Even with our SIP, (School Improvement Plan), up to this day, they have not come. An official from the National Department of Education has visited us twice. I registered this concern to the official, that you are making us suffer in this way... truly it (IQMS) does not assist us.. All in all there is no assistance. One finds that this (IQMS) is something that one sees to be just a game]*

SSS1P2 : ... akukho sapothi...bebekhe beza aph' esikolweni basixelela, ititshala zonke, nothi i DSG. Isapothi sabo sasingekho kliye... *[There is no support (from the District Office)... they once came here to the school and told us as teachers, and not as DSG. Their support was not clear]*

All five participants claimed to have had experienced lack of support from all the levels of their supervisors: the Principal, District Office, the Provincial and National Departments of Education.

One of the participants testified that the visit by the district officials was a general visit to the whole school. She claimed that whilst the officer was addressing IQMS implementation matters, this had no direct support to the DSG. The visit was rather experienced by the participants as a ‘telling’ exercise as opposed to listening to the challenges and experiences of DSG in implementation of the IQMS. To illustrate this SSS2P2 said that “...*told us as teachers, and not as DSG*”. This experience of being told was also shared by JSSP3 who said that “*do you call that support when the person tells you?*”. This had connotation that the DSG had experiences of being bossed as opposed to being supported by the seniors. On the other hand, JSSP1 reported that his experience with the district officials was at the workshop that he was invited to. He seemed to criticize the timing of the workshop as he complained that it took place at the time he was supposed to be submitting summative evaluation scores. This can be seen as superficial exercise that prepares DSG for submission of evaluation scores as opposed to capacity building and professional development.

SSS2P1 expressed a feeling of hopelessness due to lack of support as he said that “*I have given up*”. He shared his attempts for years to engage and express the need of support but all in vain. Even when the participants had experienced support from the District Officials, the support was at the level of guidance. JSSP2, who happened to be the only participant to experience support from the district officials, expressed discontent when he said that “*this was just guidance*”. The use of ‘just’ showed that the participant expected more than guidance on how to implement IQMS.

#### **4.4.4 Experiences of lack of knowledge about the IQMS**

In this section, the participants were vocal about their experiences of having to implement the IQMS when they were uncertain themselves about IQMS and its vocabulary. This section, to a very large extent, highlights the negative effects into the lack of training as well as inadequate training of the DSG in implementation of the IQMS. The following extracts demonstrate this quandary:

PSP3: ...*nawe wena DSG akuyazi nerhayithi nerongo...unikwa nje ezi zinto end nowu wan meykhs ey folowu aph. Nalo IQMS sifilisha nje ezi foms sizihambise...[Even you as DSG you do not know what is right or wrong...you are just given these things, and no one makes a follow-up. Even this IQMS we just fill in these forms and submit]*

SSS1P1: ...I need to know what IQMS is all about. I need to be aware. I still remember that there are forms, but we need training. Even the very IQMS terminology like PGP, DSG I cannot explain...Kuba ndisithi andinalwazi... ngaske ndibe nolwazi...[*Because I say I have no knowledge... How I wish I could have knowledge*]

From the above extracts, the experiences of the participants were indicative of the lack of knowledge and understanding on the implementation of the IQMS. Not only were the participants not well vested in IQMS matters but there were also experiences of desperation from the lack of knowledge. For example, PSP3 made a claim that “*you do not know what is right or wrong*”. There is a sense of being confused as well as the desire to know and understand the IQMS as expressed by both SSS1P1 and PSP3.

The following phrases from SSS1P1 demonstrated this lack of knowledge of IQMS matters and terminology: ‘*Because I say I have no knowledge*’, ‘*How I wish I could have knowledge*’, ‘*I need to know what IQMS is all about*’, ‘*Even the very IQMS terminology like PGP, DSG, I cannot explain*’.

SSS2P1’s response that “*I told them we knew nothing*” is also manifestation of lack of knowledge of IQMS matters and terminology. According to the participant, the Departmental official asked them how they were ‘doing’ IQMS. The use of the verb ‘do’ (which was eminent in the response of PSP2) by the Departmental Official showed where the use of this verb emanates. The study was investigating the experiences of the DSG when ‘implementing’ the IQMS. But in a number of instances the word ‘implement’ has been found to be substituted with another word. PSP1, for instance, said that ‘*in my previous school we were not ‘practizing’* (instead of implementing) the IQMS.

From the above extracts, there was evidence that the DSG experienced an apparent lack of knowledge of IQMS matters and terminology by the participants. To them, the training on implementation was reduced to an exercise of filling in the evaluation forms.

The DSG is defined in this study as a group who are experts in an area of operation, a mentors and a coaches who have been identified by the individual educator, and therefore cannot lack knowledge and be found wanting as is the case with the participants in this study (CF. Chapter 1.8. But this seems not to be the case with all the above participants who all seem all to be lacking knowledge of IQMS matters and terminology. It is not clear how the Departmental

Officials who are supposed to be capacitating the principals and the DSG use terminology like 'do IQMS' when supposed to be inquiring about the implementation of thereof.

The following section is the experiences of tension between the roles that the office of the DSG upholds.

#### **4.4.5 Experiences of tension between the roles of being an educator developer and accountability officer**

In this section the participants made claims of experiences of tension between the position of educator developer and 'accounting' officer as an official responsible to the employer that was meant to evaluate performance of the educators.

SSS2P1: ...bhifo that sasiye sizipheke izkoz, sisenzela i inkhrint. Wiwe onest thu them bhikhoz sabaxelela ukuba siyapheka qha...ukupheka kukuthi nidibane ubuze ukuba wena ufilisha ukuba ndingakunika bani, ukwenzela ukuba ufumane lo pesent. .. ufumanise ukuba uthi umntu nalapho a wikh khona azinike isko esiphezulu into leyo eza kumbetha kwi asistens... *[Before that we just 'cooked' the scores for the increment. We were honest to them because we told them that we only 'cook'... cooking is to come together and ask what score do you feel I must give you... so that you can get that percent. Then you find that the person scores himself high even in areas where he is weak something that counts against him when needing assistance]*

PSP3: ...ukuba umntu uzinike i sko esiphezulu andinakho ukusithoba kuba ndiyazi ukuba uza kuma nam epalini. Ngaphandle kokungaqiniseki ngoba rayithi noba rongo, nawe awufuni ukunika i edyukeyitha isko esisezantsi kuba nawe uyamfuna u wan pesent. Une DSG yakho nawe. Unjalo u IQMS. Yonke into ethethwayo ku IQMS is jast thiyoriz, not praktikhal, from the distrikht ofis, naku lo nashinal ofis na kakade...*[If a person has given himself or herself a high score, I cannot lower the score because I know the person is going to confront me. Apart from being unsure whether you are right or wrong, you do not want to give an educator a low score because you also want that one percent]*

SSS1P3 ...the teachers are not clear about this thing... they have not yet grasped it... they are always defensive... as if you are a policeman

The experiences of being positioned between educator developer and 'accounting' officer seemed to have caused tension on how the DSG does its duties. SSS2P1 and PSP3 alluded to the fact that they were making up the scores as opposed to proper evaluation of the educator's performance. It appeared as if this was accompanied by unwillingness to be unpopular with their peers. In this regard, PSP3 used the word 'confront' to show the potential of levels of tension that might occur if you lower the score in areas where you knew the educator was weak. This experience had also a potential to defeat the very role that they had to play, in that if the educator gave himself/ herself a high score in the area of weakness this hindered the possibility of being trained in the area. On one hand, the incentive of one percent seemed to be the only drive for the

teachers to give themselves high scores. On the other hand, when they were not in agreement with the score awarded, as ‘accounting officials’, they were still not free to disagree. SSS1P3 made claims that whilst you, as an educator developer, could identify the gaps in knowledge, the label of being seen as a policeman brought about tension in the way she did her duties. From the above extracts, the participants were highlighting the tension that was embedded within the responsibility of being an educator developer and ‘accounting’ officer. As a developer, it was your responsibility to identify gaps in the knowledge of the learning area and therefore identify training needs. This role seemed to be overtaken by the desperation of the increment if one scores positive. This was not only a weakness of the educators’ side but also the DSG as they feared that being transparent about the weakness of their subordinates would also compromise their increment as well. It appeared that there was an open willingness on the side of the DSG to compromise their position as educator developer and do a superficial job of accounting for scores but compromise the quality of the scores. This suggested that the authenticity of summative scores submitted by schools to the district office should apparently be questioned. Also, under these circumstances, one should question the IQMS as an effective tool to evaluate educator’s performance in order to enhance quality learning and teaching. The major challenge that the DSG must manage is the tension between educator development and accountability. Apparently, both the educators and the DSG, viewed the evaluation process in the IQMS as a means of advancing their salaries by way of getting one percent pay progression after submitting summative evaluation scores (cf. Chapter 1.3).

The participants not only presented their experiences, they went further to identify advantages and disadvantages in the IQMS. The next sub-heading presents the experiences that were perceived as advantages and disadvantages in IQMS implementation. The following extract is a critique of the money incentive as the sole driver and motivation for the implementation of the IQMS.

*PSP3: ...if the Department did not attach money incentive in IQMS, IQMS would have been excellent...*

PSP3 above criticized the incentive attached to IQMS by the Department and suggests that IQMS without the money incentive would be a good program.

SSS2P1: ...I IQMS if yenziwa jenyuwin iyamnika utitshala ukuba azi develophe, la nto isusa la prayd... [*If IQMS is implemented genuinely, it gives the teacher an opportunity to develop him/herself...it removes that pride*]

Some saw the IQMS as an excellent program. PSP3 had an eye to see beyond the 'if' that on the whole, the implementation of the IQMS in schools was not just good, but it was 'excellent'. This showed that the IQMS had been accepted by the teachers and that they saw and appreciated the advantages brought in by it. The participant looked beyond the advantage of the money incentive. Moreover, the response was suggestive of the removal of the money incentive in the implementation of the IQMS. This testimony was evidence to this effect: "*...if the Department did not attach money incentive in IQMS, IQMS would have been excellent.*"

Others viewed the IQMS as a developer. IQMS implementation, according to SSS2P1, presented opportunities for the individual educator to develop professionally. In the words of SSS2P1 "*it gives the teacher an opportunity to develop himself/herself*". This response like the response from PSP3 had an 'if', and like PSP3 the participant had been able to see this advantage of the IQMS being a developer beyond the 'if'. The phrase 'if IQMS is implemented genuinely' was two pronged. It suggested that in the experiences of the participant, the IQMS was not implemented genuinely. On the other hand, it was a request or plea put forward that the IQMS should be implemented genuinely. This suggested that, for now, the opportunity for professional development was non-existent due to the implementation of the IQMS not being genuine. This left a challenge for the District Official to take this up in order to open the opportunities that were seen by the participant in IQMS implementation. The IQMS conquers pride. This was manifested in the words such as '*it removes that pride*'.

The experiences of JSSP3 in IQMS implementation made him to perceive the IQMS as promoting team work in the school. These words were a manifestation to such experiences: "*It encourages in terms of work as you ask each other questions.*" This was in line with what was alluded to by SSS2P1 that the IQMS '*removes...pride*'. In other words, IQMS implementation promoted good human relations in the school. The IQMS encouraged sportsmanship in the school because sport was prominently taken care of in the implementation of the IQMS and this was what the participant experienced when he spoke of '*extra-mural activities in which one is good like football*'. In this way, IQMS implementation encouraged teamwork from all angles.

The participant also perceived the IQMS as promoting accountability. This claim was illustrated in the following words: “...it is strong in the classroom situation, when you have to present in front of this person... it makes you to be scared of lagging behind”.

JSSP3: ...iwikhnes yayo njengoko ndibona mna, inezithembiso ezithile zokuba iza kuza nemali. Siphethe ngoku singayihoyi... ise ngathi oluhlobo ingena ngalo ayikho jenyuwin... ayina strakhtsha le nto makufonyishwe istrakhtsha esi indiphendent simonitharisha ukuba ziyenzeka na ezi zinto... [Its weakness, as I see it, is that it has some promises of bringing money...but at the end of the day you do not get those monies... as a result we end up not taking IQMS seriously ..... the manner in which it has taken off seems not genuine this thing has no structure, an independent structure to monitor if these things are being effected must be formed]

SSS2P1: ...apho ndingayithandi khona kukuba iDepartment yona ifuna isumetiv skoz ingazilandeli. ISIPs mazilandelwe. Ngoku i IQMS ayikho ifektiv kanti ukuba umntu ebethe unengxaki basibize nokuba kuphaya ekholejini ezo zikolo zineproblems ezinazo.... [Where I do not like it, it is when the Department wants scores and do not make a follow-up on those scores. Follow-up must be made on SIPs. Now IQMS is not effective, yet if the person had indicated that he/she has a problem they can summon us even there at the college (where Education Offices are located in Butterworth) those schools that have those problems that they have.]

According to the respondents, the question of ‘money’ constituted a challenge in IQMS implementation. The money in the IQMS undermined the initial objectives of the IQMS that would have been otherwise an ‘excellent’ program. This is illustrated in the words of PSP3: “...if the Department did not attach the money incentive in IQMS, IQMS would have been excellent, now with money incentive it is a mess”.

JSSP3’s response like PSP3’s was money-related. According to JSSP3, there were other monies (apart from the one percent pay progression) that were promised in the IQMS that were not forthcoming. This experience was illustrated in the following words: “...it has some promises of bringing money...But at the end of the day you do not get those monies.” This, according to JSSP3, left them not taking the IQMS seriously. To them, the IQMS was just something to divert the attention of the teachers not to fight for their rights in the form of demanding more money from the Department of Education. This resulted in them concluding that the IQMS was not introduced genuinely from the start. This was manifested in these words: “As a result we end up not taking IQMS seriously...it is just something to divert our minds so that we do not fight for our rights and ask for more money as the inflation so demands... the manner in which it has taken off seems not genuine”. These responses showed the depth of the danger ‘money’ had brought to the implementation of the IQMS. This was a challenge to those who had the authority to sort out these money-related challenges in the IQMS for the benefit of the implementation of

this program. JSSP3 further said that: *“this thing has no structure”* meaning the IQMS had no base.

Some experience neglect and lack of support in the sense that there was no follow-up by the District Officials even if they had identified the areas in need of development as required. This was illustrated in the words from SSS2P1: *“...the Department wants scores and do not make a follow up on those scores... if the person had indicated that he/she has a problem they can summon us even there at the college (where Education Offices are located in Butterworth) those schools that have those problems that they have”*. This showed eagerness on the part of the participant to be helped and to be supported by the District Officials.

Some experience discouragement even from their principals to implement the IQMS, as was evident in the response of SSS1P3 who said that: *“The weakness is the fact that your senior becomes the first person you see to be discouraging you...”* This, according to the participant, led to the implementation of the IQMS just to ‘please’ other people. This was illustrated in these phrases: *‘you are buying faces’* and *‘you just please people’s feelings’*. This showed how some participants experienced negativity in the implementation of the IQMS. It might not be easy for anyone to live and work under these conditions – to be discouraged by your senior who was supposed to be supporting you. These were the revelations of the seemingly nasty experiences of the DSG in schools.

The participants even further reflected on some solutions to improve on the perceived disadvantages. The following sub-heading presents the reflections by the participants to improve on the perceived disadvantages.

#### **4.4.6 Reflections by the DSG to improve on the negative experiences**

As the participants were sharing experiences in the implementation of the IQMS, they reflected and came up with ideas to improve on negative experiences. The following extracts are examples of suggestions from the reflections of the participants to improve the negative experiences. Training for the DSG was identified as one feature that could contribute to the decrease of the

negative experiences when implementing the IQMS. The following themes emerged as a testimony to that effect.

#### **4.4.6.1. Training for the DSG and teachers**

A number of participants have suggested training not only for members of the DSGs but for the teachers as well:

SSS2P1: ...ukuze i edyukeyshin yomntu omnyama iphucuke makudivelophwe ititshala...aba bantu bayambulala umntwana ngoluhlobo... [*In order for a black person to get quality education, the teacher must be developed...these people are killing the learner in this manner*]

PSP2: Propa treyning yayo, propa treyning yayo...hayi ukuba sibizwe sixelelwe. Otitshala nabo bango DSG ...mabatreynwe. It mast bhi prakhtikhal, siyeke ukube sithiyorayza. [*Its proper training, its proper training... not just being called and told. The teachers are also DSG...they must be trained. It must be practical we must stop theorizing*]

SSS1P1: ...we need to be work-shopped. We need to be work-shopped... yiyona ngaske siqale ngayo sizokwazi ukusuka. [*It is the one I wish we could start with in order for us to be able to move*]

SSS1P3: Nathi simelwe sixhotyiswe sicetyiswe kangangoko sicaciselwe kangangoko kwenzele kuqale wena as a DSG, uye une khonfidens nawe... [*Even us we need to be empowered be advised, and things be explained to us extensively, so that as DSG we can be confident*]

All the four participants above noticed the need for the training for one to assume duties as a member of the DSG. SSS2P1 took it further to the impact this lack of training had on the black learner in particular. He equated the lack of training for the DSG to murder when he claimed that ‘*these people are killing the learner...*’ The participant knew very well that the learner could not benefit if the IQMS failed to fulfil its objectives by not giving the implementers the necessary training.

PSP2 was being emphatic by saying: “*Its proper training, its proper training...*” The repeating of these words showed that the participant was desperate to get training in IQMS matters as a member of the DSG and principal. She perceived the Departmental Officials as theorists when coming to IQMS issues and called for a practical approach to the IQMS and a move away from the theory stance that she allegedly experienced. This was illustrated in the following words: “*It must be practical, we must stop theorizing.*” According to the participant Departmental Officials, have a tendency to ‘call’ and ‘tell’ and to her this ‘calling’ and ‘telling’ is not seen as training by the participant because she said that: “*...not just being called and told...*” The participant claimed

that teachers were also members of the DSG and therefore should also be trained as such. This was illustrated by this statement: *“The teachers are also DSG...they must be trained”*.

The response from SSS1P1 suggested that as things were then, without the training to implement the IQMS, they were stuck. He was so desperate for the training for them to make a start in implementing the IQMS. This was illustrated in the words: *“It is the one (the training) I wish we could start with in order for us to be able to move.”*

It was clear from the response of SSS1P3 that the DSG did not have confidence in itself as DSG. This was manifested in these words *“...things be explained to us extensively in order for us to get confidence as DSG”*. This showed that without the necessary training the DSG remained with no confidence to implement the IQMS. All the experiences from all the four participants, for the various reasons they put forward, showed that there was dire need for the training of the members of the DSG to implement the IQMS.

The following extracts bear testimony to the fact that monitoring and support by informed District Officials was identified as one of the factors that could contribute towards improving negative experiences when implementing the IQMS.

#### ***4.4.6.2 Monitoring and Support by informed District officials***

SSS1P3: ...ngaske i District Officials zibe kliye abhawut IQMS... nokuba zingezwa wans ngekota, engekqalisi. Ziphinde ziye naphaya kotitshala zitshintshe ithityhud, baphinde beze benze ifolowu-aph qho... ukuba nyhani njengokuba besicebisile nje ingaba iyenzeka kakuhle na. Bangezi bezojonga ukuba iyaqhuba na ufumanise ukuba yinto yangoku, eseyifunwa ngalo mzuzu...nabo beza sebe anda presha... *[How I wish district officials could be clear about IQMS...and at least come even once a quarter before IQMS starts. Again they must go to the teachers and change their attitude. They must come back again to make a follow-up and see if things are happening as per their advice. They must not come to see if IQMS is being implemented or not...and all this is rushed it is wanted now this minute...even themselves they come already under pressure]*

SSS2P2: ...before ku implimentwe enithing, it whud bhi bhetha ukuba otitshala babe involvd. Mhlawumbi wi mey reyz into enganceda kulo implimenteyshin. Kuhle ukuba uyazi bhifo what iz ekspekted of yu bhifo.... wonke umntu wayeyothuka into ka IQMS... *[Before implementing anything, it would be better to involve educators. May be we may raise something that would assist in that implementation. It is good to know what is expected of you prior... Everybody was taken by surprise by IQMS thing.]*

SSS2P1: ...mayisuswe le ndaba yemali, ungareyithwa unyuselwe ngenxa ka IQMS, kuba umntu akazukuveza iwikhnesiz zakhe. Lubekhona olunye uhlobo...aba bantu bayambulala umntwana ngolu hlobo...*[This money issue must be removed from IQMS. You must not be rated and promoted because of IQMS, because a person is not going to reveal his/her weaknesses. There must be another way... these people are killing the learner in this way]*

PSP3: ...ndingavuya ukuba IQMS nemali zingahlukaniswa, ititshala zifumane i anyuwal inkriment nje ngokuya kwakudala, ngomhla nenyanga ititshala yaqalisa ukusebenza... [*I can be glad if IQMS and money can be separated, then teachers get the annual increment like they used to in the past, on the date and month the teacher commenced duty*]

There seemed to be a suspicion from the participants that the District Officials themselves were not fully capacitated to implement the IQMS. This became evident even when the participants were doing their level best to be polite. For example, SSS1P3 when she said “*How I wish the district Officials could be clear about IQMS...*” This plea from this participant was an indication that the participant was deeply frustrated by the fact the very supervisor who was the District official seemed to lack knowledge and capacity in the implementation of the IQMS.

If the District Officials were seen by the participants as lacking capacity to implement the IQMS by way of monitoring and supporting them, it became logical for the District Officials to rather stay away from schools because they were going to be exposed. Obviously there was no effective monitoring and support that could take place if the District Officials were ‘not clear’ about the subject matter – the IQMS in this case. If they went to the schools they would be exposed and be subjected to embarrassment and their high status would be substituted with low esteem. They visited schools only to find out if the IQMS was being implemented. They wanted things then, not a later stage as illustrated in these words: “*They must not come to see if IQMS is being implemented or not...and all this is rushed it is wanted now this minute...*” The phrase ‘even themselves come already under pressure’ suggested that the District Officials visited schools only when they felt some pressure from the Provincial Office that demanded certain submissions. The District Officials should do the re-advocacy of the IQMS in order to change what the participant called ‘negative attitude’ of the teachers towards the IQMS. And whatever advice they gave, they should have followed-up. This is illustrated in the following words: “*...they must go to the teachers and change their attitude. They must come back again to make a follow-up and see if things are happening as per their advice.*” The participant has highlighted suggestions to improve on their negative experiences: monitoring and support by District Officials must be capacitated to implement the IQMS and re-advocacy of the IQMS by the District Officials to change the negative attitude of the teachers towards the DSG and the implementation of the IQMS as a whole.

The experience of SSS2P2 was that educators were not consulted or informed about the implementation of the IQMS. The IQMS was imposed on them to implement. This was manifested in these words: *“It is good to know what is expected of you prior... Everybody was taken by surprise by IQMS thing”*. The participant, therefore, was of the opinion that *“before implementing anything, it would be better to involve educators. Maybe we may raise something that would assist in that implementation”*. This suggested that even at this stage, the authorities thought of effecting any changes in the interest of improving on these negative experiences in IQMS implementation. Furthermore, there should be consultation of teachers who were implementers because the IQMS was implemented in schools and not in the boardrooms.

This suggested that if the Department thought of re-advocacy, the Department should take into consideration the suggestions made by the DSG, they are the ones who have the experience. Meanwhile, the experience of SSS2P1 showed that teachers were more interested in ‘money’ in the IQMS than professional development. This was illustrated by the following words: *“...you must not be rated and promoted because of IQMS, because people are not going to reveal their weaknesses.”* As a result, the participant suggested that as he experienced things on the ground, the Department of Education should find an alternative way that would be an incentive for the educators. This was illustrated in these words: *“there must be another way”*. According to the experiences of PSP3, this ‘another way’ of SSS2P3 must be *‘the annual increment like they used to get in the past, on the date and month the teacher commenced duty’*. All in all, the general feeling seemed to be the removal of money incentives from the IQMS and substituted with an alternative. The removal of the money incentive was manifested in these words from SSS1P2 and PSP3 respectively: *“This money issue must be removed from IQMS”* and *“I can be very glad if IQMS and money can be separated”*. SSS1P1 saw the people, who did not see that it was the money in the IQMS that was the root of all evils found in the IQMS, at the end of the day as robbing the learners of quality education. These were the people who had all the authority to change the situation. The people whom the participant perceived as the killers of quality education, and whom he referred to as *‘these people’* are the responsible authorities in the Department of Education.

These four participants seemingly had said it all. The Department of Education should invest resources in a more effective system of school support. District authority and capacity should be actively and urgently developed with innovative and effective strategies to assist the schools in developing their internal organizational and instructional capacity. If this was done, there would be a genuine school improvement process through school support and monitoring (cf. Chapter 2.7).

The participants suggested a number of ways that could contribute to improve their negative experiences when implementing the IQMS. These included re-advocacy of the IQMS in order to change the ‘negative’ attitude of educators towards the IQMS, effective training for the DSG and educators to implement the IQMS, effective monitoring and support of the DSG by informed district officials, removal of money incentives from IQMS implementation and formation of an independent structure to monitor IQMS implementation.

## **4.5 DISCUSSION**

This subsection interprets the themes that have been presented and analyzed above.

The themes that emerged were: Experiences on recruitment and selection; experiences on the training received by the DSG to implement the IQMS; experiences on the kind of support for the DSG when implementing the IQMS; experiences on knowledge of IQMS matters and terminology and experiences of the DSG to manage tension between educator development and accountability.

The discussion that follows is ‘**experiences on recruitment and selection**’

The recruitment process is the first step towards creating the competitive strength and the strategic advantage of the organizations. External recruitment makes it possible to draw upon a wider range of talent and provides an opportunity to bring in new experience and ideas into the organization (cf. Chapter 2.8). Selection consists of the process involved in choosing a suitable candidate to fill a post.

According to Resolution 8 of 2003, the individual educator identifies his/her own DSG after completion of baseline evaluation. This must include the educator's immediate senior and a peer educator selected by the educator on the basis of appropriate phase and learning area expertise. If there is no expert in the school for a particular learning area, the 'external recruitment' can be done. The DSG for that particular educator could be recruited by the educator from another school (cf. Chapter 2.3).

However, the experiences of the participants showed variations in recruitment and selection of the participants to the position of DSG. For example, PSP1 was told she was part of the DSG on arrival to a new school after a transfer. She became a member of the DSG because she was replacing a teacher who had been a member of the DSG. This showed no compliance with the Resolution. On the other hand, JSSP1 became part of the DSG solely because he was one of the people who understood drawing a lesson plan when the National Curriculum Statement was introduced. This manner too, did not show compliance with the Resolution. In the school of SSS1P1, as long as a person had attended an IQMS workshop (which usually was one-day workshop) that person became part of the DSG. PSP2 was a member of the DSG in her school by virtue of being a principal. She was their 'immediate supervisor' because she did not have a head of department and so she was expected to be part of the DSG. The fact that she was a principal did not necessarily make her an expert in all learning areas. Again, the manner in which PSP2 acquired the position of DSG, was not in compliance with the Resolution. The status of the principal in the implementation of the IQMS was that of an accounting officer.

It was evident that participants experienced a high rate of inconsistency in recruitment and selection of the DSG, all of which did not comply with the requirement prescribed for this purpose.

The next theme to be discussed is '**experiences on the training received by the DSG to implement the IQMS**'.

According to the Resolution, training must specifically address issues relating to how the IQMS should be implemented in schools. All officials and educators must have a thorough understanding of the principles, processes and procedures. Training must enable officials to plan

and administer the IQMS in a uniform and consistent manner. The NTT must clarify all the relevant issues and questions in the process of training. They must train the PTT which includes the officials from the District Offices. Training in schools should be led by District Officials ((Resolution 8 of 2003:7).

However, the experiences shared by the participants on the theme of ‘training received by the DSG to implement the IQMS’ showed a high rate of lack of training for the DSG. ‘Lack of training’ was an understatement because the participants virtually experienced no training as DSG to implement the IQMS. For example, PSP1 said: “*I did not go to the training*”, PSP2 said: “*there has been no training yet... not at all, not at all*”, JSSP3 said: “*I never received any training*”, SSS1P1 also said: “*I never received any training*”, SSS1P2 said: “*I know informal training...*”

The experiences by the participants that they were never trained as members of the DSG to implement the IQMS is thunderous and deafens the ear. The experiences were a direct contrast of the beauty of the training as reflected in the Resolution. The experiences showed that training never reached the participants. These experiences showed that the DSG could not be able to deliver quality services as evaluators, appraisers and mentors.

The next theme to be discussed is ‘**experiences on the kind of support for the DSG when implementing the IQMS**’.

The Resolution states that the National Department of Education has the responsibility of providing facilities and resources to support learning and teaching. It does not explain by what procedures the Department will be made accountable (cf. Chapter 2.5).

Support was defined as supplying the necessities and to give strength that would enable one to continue despite challenges. It is, therefore, imperative for the principal and the DSG to work hand in hand to ensure that the evaluation process takes place in the manner it is expected. The principal should share the responsibility with the SMT. with the aim to support the DSG. Bush et al. (1996) have noted that the main reason for the failure of quality initiative is the lack of senior management’s backing and commitment. Without leadership backing at all levels of the institution, the improvement process cannot be sustained.

Experiences of the participants showed that there was absolutely no support enjoyed by the DSG when implementing the IQMS in schools. For example, JSSP1 said that: *“There is no support from the Department of Education (Eastern Cape)”*. JSSP2 looked down upon the support they got as ‘just guidance’. JSSP3 asked a rhetoric question: *“Do you say that support when a person tells you this (IQMS) must be done?”* On the other hand, SSS1P2 said that: *“There is no support from the District Office”*. SSS2P1 said: *‘I do not get assistance, year in, year out, I have given up now.’* These experiences showed that the participants did not get support and that the participants were extremely frustrated by this condition. As Weber (2005) has pointed out there are no explanations in the Resolution about what will be provided, and how, and who will monitor and evaluate the efficacy of the development of human resources (cf. Chapter 2.5).

The next theme to be discussed is **‘experience on how the DSG experience knowledge of the IQMS and IQMS terminology’**.

Knowledge is defined as a body of organized information (cf. Chapter 1.1). The theme of the experiences on how the DSG experienced knowledge of IQMS matters and terminology emerged throughout the interviews as revealed by responses from participants and from various questions. The experiences showed a very high rate of lack of knowledge by the participants on IQMS matters and terminology. For example, PSP1 said: *“I do not know...”*, and PSP2 said: *“Support means to get those teachers who have done...and as they keep on doing, you keep on getting that this one and that one have done, it seems the one who has done better is this one”*. This experience showed that the participant does not have knowledge of what she was talking about, and moreover did not have knowledge of IQMS terminology to express herself. SSS1P1 said that: *“I need to know what IQMS is all about”*. SSS1P3 said: *“...the very teachers...are not clear...they have not yet exactly grasped it”*. SSS2P1 said: *“I explained to them that we knew nothing”*. These were the experiences of the participants seven years down the line after the commencement of the implementation of the IQMS. One wonders what and how these people were implementing the IQMS all these years. The picture painted in these experiences was rather gloomy.

The next theme to be discussed is **‘experiences of the DSG to manage tension between educator development and accountability’**.

The Resolution states that the main purpose of the DSG as appraiser and evaluator is to provide mentoring and support. Apparently educators view the evaluation process in the IQMS process only as a means of advancing their salaries by way of getting one percent pay progression after submitting summative evaluation scores. The major challenge that the DSG must manage therefore is the tension between educator development and accountability. By all means to be able to manage educator development and accountability, the DSG must have the appropriate skills. The DSG must have experienced training, the DSG must have experienced support, and the DSG must have the superior knowledge in IQMS matters and IQMS terminology. All these experiences are the ones that define the DSG as an expert in the area of operation. It is in experience of managing tension between educator development and accountability that the DSG must demonstrate skills such as coaching and be able to refer the educator to the objectives of the IQMS, be able to dwell at length on appraisal and evaluation issues through to professional development and WSE and ultimately to the attainment of quality learning and teaching and the ability to sustain it as lifelong learners (cf. Chapter 2.6 and cf. Chapter 2.7).

But the foregoing experiences that were discussed and the following experiences showed that the DSG was unable to manage tension between educator development and accountability. For example, JSSP1 said: *"...when it's time for IQMS... we sit at the table and look at each other and give each other scores"*. SSS2P1 said: *"...we just 'cooked' the scores for the increment...cooking is coming together and ask, what score do you feel I must give you..."* PSP3 said: *"If a person has given herself/himself a high score, I cannot lower the score because I know the person is going to stand with me on the pole (Meaning the person is going to confront me)*. The issue, in as far as the experience of this participant was concerned, was lack a of confidence which was due to lack of training and all the other negative experiences were also as a result of lack of training.

The experiences of the participants on the theme of tension between educator development and accountability showed that the DSG was unable to manage the tension between educator development and accountability, which was the last straw for the DSG who seemed not to be coping with the challenges faced as part of the appraisal and evaluation system in the Department of Education.

It transpired from the interviews conducted that the DSG when implementing the IQMS experienced the following: inconsistencies in recruitment and selection procedures of the DSG, lack of training to implement the IQMS, lack of support from the senior managers when implementing the IQMS, lack of knowledge of IQMS matters and IQMS terminology, inability to manage tension between educator development and accountability due to the ambivalence created by the money incentive and the dual role of the DSG as ‘educator developer’ and ‘accounting officer’.

#### **4.6 SUMMARY**

This chapter presented, analyzed and interpreted data according to themes that emerged. The chapter concluded that the root cause of all other challenges encountered by the DSG, is lack of training for the DSG to implement the IQMS, and lack of monitoring and support by Departmental officials.

The next chapter outlines the findings, draw conclusions and make recommendations. Guidelines that will hopefully assist both the DSG and the Departmental officials to improve in IQMS implementation will be given.

# **CHAPTER 5**

## **FINDINGS, CONCLUSIONS AND RECOMMENDATIONS**

### **5.1 INTRODUCTION**

The previous chapter presented, analyzed and interpreted data collected. The purpose of this chapter is to outline the findings, conclusions and recommendations. The literature reviewed in chapter two of this study was used to support the empirical work.

The purpose of this research was to investigate the experiences of the DSG in the implementation of the IQMS. In the previous chapter, experiences of the DSG were discussed according to the themes that emerged. This chapter outlines the findings.

The research question that guided this study is: What are the experiences of the DSG when implementing IQMS?

The participants shared that they had experienced a high rate of inconsistency with regard to recruitment and selection. All the participants came up with different versions of how each one of them acquired the position as a member of the DSG, yet in the IQMS processes and procedures, recruitment and selection is understood as outlined in Resolution 8 of 2003. For each educator, the DSG should consist of educator's immediate senior and one other educator (peer) selected by the educator on the basis of appropriate phase and learning area expertise. Shapiro (2010) argued that the recruitment process is the first step towards creating the competitive strength and the strategic advantage of the organization. This is suggestive that the experience of inconsistency in recruitment and selection, may rob the schools of this competitive and strategic advantage. In other words, recruitment and selection must be understood as a pace setter for an organization to deliver quality services in the sense that selection consists of the processes involved when choosing a suitable candidate to fill a post. Selection is followed by the training of the selected candidates in order for the organization to make sure that the selected candidates have the skills and attitudes to fulfil the objectives of the organization.

From the empirical work, the experiences of the DSG reflected lack of training, and inconsistent recruitment and selection processes which have resulted in psychological conditions, thus they lacked confidence to carry on with their duties. Recruitment and selection processes in an organization are a stage where the candidates are being prepared psychologically for the anticipated challenges of the job. This is the stage where the people who are going to do a job are instilled with confidence because, as Chapman (2010) argued that when people develop confidence, integrity, and develop emotionally, they automatically become pro-active, solution-focused, responsive, etc., which across the whole team has a cumulative effect. So many people at work are simply going through the motions, acting in a conforming state, often because they feel insecure; lack confidence to do what they think is right or is nervous about being bold. Whereas boldness is absolutely required for self-sufficiency, greater responsibilities, and all other behaviours the organizations strive to encourage. Boldness cannot be taught. People have to experience things which enable them to be bold, to take risks, and want to take risks. This means rewards must be there too or people have no reason to stick their necks out. Not just the financial reward, but more importantly, real extra responsibility and involvement in new successful and interesting projects.

Experiences of the DSG showed that the IQMS implementation did not go further than financial reward in the form of one percent pay progression, although people like Chapman (2010) stress that focus should be on developing. According to the review conducted by the National Department of Education (2007) the pay progression of one percent to teachers is the only success noted. This one and only success was noted among the many challenges identified in the implementation of the IQMS that included the non moderation of scores, the non-integrated approach in implementing the IQMS, professional development which was not happening, and the PGPs which were not renewed. Almost five years after these challenges have been identified by the National Department of Education, the scenario had not changed considering the experiences lived by the DSG as revealed in this study.

Not one single person can be confident in the DSG looking at the manner it experiences recruitment and selection. In this study, we witnessed that the DSG were inclined to conform to other people's ideas including confirming high scores for the educators even when they were

aware that the person did not deserve the score. In fact, they were reluctant to even identify gaps where seen as necessary then missed opportunities to develop the educators because of the lack of confidence and fear that they might have been seen as ‘police’. For a person that was supposed to be in an ‘accounting’ position, the lack of confidence compromised the quality of teaching and learning. The experience of inconsistency in recruitment and selection procedures of the DSG became the basis of all the negative experiences the DSG shared due to the fact that there was no basic training in the form of orientation which was to be the indication that other training sessions would follow and be continuous as human resources management systems require. This takes us to the experiences shared by the DSG in the training they received to implement the IQMS.

Similarly, the experience of lack of training contributed to the participants’ not knowing what was right and what was wrong. This led to incompetence and insecurity in the direction they needed to take in implementing the IQMS. This showed that the DSG had not experienced training as outlined in Resolution 8 of 2003 which states that training must specifically address issues relating to how the IQMS should be implemented in schools, including planning. We have learned in this study, through the experience shared by the DSG that the Departmental Officials did not plan. They went to schools ‘already under pressure’ demanding that whatever they wanted done should be done immediately and not later than ‘this minute’.

All officials, according to the Resolution must have a thorough understanding of the principles, processes and procedures. Training must enable officials to plan and administer the IQMS in a uniform and consistent manner. The NTT must clarify all the relevant issues and questions in the process of training. The NTT must train the PTT which includes the officials from the District Offices. Training in schools should be led by the District Officials. However it was evident from the experiences shared, that none of the DSG were trained to implement the IQMS. The experiences shared showed that this training was only written in black and white in the Resolution with no one to affect it, as prescribed. This confirms the findings by Wits and EPU (2005) that the IQMS is good on paper but its problem is implementation. The implementation problems are not experienced at school level only. The NTT must train the PTT and the PTT must train the District Officials who in turn must lead the training in schools. This training was

supposed to be in line with the commitment by the Department of Education through its mission to “ensure that all South Africans receive life-long education and training of high quality”.

However, experiences shared by the DSG disprove this ‘commitment’ to ‘ensure training of high quality’ in the sense that there was no evidence from the experiences shared by the DSG that this training was ever afforded to the DSG by the relevant senior offices in the Department of Education as prescribed in the Resolution. This was a requirement that was never met by the relevant offices in authority in the Department of Education. This kind of experience left the DSG at the schools void without appropriate skills to implement the IQMS. Murgatroyd and Morgan (1994) have argued that lack of appropriate skills among all educators may impact negatively on the outcomes of the whole evaluation process. This negative impact manifested in the experiences shared by the DSG with regards to training received by the DSG to implement the IQMS.

Kydd et al. (2003) mentioned that schools are experiencing a growing pressure to deliver high quality education. And there exists consensus that teachers should be encouraged and supported within the school context to develop professionally in order to deliver this high quality education. The IQMS is aimed at attaining this quality education through educator development. The experience of lack of training for the DSG to implement the IQMS was sabotage towards the attainment of this quality education. Monyatsi et al. (2006) pointed out that if the employees are to perform effectively they must be well motivated, understand what is expected of them and must have the ability and skill to fulfil their responsibility. In all respects the argument of Monyatsi et al. (2006) points at and supports training. Training to implement the IQMS is what the DSG in this study have not experienced. Riches and Morgan (1994) also argue for training through human resources management. They argue that apart from the operative functions of HRM, which include recruitment and selection, appraisal and development, HRM is involved in helping to improve performance within an institution with the longer term planning and development of human resources. HRM is the effective and efficient use of human resources which is key to successful outcomes, that is optimum performance. Supporting this idea Bush and Middlewood (1998) stressed that effective teaching and learning cannot be achieved without effective management of the people who work at school. The people working at school are its

most valuable resources and therefore must be managed accordingly. The DSG is the key resource in the IQMS implementation and therefore should be recognized as such and be managed and nurtured towards acquiring relevant skills and attitudes to implement the IQMS. The experience of lack of training by the DSG to implement the IQMS threatens the existence of the IQMS at its roots. It actually undermines the value that it is supposed to add in improving quality and learning and teaching.

Unless the DSG is trained properly to implement the IQMS, in mentoring and coaching, as appraisers and moderators, and ultimately be certificated in these, the DSG itself lacking capacity, would not be able to deliver quality services. With training and a certificate issued as proof of having received training in, for example short courses like, 'mentoring and coaching' and 'appraisers and or moderators' could help to instil confidence in the DSG to a certain extent. A certificate could also serve as a line of demarcation between the educator (the appraisee) and the DSG (the appraiser or educator developer). At the present scenario, the DSG does not get respect from the educators because according to their experience, the DSG has nothing to 'lean on'. It must not end with training and getting a certificate of recognition of skill.

After having been trained the DSG must be coached in mentoring. They must be taken through the route of being appraisers and evaluators, by monitoring the effectiveness of the training they had been given, filling the gaps where necessary, give advice, motivate, all that is necessary to sustain the person doing the job to carry on despite challenges. In the process the DSG itself is developed and as such gains confidence and 'grows'. Riches and Morgan (1994) pointed out that of all the resources at the disposal of a person or organization, it is only people who can grow and develop and be motivated to achieve a certain desired end. This is similar to what has been defined as support by other people.

Support is defined by Hawkins et al. (1991) as to supply the necessities and to give a person strength that would enable him to continue doing the job in the face of many challenges. It became evident that the experiences of the DSG, was absolute lack of support. Bush et al. (2009) noted that the main reason for the failure of quality initiative is the lack of senior management backing and commitment. Without leadership backing at all levels of the institution, the

improvement process cannot be sustained. Failure to support the DSG resulted in confusion in terms of the role they needed to play in implementing the IQMS.

There were cases where principals were seen to be discouraging the DSG as opposed to supporting the DSG. As a result, to be a member of the DSG was a frustrating experience. The DSG are de-motivated due to lack of support. Resolution 8 of 2003 requires that the educator be developed in the areas the educator has identified as his weaknesses, the ones reflected on the PGP of the educator. Evaluation should be frequent and specific in order to foster development. Teachers should get accurate information and feedback so that there is efficacy and a greater commitment to professional development. In this study we learnt that the experience has been contrary to this commitment in that the feedback was not central to the evaluation of the educators. Instead the focus was on 'cooking' the scores, which means the scores were not genuine. There was no feedback on the educators' PGP. The schools submitted PGPs year in year out just to comply with the demands from the District Office, not that they expected assistance from them. The DSG has no experience of support at all levels, from the national office down to the school level, although the Resolution states that the National Department of Education has the responsibility of providing facilities and resources to support learning and teaching.

Weber (2005) noted that the IQMS is directed at teachers. It does not explain by what procedures the National Department of Education will be made accountable (for the failure to support). The idea that the Department of Education has the responsibility of providing facilities and resources to support teaching and learning as outlined in the Resolution, is not followed through with explanations about what would be provided, how or who would monitor and evaluate the adequacy of the provision and the efficacy of the development of human resources. These are some of the experiences shared by the DSG when crying for support 'year in year out' without assistance from all levels. Who is to blame for this negative picture portrayed in the experiences of the DSG when implementing the IQMS? The experience of the DSG is that on those rare occasions when the Departmental Officials visit the schools, they go there with the upper hand, with the authority to dictate terms because they 'tell' the 'educators' and 'not the DSG' expecting to be listened to and not be questioned. This experience shows that the Departmental

Officials, when visiting schools are usually doing their routine visits and are not specifically directed to support the DSG. De Clercq (2009) argued that the strategies that have been engaged in South Africa to improve schools had shed little impact. Non-governmental organizations have worked on school intervention programs since early 1990, and so have the national and provincial departments since 1994. The picture that emerges is not a positive one. Limited results have been achieved and sustained, especially in struggling schools. This picture is disappointing given the number of people, time, effort and money invested in these school interventions. It is crucial to identify more suitable forms of accountability and support for South African schools so that they would benefit and engage in process of genuine school capacity building and empowerment. The DSG has suggested that there should be an independent structure to monitor the implementation of the IQMS. De Clercq agrees with the DSG in this study, when stating that there is a need for the DOE to develop an independently managed national evaluation system to enable them to take stock and compare the performance of the schooling system.

Participants experienced lack of knowledge in the IQMS matters and the IQMS terminology. Monyatsi et al. (2006) observed that many teachers do not understand the purpose or practices of the current teacher appraisal process due to lack of orientation and training. This has been found to be the case with the participants. Due to lack of training and orientation experienced by the participants, the participants have been found to lack knowledge in the IQMS matters and terminology. Middlewood (2001) noted that the actual performance of teachers is critical to the success of education in South Africa, hence the adoption of the IQMS as a national instrument to evaluate teachers and schools. If the IQMS was adopted and introduced for the success of education in this country, that would not be achieved when the key implementers of the IQMS, the DSG, experience lack of knowledge in the IQMS matters and terminology. Who is going to make the IQMS, (and so education in this country) succeed if the key implementers are expected to implement the IQMS without being equipped with the knowledge of the IQMS matters and the IQMS terminology? Jones et. al. (2006) emphasized that staff members are the most important resource for improvement that schools have at their disposal. This is particularly true of the DSG in the implementation of the IQMS. The DSG is fundamental in making the program effective and therefore must be empowered. Mokgalane et al. (1997) emphasized that all parties who form part of the evaluation process should be empowered to perform the task. This will

motivate and give the parties confidence and will ensure owning the process from the beginning when armed with knowledge.

The major challenge that the DSG must manage is tension between educator development and accountability. It was found that the participants experienced inability to manage tension between educator development and accountability. This is due to the experience of lack of confidence which itself is due to the experience of lack of training. Mbaliswa (2005) found that lack of training is rife in the implementation of the IQMS. All the negative experiences shared by the participants have shown that these are due to lack of training.

The core business of the IQMS is professional development. Mestry et al. (2009) pointed out that for professional development to be effective, motivation should be intrinsic rather than extrinsic. Unless there is a coherent and integrated professional development plan that grows out of the school vision for learner success to which teachers are committed, workshops and other initiatives lack meaning. In order to improve schools and provide quality learning and teaching to learners, teachers need to develop themselves professionally in their knowledge, skills, values and attitudes. They need to be self-directed. They should display willingness to learn when they have a perceived need and they desire immediate application of new skills and knowledge. The experiences of the participants have shown that this kind of training still needed to be instilled to the participants (and the teachers as a whole). When the IQMS was introduced the extrinsic kind of motivation in the form of the money incentive, was emphasized. This is why Chisholm and Hoadley (2005) noticed that the financial incentive carried by the IQMS, as opposed to the previous one, DAS, could have contributed in teacher organizations agreeing to sign the policy, paying less attention to the grey area. This was done at the expense of the core business of the IQMS which is professional development. The experiences of the DSG have shown that the participants found themselves sitting with this kind of situation. The issue is lack of confidence on the part of the DSG, which is due to lack of training, lack of support, lack of knowledge in the IQMS matters and terminology that had led to the final straw, inability to manage tension between educator development and accountability, rendering the DSG not coping with the task of being evaluators in education.

## **5.2 CONCLUSION**

The experiences of the DSG in the implementation of the IQMS in Butterworth District were found to be:

- Inconsistency in recruitment and selection procedures of the DSG
- Lack of training for the DSG to implement the IQMS
- Lack of support for the DSG at all levels when implementing the IQMS
- Lack of knowledge in the IQMS matters and the IQMS terminology
- Inability to manage tension between educator development and accountability
- Gross lack of confidence, feelings of insecurity and ambivalence

This study also became a platform for the DSG to suggest the solutions to improve the negative experiences. The suggestions were:

- Re-advocacy of the IQMS to change the attitude of the teachers towards the IQMS
- Training, not only for the DSG, but for teachers as well
- Monitoring and support by informed District Officials
- Removal of the money incentive from the IQMS and teachers get annual increment
- Formation of an independent structure to monitor the IQMS

## **5.3 RECOMMENDATIONS**

The findings of this study are only limited to the DSG of the sampled schools in Butterworth District and only in one circuit. Other researchers may conduct the same research but include educators who are the receivers of the IQMS. The same study could be taken further by conducting research in different districts in order to compare what people from different districts would say. Further research could be done to find out how capacitated are other IQMS implementers who support the schools such as the EDOs and Subject Advisers whose Institutional Management and Governance and Curriculum Management roles tie in with all the twelve performance standards in the IQMS Instrument.

In an attempt to assist the DSG, (and other IQMS implementers) Guidelines have been presented (See Appendices 9 and 9A).

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APPENDIX 1

# Integrated Quality Management System (IQMS)

## Evaluation Instruments

and

## Composite Score Sheets



Province of the Eastern Cape

DEPARTMENT OF EDUCATION  
ISEBELEZENFUNDO  
DEPARTEMENT VAN ONDERWYS

# OBSERVATION OF LESSON IN PRACTICE : DATA SHEET

NAME	
SCHOOL	
ADDRESS	
EMIS NO	
PERSAL NO	
DATE OF OBSERVATION	
NAMES OF EVALUATOR/S	
SIGNATURE OF EVALUEE	
SIGNATURE/S OF EVALUATOR/S	

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**Performance Standard: 1. CREATION OF A POSITIVE LEARNING ENVIRONMENT**

**Expectation:** The educator creates a positive learning environment that enables the learners to participate actively and to achieve success in the learning process

**Question:** Does the educator create a suitable environment and climate for learning and teaching?

**CRITERIA:** (a) Learning Space; (b) Learner Involvement; (c) Discipline; (d) Diversity

Levels of Performance		Strengths	Recommendations for Development	Contextual factors
1	<p><b>Unacceptable</b></p> <ul style="list-style-type: none"> <li>• No effort to create a learning space that is conducive to teaching and learning; <b>organisation</b> of learning space hampers teaching and learning.</li> <li>• Educator and learners appear <b>uninterested</b>.</li> <li>• <b>No discipline</b> and much time is wasted. Learners do not accept discipline or discipline is experienced by learners as humiliating.</li> <li>• Educator is <b>insensitive</b> to racial, cultural and/or gender diversity; does not respect dignity of individual learners or groups of learners.</li> </ul>			
2	<p><b>Satisfies minimum expectations</b></p> <ul style="list-style-type: none"> <li>• There is evidence of an attempt at creating and organising a suitable learning environment, which enables individual and/or group learning.</li> <li>• Learners are <b>engaged</b> in appropriate activities for most of the lesson.</li> <li>• Learners are <b>disciplined</b> and learning is not interrupted unnecessarily.</li> <li>• Learning environment is <b>free</b> of obvious <b>discrimination</b></li> </ul>			

**Performance Standard 1 : CREATION OF A POSITIVE LEARNING ENVIRONMENT**

**CRITERIA : (a) Learning Space (b) Learner Involvement (c) Discipline (d) Diversity**

<b>LEVELS OF PERFORMANCE</b>		<b>MARK</b>	<b>STRENGTHS</b>	<b>RECOMMENDATIONS</b>	<b>CONTEXTUAL FACTORS</b>
<b>UNACCEPTABLE</b>					
<b>1</b>					
(a)	No effort to create a learning space that is conducive to teaching and learning ; organisation of learning space hampers teaching and learning.				
(b)	Educator and learners appear uninterested.				
(c)	No discipline and much time is wasted. Learners do not accept discipline or discipline is experienced by learners as humiliating.				
(d)	Educator is insensitive to racial, cultural and/or gender diversity; does not respect dignity of individual learners or groups of learners.				
<b>2</b>	<b>SATISFIES MINIMUM EXPECTATIONS</b>				
(a)	There is evidence of an attempt at creating and organising a suitable learning environment, which enables individual and/or group learning.				
(b)	Learners are engaged in appropriate activities for most of the lesson				
(c)	Learners are disciplined and learning is not interrupted unnecessarily				
(d)	Learning environment is free of obvious discrimination				
<b>3</b>	<b>GOOD</b>				
(a)	Organisation of learning space enables the effective use of teaching resources and encourages and supports individual and group activities.				
(b)	Stimulating environment. Learners participate actively.				
(c)	Learners are encouraged; there is positive reinforcement.				
(d)	Learners accept discipline without feeling threatened. Educator acknowledges and respects individuality and diversity.				
<b>4</b>	<b>OUTSTANDING</b>				
(a)	Organisation of learning space shows creativity and enables all learners to be productively engaged in individual and cooperative learning.				
(b)	Learners participate actively and are encouraged to exchange ideas with confidence and to be creative.				
(c)	Learners are motivated and self-disciplined.				
(d)	Educator uses inclusive strategies and promotes respect				

**Performance Standard 2 : KNOWLEDGE OF CURRICULUM AND LEARNING PROGRAMMES**

**CRITERIA : (a) Knowledge of Learning Area (b) Skills (c) Goal setting (d) Involvement in learning programmes**

	<b>LEVELS OF PERFORMANCE</b>	<b>MARK</b>	<b>STRENGTHS</b>	<b>RECOMMENDATIONS</b>	<b>CONTEXTUAL FACTORS</b>
<b>1</b>	<b>UNACCEPTABLE</b>				
(a)	Educator conveys inaccurate and limited knowledge of learning area.				
(b)	No skill in creating enjoyable learning experience for learners.				
(c)	Little or no evidence of goal-setting to achieve curriculum outcomes.				
(d)	Makes no attempt to interpret the learning programmes for the benefit of learners.				
<b>2</b>	<b>SATISFIES MINIMUM EXPECTATIONS</b>				
(a)	Educator's knowledge is adequate but not comprehensive.				
(b)	Has some skill in engaging learners and relating the learning programme to learner's needs.				
(c)	Evidence of some goal setting to achieve curriculum outcomes.				
(d)	Makes some attempt to interpret the learning programmes for the benefit of learners.				
<b>3</b>	<b>GOOD</b>				
(a)	Educator is able to use knowledge and information to extend the knowledge of learners.				
(b)	Educator skilfully involves learners in learning areas.				
(c)	Makes every endeavour to set realistic goals to achieve curriculum outcomes.				
(d)	Displays great enthusiasm in interpreting learning programmes in the interests of the learners.				
<b>4</b>	<b>OUTSTANDING</b>				
(a)	Educator uses knowledge to diagnose learner strengths and weaknesses in order to develop teaching strategies.				
(b)	Educator uses learner-centered techniques that provide for acquisition of basic skills and knowledge and promotes critical thinking and problem solving.				
(c)	Curriculum outcomes are always achieved by being creative and innovative in the setting of goals.				
(d)	Excellent balance between clarity of goals of learning programme and expression of learner needs, interests and background.				

**Performance Standard 3 : LESSON PLANNING PREPARATION AND PRESENTATION**

**CRITERIA : (a) Planning (b) Preparation (c) Recording (d) Management of Learning Programmes.**

	<b>LEVELS OF PERFORMANCE</b>	<b>MARK</b>	<b>STRENGTHS</b>	<b>RECOMMENDATIONS</b>	<b>CONTEXTUAL FACTORS</b>
<b>1</b>	<b>UNACCEPTABLE</b>				
(a)	Little or no evidence of lesson planning.				
(b)	Lesson not presented clearly.				
(c)	No records kept.				
(d)	Learners not involved in lesson in a way that supports their needs and the development of their skills and knowledge.				
<b>2</b>	<b>SATISFIES MINIMUM EXPECTATIONS</b>				
(a)	Lesson planning not fully on a professional standard.				
(b)	Lessons are structured and relatively clearly presented.				
(c)	Evidence of essential records of planning and learner progress is available.				
(d)	Evidence of some learner involvement in lessons in a way that it supports their needs and the development of their skills and knowledge.				
<b>3</b>	<b>GOOD</b>				
(a)	Lesson planning is generally clear, logical and sequential.				
(b)	Lessons are well structured and fit into broader learning programme building on previous lessons and anticipating future learning activities.				
(c)	Essential records of planning and learning progress are maintained at a high level of proficiency.				
(d)	Good involvement of learners in lessons in such a way that it supports their needs and the development of their skills and knowledge.				
<b>4</b>	<b>OUTSTANDING</b>				
(a)	Lesson planning is abundantly clear, logical, sequential and developmental.				
(b)	Outstanding planning of lessons that are exceptionally well structured and clearly fits into the broader learning programme with evidence that it builds on previous lesson as well as fully anticipating future learning activities.				
(c)	Outstanding record keeping of planning and learner progress.				
(d)	Excellent involvement of learners in lessons in such a way that it fully support their needs and the development of their skills and knowledge.				

**Performance Standard 4 : LEARNER ASSESSMENT/ACHIEVEMENT**

**CRITERIA : (a) Feedback to learners (b) Knowledge of assessment techniques (c) Application of techniques (d) Record keeping**

	<b>LEVELS OF PERFORMANCE</b>	<b>MARK</b>	<b>STRENGTHS</b>	<b>RECOMMENDATIONS</b>	<b>CONTEXTUAL FACTORS</b>
<b>1</b>	<b>UNACCEPTABLE</b>				
(a)	No evidence of meaningful feedback to learners, or feedback irregular and inconsistent.				
(b)	Does not demonstrate an understanding of different types of assessment, eg. Only uses tests.				
(c)	Assessment results do not influence teaching strategies.				
(d)	No evidence of records, or records are incomplete and irregular.				
<b>2</b>	<b>SATISFIES MINIMUM EXPECTATIONS</b>				
(a)	Some evidence of feedback.				
(b)	Has a basic understanding of different types of assessment.				
(c)	Some evidence of corrective measures and remedial activity based on assessment results.				
(d)	Maintains essential records.				
<b>3</b>	<b>GOOD</b>				
(a)	Feedback is regular, consistent and timeously provided.				
(b)	A variety of assessment techniques are used, allowing learners to demonstrate their talents.				
(c)	Lessons are appropriately tailored to address learners' strengths and areas of weakness.				
(d)	Records are systematically, efficiently and regularly maintained.				
<b>4</b>	<b>OUTSTANDING</b>				
(a)	Feedback is insightful, regular, consistent, timeous and built into lesson design.				
(b)	Different assessment techniques used to cater for learner from diverse backgrounds, with multiple intelligence and learning styles.				
(c)	Assessment informs multiple intervention strategies to address specific needs of all learners and motivates them.				
(d)	Records are easily accessed and provide insights into individual learners' progress.				

**Performance Standard 5: PROFESSIONAL DEVELOPMENT IN FIELD OF WORK/CAREER AND PARTICIPATION IN PROFESSIONAL BODIES**

**CRITERIA :** (a) Participation in professional dev. (b) Participation in prof. bodies (c) Knowledge of Ed. issues (d) Attitude to prof. Dev.

LEVELS OF PERFORMANCE		MARK	STRENGTHS	RECOMMENDATIONS	CONTEXTUAL FACTORS
<b>1 UNACCEPTABLE</b>					
(a)	Little or no evidence of professional development.				
(b)	Makes no attempt to participate in professional bodies.				
(c)	Displays no, or superficial, knowledge on educational issues.				
(d)	Exhibits negative attitude towards development, seminars, etc.				
<b>2 SATISFIES MINIMUM EXPECTATIONS</b>					
(a)	There is evidence of some attempt to develop oneself professionally.				
(b)	Evidence of some participation in professional bodies, eg. Trade union, learning area association, etc				
(c)	Shows some knowledge of educational issues.				
(d)	Seeks further professional development.				
<b>3 GOOD</b>					
(a)	Participates eagerly in professional development programmes to improve job performance.				
(b)	Plays a role in professional bodies and involves colleagues.				
(c)	Demonstrates clear awareness of current education issues.				
(d)	Stays informed in his/her field by reading or participating in conferences and training opportunities.				
<b>4 OUTSTANDING</b>					
(a)	Takes a leading role in initiating and delivering professional development opportunities.				
(b)	Takes up leading positions in professional bodies and involves colleagues.				
(c)	Is informed and critically engages with current educational issues.				
(d)	Participates in activities which foster professional growth and tries new teaching methods/approaches and evaluates their success.				

**Performance Standard 6 : HUMAN RELATIONS AND CONTRIBUTION TO SCHOOL DEVELOPMENT**

**CRITERIA : (a) Learner needs (b) Human relations skills (c) Interaction (d) Co-operation**

	<b>LEVELS OF PERFORMANCE</b>	<b>MARK</b>	<b>STRENGTHS</b>	<b>RECOMMENDATIONS</b>	<b>CONTEXTUAL FACTORS</b>
<b>1</b>	<b>UNACCEPTABLE</b>				
(a)	The educator is insensitive to learner needs.				
(b)	No evidence of human relation skills in communicating with learners, staff and parents.				
(c)	Interacts inappropriately with learners, staff and parents.				
(d)	Lacks tact and courtesy and is not co-operative.				
<b>2</b>	<b>SATISFIES MINIMUM EXPECTATIONS</b>				
(a)	Some evidence of the educator being sensitive to learner needs.				
(b)	Some evidence of positive relationships with individuals.				
(c)	Interacts appropriately with individuals.				
(d)	Co-operates with learners, staff and parents.				
<b>3</b>	<b>GOOD</b>				
(a)	Designs internal work processes to cater for learner needs.				
(b)	Establishes trust and shows confidence in others & supports school regulations, programmes and policies.				
(c)	Demonstrates understanding and acceptance of different racial, ethnic, cultural and religious groups.				
(d)	Shares information openly, whilst respecting the principle of confidentiality.				
<b>4</b>	<b>OUTSTANDING</b>				
(a)	Adds value to the institution by providing exemplary service in terms of learner needs.				
(b)	Demonstrates respect, interest and consideration for those with whom he/she interacts.				
(c)	Conducts self in accordance with organisational code of conduct and handles contacts with parents/guardians in a professional and ethical manner.				
(d)	Supports stakeholders in achieving their goals.				

Performance Standard 7 : EXTRA-CURRICULAR AND CO-CURRICULAR PARTICIPATION

CRITERIA : (a) Involvement (b) Holistic Development (c) Leadership and coaching (d) Organisation and Administration

	<u>LEVELS OF PERFORMANCE</u>	<u>MARK</u>	<u>STRENGTHS</u>	<u>RECOMMENDATIONS</u>	<u>CONTEXTUAL FACTORS</u>
1	<b>UNACCEPTABLE</b>				
(a)	The Educator is not involved in extra-curricular or co-curricular activities.				
(b)	Makes no attempt to use these activities for the holistic development of learners.				
(c)	Leadership and coaching is inadequate.				
(d)	Organisation and administration is poor.				
2	<b>SATISFIES MINIMUM EXPECTATIONS</b>				
(a)	Not fully involved in extra-curricular and co-curricular activities.				
(b)	Makes some effort to use these activities for the holistic development of learners.				
(c)	Leadership and coaching is at an acceptable level.				
(d)	Organisation and administration is at an acceptable level.				
3	<b>GOOD</b>				
(a)	Educator is fully involved in extra-curricular and co-curricular activities.				
(b)	Educator skillfully involves learners in all activities.				
(c)	Evidence of good leadership and coaching at a pleasing standard.				
(d)	Administration and organisation is conducted professionally.				
4	<b>OUTSTANDING</b>				
(a)	Educator plays a leading role and encourages learners and staff to arrange and participate in activities.				
(b)	Educator is most successful in using these activities for the holistic development of learners.				
(c)	Leadership and coaching is at an exceptional standard.				
(d)	Administration and organisation is outstanding.				

**Performance Standard 8 : ADMINISTRATION OF RESOURCES AND RECORDS**

CRITERIA : (a) Utilisation of resources (b) Instructions (c) Record keeping (d) Maintenance of Infrastructure (e) Circulars		MARK	STRENGTHS	RECOMMENDATIONS	CONTEXTUAL FACTORS
LEVELS OF PERFORMANCE					
<b>1 UNACCEPTABLE</b>					
(a)	Does not utilise resources (human, physical or financial) optimally or abuses these resources.				
(b)	No clear instructions or guidelines are provided. Staff members are unsure what is expected of them. There is no mentoring or support of staff.				
(c)	Financial and other records are not kept or are incomplete and do not comply with departmental requirements.				
(d)	Premises, buildings and equipment are not properly maintained or are abused. There are no proper control measures or systems in place.				
(e)	Departmental circulars are not brought to the attention of staff members. No proper record is maintained and circulars are often lost.				
<b>2 SATISFIES MINIMUM EXPECTATIONS</b>					
(a)	Uses resources appropriately.				
(b)	Gives clear instructions and provides guidelines with regard to admin duties to be performed. Staff are able to meet expectations.				
(c)	Records (financial and otherwise) are kept in accordance with accepted practices and/or departmental requirements.				
(d)	Ensures that premises, buildings, equipment and learning and teaching materials are properly used and maintained. Exercises proper control.				
(e)	All Departmental circulars in respect of things that affect them, are brought to the attention of staff members.				
<b>3 GOOD</b>					
(a)	Uses resources effectively and efficiently.				
(b)	Gives clear instructions and provides sound guidelines in respect of admin duties. Staff know what is expected of them and mentor them in their duties.				
(c)	Full & complete records are kept not only in terms of departmental requirement but also of NB events and other aspects that are of interest to the institution.				
(d)	Premises, buildings, equipment are used - and maintained well. There is evidence of improvement in this regard.				
(e)	All circulars are always brought to the attention of the staff.				
<b>4 OUTSTANDING</b>					
(a)	Uses resources optimally and creatively - specifically aligned to the vision, mission and goals of the institution.				
(b)	Clear instructions and sound guidelines enable staff to do what is expected of them. Mentoring and support provides encouragement for staff to do more than is required and to do so with enthusiasm.				
(c)	Record-keeping is comprehensive and up to date, meets requirements in terms of accepted practices and/or departmental requirements.				
(d)	Premises, buildings, equipment and learning and teaching support materials are used optimally. Repairs are effected. Control systems are in place.				
(e)	Departmental circulars and other relevant information are consistently brought to the attention of staff members. Discussions are initiated to ensure that contents is understood. Responses are developed and follow-up done.				

**Performance Standard 9 : PERSONNEL**

**CRITERIA : (a) Pastoral Care (b) Staff Development (c) Provision of Leadership (d) Building commitment and confidence**

	<b>LEVELS OF PERFORMANCE</b>	<b>MARK</b>	<b>STRENGTHS</b>	<b>RECOMMENDATIONS</b>	<b>CONTEXTUAL FACTORS</b>
<b>1</b>	<b>UNACCEPTABLE</b>				
(a)	No evidence of any pastoral care for personnel.				
(b)	Does not contribute to or participate in staff development programmes.				
(c)	Does not provide any professional leadership within the institution.				
(d)	No evidence of building commitment and confidence in staff.				
<b>2</b>	<b>SATISFIES MINIMUM EXPECTATIONS</b>				
(a)	Provides pastoral care to staff members but infrequently.				
(b)	Some evidence of staff development.				
(c)	Offers professional advice to staff where necessary.				
(d)	Motivates staff members when necessary but not regularly.				
<b>3</b>	<b>GOOD</b>				
(a)	Displays personal interest in the well being of others.				
(b)	Guides and supervises the work of all staff and formulates staff development programmes on a regular basis.				
(c)	Manages staff professionally by applying democratic principles and acknowledges labour and other rights of individuals.				
(d)	Initiates, supports and encourages new ideas.				
<b>4</b>	<b>OUTSTANDING</b>				
(a)	Supports and respects the individuality of others and recognises the benefits of diversity of ideas and approaches.				
(b)	Ensures that staff training and mentoring programmes are developed, implemented and evaluated.				
(c)	Gives direction to staff in realising the institution's strategic objectives.				
(d)	Inspires and builds commitment and motivates educators through the use of intrinsic rewards or encouragement.				

Performance Standard 10 : **DECISION MAKING AND ACCOUNTABILITY**

CRITERIA : (a) Stakeholder involvement. (b) Decision making (c) Accountability/Responsibility (d) Motivation (e) Objectivity/Fairness

LEVELS OF PERFORMANCE		MARK	STRENGTHS	RECOMMENDATIONS	CONTEXTUAL FACTORS
<b>1 UNACCEPTABLE</b>					
(a)	Makes little or no attempt to involve all stakeholders in decision making process. There is little or no evidence of consensual decision making.				
(b)	Lacks decision-making skills, makes autocratic decisions without consulting or is reluctant to make any decisions or decisions are illogical. bad option				
(c)	Does not take responsibility for any decisions that are made; often tries to put blame on someone else if decision was proved to be wrong.				
(d)	Is not decisive; is unable to earn the respect of staff members with regard to the quality of decisions made and is not motivated to take leadership role.				
(e)	Decisions are seldom taken and where they are it is apparent that objectivity and fairness were not considered important.				
<b>2 SATISFIES MINIMUM EXPECTATIONS</b>					
(a)	Establishes structures and procedures that enable the involvement of all stakeholders.				
(b)	Has decision making skills; takes different views into account when making decisions.				
(c)	Takes responsibility for decisions made in most instances; sometimes tries to justify decisions that have been proved wrong.				
(d)	Is decisive, earns the respect of staff members and is able to motivate staff to participate in decision making.				
(e)	Decision taken reflect that objectivity and fairness were considerations.				
<b>3 GOOD</b>					
(a)	Ensures that all stakeholders are actively involved in decision making and that the necessary procedures are followed.				
(b)	Has good decision making skills; is able to take different points of view into account and to base decisions on sound logic.				
(c)	Is prepared to be held accountable for the decisions made.				
(d)	Staff members are willing to participate in decision making processes and respect the decisions taken.				
(e)	Objective and sound decisions take contextual factors into account in order to arrive at decisions that are fair.				
<b>4 OUTSTANDING</b>					
(a)	Ensures that whenever possible and appropriate decisions are arrived at by consensus.				
(b)	Decisions, based on wide consultation with all relevant parties and based on sound logic, are made in good time. Creative solutions are found when necessary. Is decisive without being authoritarian.				
(c)	Is prepared to be held accountable for the decision making process as well as taking responsibility for the decisions. Does not pass on the blame for wrong decisions. Ensures accountability from staff members as well as being accountable to them. Decisions are frequently proactive, not reactive.				
(d)	Staff recognise that their opinions are valued and taken into account; they are motivated to participate in decision making.				
(e)	Staff members trust the decisions made by the educator as the process has been transparent and participatory. Decisions are always objective and fair.				

**Performance Standard 11: LEADERSHIP, COMMUNICATION AND SERVICING THE GOVERNING BODY**

**CRITERIA : (a) Leadership (b) Support (c) Communication (d) Systems (e) Commitment and confidence (f) Initiative, Creativity**

LEVELS OF PERFORMANCE		MARK	STRENGTHS	RECOMMENDATIONS	CONTEXTUAL FACTORS
<b>1 UNACCEPTABLE</b>					
(a)	Demonstrates poor (or no) leadership qualities. Is reluctant to take the lead and/or has not earned the respect of colleagues; often feels threatened.				
(b)	Is unable to provide support, does not mentor or provide guidance; may often undermine colleagues; is not approachable.				
(c)	Does not communicate with colleagues, parents or the SGB; does not share information or ideas. Is not prepared to listen to alternative points of view.				
(d)	Does not work to any particular system; is disorganised and is unable to manage or control specific projects or initiatives. Productivity is low.				
(e)	Lacks commitment and confidence. Is easily swayed when challenged. Does not follow through on tasks and is easily distracted. Time management is weak/poor.				
(f)	Lacks initiative and is not creative. Will not attempt tasks without clear directives.				
<b>2 SATISFIES MINIMUM EXPECTATIONS</b>					
(a)	Takes the lead in encouraging teamwork and empowers colleagues.				
(b)	Provides guidance and support to enable colleagues to improve.				
(c)	Consults with colleagues, parents and SGB, shares information and provides reports back, is transparent and listens to alternative points of view.				
(d)	Works to basic systems; is organised and productivity is acceptable.				
(e)	Is confident and committed to serving learners, parents and the SGB. Is focused and persistent. Will follow through on tasks until completed.				
(f)	Implements systems and structures in a familiar environment. Is prepared to attempt you to improve existing systems.				
<b>3 GOOD</b>					
(a)	Provides strong leadership and direction to enable colleagues to realise strategic objectives				
(b)	Values colleagues as individuals, acknowledges their ideas; provides ongoing support and is available to guide and advise them.				
(c)	Consults with colleagues, parents and SGB; shares ideas and information; takes alternative points of view into account.				
(d)	Has improved systems that are appropriate for specific circumstances; is organised and is able to track progress. Productivity is above average.				
(e)	Has built up experiences which is the basis for confidence; is not easily distracted; supports colleagues in order to achieve goals; Time management is good; tasks are completed.				
(f)	Is innovative and is prepared to try out new ways of doing things; refines and improves existing systems and processes.				
<b>4 OUTSTANDING</b>					
(a)	Translates strategic objectives into action plans and inspires colleagues; engenders trust colleagues are motivated.				
(b)	Works with colleagues to effect improvements on an ongoing basis; is approachable and shares information and provides support while encouraging independent thinking and innovation.				
(c)	Consults with all stakeholders and listens to alternative points of view; is transparent; shares information and provides regular feedback. Responds positively to constructive criticism.				
(d)	Is innovative and has created effective systems for managing and tracking work in progress. Systems are streamlined and efficient. Productivity is high.				
(e)	Time management is very good; is able to multitask without losing focus. Takes on additional tasks or assists colleagues.				
(f)	Is innovative and creative; thinks critically and is prepared to test new ways of doing things in order to increase efficiency.				

**Performance Standard 12 : STRATEGIC PLANNING, FINANCIAL PLANNING AND EDUCATION MANAGEMENT DEVELOPMENT**

**CRITERIA : (a) Strategic Planning (b) Financial Planning (c) Project Management (d) Communication**

	<b>LEVELS OF PERFORMANCE</b>	<b>MARK</b>	<b>STRENGTHS</b>	<b>RECOMMENDATIONS</b>	<b>CONTEXTUAL FACTORS</b>
<b>1</b>	<b>UNACCEPTABLE</b>				
	(a) No evidence of strategic planning and EMD				
	(b) No/little evidence of financial planning and budgeting.				
	(c) No pre-planning/management of specific projects/interventions				
(d) Does not consult with stakeholders on decisions that effect them.					
<b>2</b>	<b>SATISFIES MINIMUM EXPECTATIONS</b>				
	(a) Has some evidence of EMD, and strategic planning.				
	(b) Basic financial records are in order and some evidence of budgeting.				
	(c) Some evidence of attempt to plan and monitor specific projects.				
(d) Some communication with stakeholders takes place.					
<b>3</b>	<b>GOOD</b>				
	(a) Prepares strategic plans with the intention of achieving the school goals.				
	(b) Maintains accurate and detailed financial records for financial planning, and accountability in terms of budget.				
	(c) Projects are planned, monitored and effectively managed.				
(d) All stakeholders are fully consulted.					
<b>4</b>	<b>OUTSTANDING</b>				
	(a) Goals and strategic plans are developed and updated with participation of stakeholders.				
	(b) Financial planning and budget are in line with the goals of the school, spending is carefully monitored and resources are used optimally.				
	(c) Introduces innovative ideas and projects which are prioritised in terms of goals, costs and educational needs, and closely manages all projects and interventions.				
(d) Systematic stakeholder consultation through functioning structures and provides opportunities for meaningful participation.					

EVALUATION OF POST LEVEL 1 (ONE) TEACHERS

NAME : \_\_\_\_\_ GRADE : \_\_\_\_\_

PERFORMANCE STANDARD 01		Raw scores	Final scores	Criteria	TOTAL (max 16)
				a	
				b	
				c	
				d	

PERFORMANCE STANDARD 03		Raw scores	Final scores	Criteria	TOTAL (max 16)
				a	
				b	
				c	
				d	

PERFORMANCE STANDARD 04		Raw scores	Final scores	Criteria	TOTAL (max 16)
				a	
				b	
				c	
				d	

PERFORMANCE STANDARD 05		Raw scores	Final scores	Criteria	TOTAL (max 16)
				a	
				b	
				c	
				d	

PERFORMANCE STANDARD 06		Raw scores	Final scores	Criteria	TOTAL (max 16)
				a	
				b	
				c	
				d	

PERFORMANCE STANDARD 07		Raw scores	Final scores	Criteria	TOTAL (max 16)
				a	
				b	
				c	
				d	

SIGNATURES :

Educator :

S.D.T. : 1.

2.

3.

EVALUATION OF POST LEVEL 2 (TWO) TEACHERS

NAME : \_\_\_\_\_ GRADE : \_\_\_\_\_

PERFORMANCE STANDARD 02		Raw scores	Final scores
Criteria	a		
	b		
	c		
	d		
TOTAL (max 16)			

PERFORMANCE STANDARD 04		Raw scores	Final scores
Criteria	a		
	b		
	c		
	d		
TOTAL (max 16)			

PERFORMANCE STANDARD 06		Raw scores	Final scores
Criteria	a		
	b		
	c		
	d		
TOTAL (max 16)			

PERFORMANCE STANDARD 08		Raw scores	Final scores
Criteria	a		
	b		
	c		
	d		
	e		
TOTAL (max 20)			

PERFORMANCE STANDARD 10		Raw scores	Final scores
Criteria	a		
	b		
	c		
	d		
	e		
TOTAL (max 20)			

PERFORMANCE STANDARD 01		Raw scores	Final scores
Criteria	a		
	b		
	c		
	d		
TOTAL (max 16)			

PERFORMANCE STANDARD 03		Raw scores	Final scores
Criteria	a		
	b		
	c		
	d		
TOTAL (max 16)			

PERFORMANCE STANDARD 05		Raw scores	Final scores
Criteria	a		
	b		
	c		
	d		
TOTAL (max 16)			

PERFORMANCE STANDARD 07		Raw scores	Final scores
Criteria	a		
	b		
	c		
	d		
TOTAL (max 16)			

PERFORMANCE STANDARD 09		Raw scores	Final scores
Criteria	a		
	b		
	c		
	d		
TOTAL (max 16)			

SIGNATURES :

Educator :

S.D.T. : 1.

2.

3.

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

EVALUATION OF POST LEVEL 3 + 4 TEACHERS

16

NAME : \_\_\_\_\_ GRADE : \_\_\_\_\_

PERFORMANCE STANDARD 01	Criteria	Raw scores	Final scores	TOTAL (max 16)
	a			
	b			
	c			
	d			
PERFORMANCE STANDARD 02	Criteria	Raw scores	Final scores	TOTAL (max 16)
	a			
	b			
	c			
	d			
PERFORMANCE STANDARD 03	Criteria	Raw scores	Final scores	TOTAL (max 16)
	a			
	b			
	c			
	d			
PERFORMANCE STANDARD 04	Criteria	Raw scores	Final scores	TOTAL (max 16)
	a			
	b			
	c			
	d			
PERFORMANCE STANDARD 05	Criteria	Raw scores	Final scores	TOTAL (max 16)
	a			
	b			
	c			
	d			
PERFORMANCE STANDARD 06	Criteria	Raw scores	Final scores	TOTAL (max 16)
	a			
	b			
	c			
	d			
PERFORMANCE STANDARD 07	Criteria	Raw scores	Final scores	TOTAL (max 16)
	a			
	b			
	c			
	d			
PERFORMANCE STANDARD 08	Criteria	Raw scores	Final scores	TOTAL (max 20)
	a			
	b			
	c			
	d			
	e			
PERFORMANCE STANDARD 09	Criteria	Raw scores	Final scores	TOTAL (max 16)
	a			
	b			
	c			
	d			
PERFORMANCE STANDARD 10	Criteria	Raw scores	Final scores	TOTAL (max 20)
	a			
	b			
	c			
	d			
	e			
PERFORMANCE STANDARD 11	Criteria	Raw scores	Final scores	TOTAL (max 24)
	a			
	b			
	c			
	d			
	e			
	f			

SIGNATURES : \_\_\_\_\_

Educator : \_\_\_\_\_

S.D.T. : 1. \_\_\_\_\_

2. \_\_\_\_\_

3. \_\_\_\_\_

Performance Standard :

CRITERIA : (a) (b) (c) (d)

	<u>LEVELS OF PERFORMANCE</u>	<u>MARK</u>	<u>STRENGTHS</u>	<u>RECOMMENDATIONS</u>	<u>CONTEXTUAL FACTORS</u>
1	<u>UNACCEPTABLE</u>				
(a)					
(b)					
(c)					
(d)					
2	<u>SATISFIES MINIMUM EXPECTATIONS</u>				
(a)					
(b)					
(c)					
(d)					
3	<u>GOOD</u>				
(a)					
(b)					
(c)					
(d)					
4	<u>OUTSTANDING</u>				
(a)					
(b)					
(c)					
(d)					

Performance Standard :

CRITERIA : (a) (b) (c) (d)

LEVELS OF PERFORMANCE		MARK	STRENGTHS	RECOMMENDATIONS	CONTEXTUAL FACTORS
UNACCEPTABLE					
1					
(a)					
(b)					
(c)					
(d)					
(e)					
2					
SATISFIES MINIMUM EXPECTATIONS					
(a)					
(b)					
(c)					
(d)					
(e)					
3					
GOOD					
(a)					
(b)					
(c)					
(d)					
(e)					
4					
OUTSTANDING					
(a)					
(b)					
(c)					
(d)					
(e)					

CRITERIA : (a) (b) (c) (d) (e) (f)

	LEVELS OF PERFORMANCE UNACCEPTABLE	MARK	STRENGTHS	RECOMMENDATIONS	CONTEXTUAL FACTORS
1					
(a)					
(b)					
(c)					
(d)					
(e)					
(f)					
2	SATISFIES MINIMUM EXPECTATIONS				
(a)					
(b)					
(c)					
(d)					
(e)					
(f)					
3	GOOD				
(a)					
(b)					
(c)					
(d)					
(e)					
(f)					
4	OUTSTANDING				
(a)					
(b)					
(c)					
(d)					
(e)					
(f)					

**COMPOSITE SCORE SHEET FOR USE IN PERFORMANCE 20**

**MEASUREMENT FOR PAY PROGRESSION AND GRADE**

PROGRESSION FOR Level 1 Educators (28 CRITERIA)

EDUCATOR : \_\_\_\_\_

PERSONAL NO : \_\_\_\_\_

SCHOOL : \_\_\_\_\_

DATE : \_\_\_\_\_

PERFORMANCE STANDARDS		MAX	SCORE
1	Creation of a positive learning environment	16	
2	Knowledge of curriculum and learning programmes	16	
3	Lesson planning, preparation and presentation	16	
4	Learner assessment	16	
5	Professional development in field of work/career and participation in professional bodies	16	
6	Human Relations and contribution to school development.	16	
7	Extra-Curricular & Co-Curricular participation.	16	
<b>TOTAL SCORE</b>		<b>112</b>	

THE ABOVE-MENTIONED EDUCATOR'S SCORE has been/has not been ADJUSTED.

COMMENTS/REASONS FOR ADJUSTMENT:

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

To qualify for Salary Progression the educator needs to obtain 56.  
To qualify for Grade Progression the educator needs to obtain 78.

I agree / do not agree with the overall performance rating.

EDUCATOR : \_\_\_\_\_

DSG : \_\_\_\_\_

PRINCIPAL : \_\_\_\_\_

DATE : \_\_\_\_\_

DATE : \_\_\_\_\_

DATE : \_\_\_\_\_

**COMPOSITE SCORE SHEET FOR USE IN PERFORMANCE**

21

**MEASUREMENT FOR PAY PROGRESSION AND GRADE**

PROGRESSION FOR Level 2 Educators (42 CRITERIA)

EDUCATOR : \_\_\_\_\_

PERSONAL NO : \_\_\_\_\_

SCHOOL : \_\_\_\_\_

DATE : \_\_\_\_\_

PERFORMANCE STANDARDS		MAX	SCORE
1	Creation of a positive learning environment	16	
2	Knowledge of curriculum and learning programmes	16	
3	Lesson planning, preparation and presentation	16	
4	Learner assessment	16	
5	Professional development in field of work/career and participation in professional bodies	16	
6	Human Relations and contribution to school development.	16	
7	Extra-Curricular & Co-Curricular participation.	16	
8	Administration of resources and records	20	
9	Personnel and Management	16	
10	Decision making and accountability	20	
<b>TOTAL SCORE</b>		<b>168</b>	

THE ABOVE-MENTIONED EDUCATOR'S SCORE has been/has not been ADJUSTED.

COMMENTS/REASONS FOR ADJUSTMENT:

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

To qualify for Salary Progression the educator needs to obtain 84.  
 To qualify for Grade Progression the educator needs to obtain 118.

I agree / do not agree with the overall performance rating.

EDUCATOR : \_\_\_\_\_

DSG : \_\_\_\_\_

PRINCIPAL : \_\_\_\_\_

DATE : \_\_\_\_\_

DATE : \_\_\_\_\_

DATE : \_\_\_\_\_

X 2



**DRAFT**  
**TRAINING STRATEGY**  
 for  
 Teacher Performance Appraisal (TPA)  
 &  
 EMS-PMDS-Principals/Deputy Principals/Office-based educators

### 1. INTRODUCTION AND BACKGROUND

The purpose of the discussion document on a National Training Strategy is, amongst others, to identify effective ways to structure a training programme for educators on the TPA and the EMS-PMDS. Upon agreement on the revised appraisal systems at the level of the ELRC, all educators need to be trained. Training will occur before implementation of the appraisal instruments.

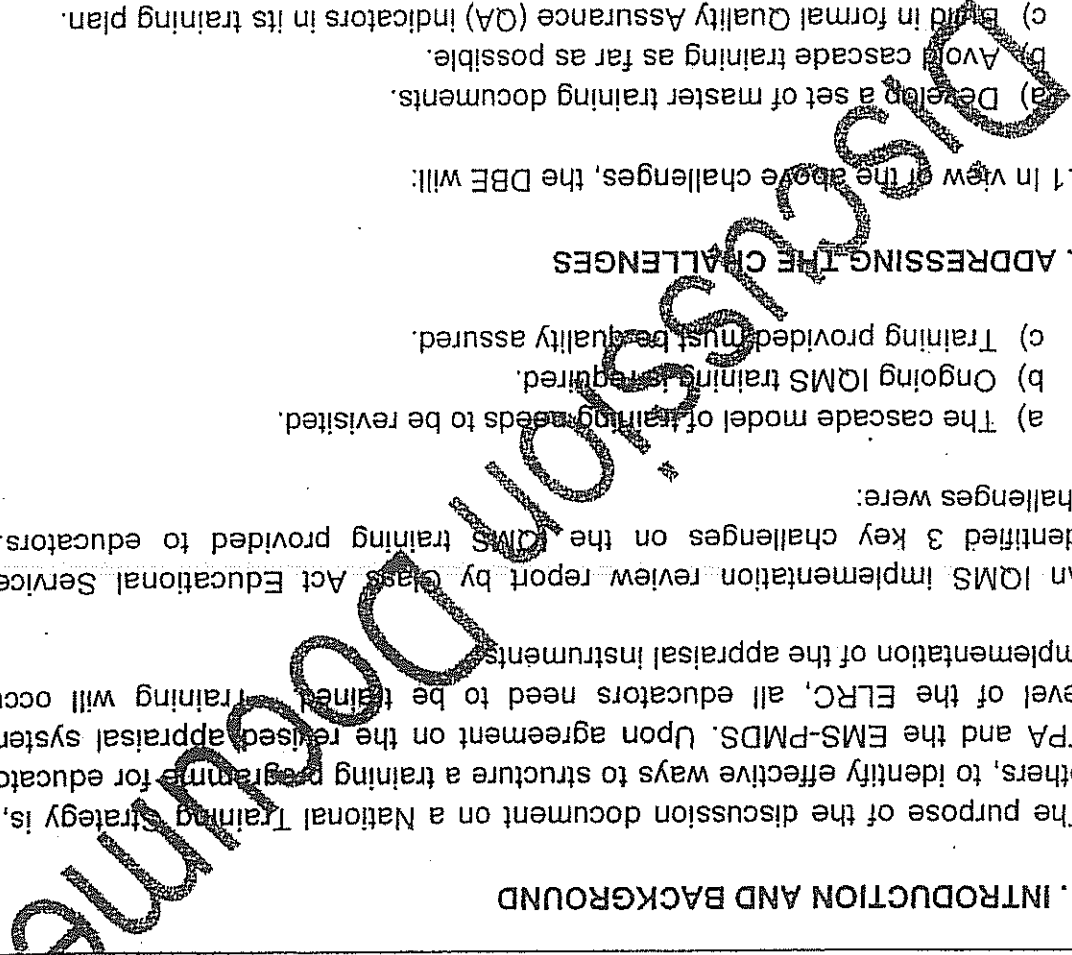
An IQMS implementation review report by Class Act Educational Services (2007) identified 3 key challenges on the IQMS training provided to educators. These challenges were:

- a) The cascade model of training needs to be revisited.
- b) Ongoing IQMS training is required.
- c) Training provided must be quality assured.

### 2. ADDRESSING THE CHALLENGES

2.1 In view of the above challenges, the DBE will:

- a) Develop a set of master training documents.
- b) Avoid cascade training as far as possible.
- c) Build in formal Quality Assurance (QA) indicators in its training plan.
- d) Stipulate that training should be delivered by a core team of experts, to ensure standardized, correct dissemination of information.
- e) Stipulate training conditions to the provinces. These conditions will require that:
  - Master trainers thoroughly train the trainers.
  - There is a minimum duration in the provision of training.
  - There are minimum venue requirements.



- There is a specified maximum number of participants per group by
- regulating the trainer-trainee ratio.
- There is no cascade training from workshop attendants to colleagues at schools.

2.2 The training strategy is based on the following focus areas:

- Criteria and procedure for selecting facilitators
- Effective ways of training educators
- Structure of training
- Logistics and time-frames
- Effective training programmes
- Training of educators in farm/rural and small schools
- Training venues
- Resources needed
- Training costs
- Monitoring and follow-up

### 3. FOCUS AREAS IN THE TRAINING STRATEGY

#### 3.1 Criteria and procedure for selecting facilitators

- The facilitators will be identified from officials within the current IQMS and education structures in the DBE and PEDs.
- The requirements for facilitators will be as follows:
  - Proven training and knowledge expertise within the DBE or PED structures
  - Management experience
  - A completed course in Assessor or Moderator training would be considered an asset
  - Previous IQMS training experience
  - Extensive knowledge of Performance Measurement Systems, Educational policies and the legislative framework within which they operate
  - Sound knowledge of MS word, Excel and PowerPoint.
  - Sound presentation skills
  - Able to manage diverse groups and multi level approach of training

Draft Document

- Sound communication skills (communicate confidently in the required languages)
- Contactable by means of phone/cellphone and e-mail

### 3.2 Effective ways of training educators

- Assumption - that the trainees have knowledge and can contribute to the training
- Cooperative and interactive strategies will be used
- Practical Group work and feedback to the trainees will form part of the training strategy
- A system of acknowledgement and rewards for good contribution will be embraced
- Examples used in training will relate to the place of work
- There will be minimum use of ice breakers.

### 3.3 Structure of training

- National Training Team (NTT) - DBE officials and QMS Project managers
- Provincial Training Team (PTT) - External moderators and provincial/district QMS coordinators
- PTT to facilitate training at District and Circuit level
- After training the PTT, the NTT will monitor the work of the PTTs in the provinces
- Training will be planned to run parallel in districts across the provinces
- The training of educators on the TPA and the EMS-PMDS will be conducted simultaneously.

### 3.4 Logistics and time frames

- One (1) month will be set aside for the training of the NTT and their training of the PTT
- 80 educators per venue is the maximum number recommended
- Ratio of trainer to trainee will be 1:40
- One day of training per cluster
- Interactive training approach:- engaging in appropriate activities to embed knowledge
- 2 trainers to be assigned per training session.

### 3.5 Effective training programme

- A cluster training approach for Circuit Managers, subject advisors together with principals and deputy principals.
- The master training documents will contain a number of practical activities that enhance understanding of the drawing up of Performance agreements, Key Performance Areas, work plans, PGPs as well as completing appraisal instruments, etc
- One day training with follow-up of monitoring, evaluation and support for principals / deputy principals and office-based educators.
- Circuit Managers will be advised to cluster Principals into mixed skill level groups that can function as cooperative teams after the initial training.
- Districts to follow-up with continuous training after completion of the first training.

### 3.6 Training of educators in farm/rural and small schools

- They will be clustered in terms of their farms proximity and where possible they will be included in the existing venues.
- Residential training for small and farm schools where they are accommodated at the one venue.
- These logistical arrangements are set on the basis of distance and their unique circumstances e.g. size, multi-grade classes and number of educators, lack of facilities, etc.

### 3.7 Training venues

- Training venues will include, amongst others, the following: school and community halls, teacher centres, district office, etc.
- Appropriate venues for training to be selected for the identified groups. District Office will also advise on suitable and cost effective venues.
- Requirements of venues:
  - Accessible to public transport
  - Adequate parking facilities
  - Projection screen, PA system if required, power points, etc...
  - Suitable furniture: Tables, chairs
  - Clean toilets, catering facilities
  - Good ventilation

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### 3.8 Resources needed

- Data Projectors
- Laptops
- Extension leads
- Adaptors
- Projection screens: Fixed or portable
- Markers
- Writing Pads
- Pens
- Flip Charts
- Bottled water for facilitators

### 3.6 Training costs

- Writing of the Master training material by service provider.
- Costs for writing team/service provider to compile/write manual
- Transport
- Printing
- Distribution of Training resources
- Catering: Average of R 60,00 per person day if catering is outsourced. R30,00 per person per day if school caterers
- Accommodation: R 800 per facilitator per event
- S and T allowance for facilitators
- Hiring costs:- Venue
- Other resources: Data Projector, PA System, etc
- Stationery for training teams.

### 3.7 Monitoring and follow-up

- Sampling of schools by NTT and PTT
- District IQMS Coordinators to select a follow-up sample
- Moderators, circuit managers and curriculum officials to perform appropriate follow-ups by visiting schools and providing support where necessary.
- IQMS Project Managers and Moderators to monitor implementation of the appraisal system in schools and districts.
- Follow-up reports will be prepared on an approved template.
- A copy of the follow-up reports will be left at the school/district.

- External Service Providers will only be considered where there is a skills/capacity shortage in a particular province.
- As the training rolls out, the PTT will report to the NTT on a weekly basis.
- Provinces need to engage in thorough strategic and financial planning.
- The DBE and PEDs will be responsible for appropriately equipping and empowering the NTT and PTT respectively to perform their task effectively.

#### 4. CONCLUSION

Discussion Document

APPENDIX 4

INTERVIEW SCHEDULE

A. INTRODUCTION

Name of School

Name

Gender

Number of years teaching

Number of years as DSG

Number of educators you mentor

B. EFFECTIVENESS OF TRAINING RECEIVED BY THE DSG

1. Describe the type of training you received when you became DSG? Tell me everything about your training.
2. Part of the training includes conflict resolution. Now take me through what you would do in the case of a dispute.
3. How has the training prepared you to do your job as DSG? Why do you say this?

C. SUPPORT RECEIVED BY THE DSG

1. Describe the form of support that you receive while performing your duty as DSG?
2. In relation to the Department of Education what support have you received and when?
3. Tell me your concerns about the support?
4. What motivates you to carry on with your duties as DSG?

**D. SUCCESS AND EFFECTIVENESS OF IQMS IMPLEMENTATION**

1. In your own view, what are the strengths and weaknesses of school IQMS implementation?
2. What improvements could be done?



Faculty of Education

School of Postgraduate Studies

Chr Fleet & Cambridge Street  
East London & Stuart Hall, Alice

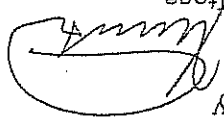
Phone: East London: 043704 7219 | Fax: 043-7047228  
Alice: 0406022103  
nsibeko@ufh.ac.za/tmalima@ufh.ac.za

-09 July 2010

To whom it may concern

This is to confirm that Ms JN Ndandani-Msindwana is MEd candidate at the University of Fort Hare. As fulfilment for her programme, she needs to undertake a research study, and has identified your school as a research site. Her research title is "An investigation into the experiences of the development support group (DSG) in implementing IQMS with special reference to Butterworth District, Eastern Cape". She is due to collect data from July 2010. Kindly grant her permission.

I can be contactable in the following numbers: 043-704 7227/7228

Sincerely  
  
Dr. X. Mtose  
Research Promoter

APPENDIX 6

Ngcingwane Administrative Area

Mpopheni Location

Dutywa

30 October 2010

The District Director

Department of Education

Butterworth

Sir

RE: REQUEST TO CONDUCT RESEARCH IN BUTTERWORTH

Request is herein sought to conduct research in Butterworth District. The researcher is a student enrolled for M.Ed degree at the University of Fort Hare. The research is the requirement to fulfill the degree. The research topic is: An investigation into the experiences of the Development Support Group (DSG) when implementing IQMS (Integrated Quality Management System) in Butterworth District, Eastern Cape. My supervisor is Dr X. Mtose. A letter from the University of Fort Hare that introduces me is attached.

I can be contacted at this number 0474891147.

Thanking you in advance.

Yours faithfully

JN Ndamani-Mssindwana (Mrs).



OFFICE OF THE SUPERINTENDENT-GENERAL  
Steve Vukile Tshwete Education Complex • Private Bag X0032 • Bhebe • 6605 • REPUBLIC OF SOUTH AFRICA  
Tel: +27 (27) 608 4205 • Fax: +27 (40) 608 4249 • Website: ecprov.gov.za • Email: nvamkaka.lokwe@eddi.ecprov.gov.za

05 October 2010

JN Ndandani-Msindwana  
36 Maple Creek Crescent  
Dorchester Heights  
East London  
5241  
Dear Mrs Msindwana


**PERMISSION TO UNDERTAKE RESEARCH: INTEGRATED QUALITY MANAGEMENT SYSTEM – CHALLENGES FACING THE DEVELOPMENT SUPPORT GROUP (DSG) IN IMPLEMENTING IQMS**

1. Thank you for your correspondence received on 26 May 2010.

2. Your application to conduct the above mentioned research in the Eastern Cape Primary and Secondary Schools under the jurisdiction of the Butterworth District is hereby approved on condition that:

- a. there will be no financial implications for the Department;
- b. institutions and respondents must not be identifiable in any way from the results of the investigation;
- c. you present a copy of the written approval of the Eastern Cape Department of Education (ECDOE) to the District Directors before any research is undertaken at any institutions within that particular district;
- d. you will make all the arrangements concerning your research;
- e. the research may not be conducted during official contact time, as educators' programmes should not be interrupted;
- f. should you wish to extend the period of research after approval has been granted, an application to do this must be directed to the Director: Strategic Planning Policy Research and Secretarial Services;
- g. the research may not be conducted during the fourth school term, except in cases where a special well motivated request is received;

ACTING HEAD: EDUCATION

Mr. R Swartz  


3. The Department wishes you well in your undertaking. You are most welcome to contact the Director, Dr. Annetta Heckroodt on 043 702 7430 or mobile number 083 271 0715 should you need any assistance.
- i. you present the Department with a copy of your final paper/report/dissertation/thesis free of charge in hard copy and electronic format. This must be accompanied by a separate synopsis (maximum 2 – 3 typed pages) of the most important findings and recommendations if it does not already contain a synopsis. This must also be in an electronic format.
  - j. you are requested to provide the above to the Director: The Strategic Planning Policy Research and Secretariat Services upon completion of your research.
  - k. you comply to all the requirements as completed in the Research Policy duly completed by you.
  - l. you comply with your ethical undertaking (commitment form).
  - m. You submit on a six monthly basis, from the date of permission of the research, concise reports to the Director: Strategic Planning Policy Research and Secretariat Services.
- h. your research will be limited to those schools or institutions for which approval has been granted;

APPENDIX 8

Consent Form

This serves to invite you to participate in an interview session that I will conduct in your school. The date of the interview will be communicated to you in the near future.

I am a candidate for a degree of Master of Education (M.Ed) at the University of Fort Hare. I am conducting a research on Integrated Quality Management System (IQMS). This research project is going to be submitted to the Faculty of Education at the above university in fulfillment of the requirements for the degree of Masters in Education. My research title is: "An investigation into the challenges facing the Development Support Group (DSG) in implementing IQMS with special reference to Butterworth district, Eastern Cape". My promoter is Dr. X. Mtsose whose confirmation letter is attached.

This study seeks to investigate challenges facing the DSG in implementing IQMS in schools. There is a need for quality at all levels in an organization or business – in products, in service and in the system to deliver them. This study attempts to find out if the DSG is in a position to deliver quality services in the implementation of IQMS so as to allow IQMS to pass the test of being an appraisal system of quality. The study also aims at getting ways and means of improving IQMS process as a whole.

In the implementation of IQMS the DSG forms part of evaluation process in education. This means the DSG is faced with the task of mentoring and coaching as well. Its importance is to monitor and enhance performance in schools. The DSG is responsible for baseline and summative evaluation of educators. It is in the execution of its duties that the DSG is likely to encounter challenges.

The problem that this study aims to address is whether the DSG that is faced with the task of evaluating educators with the aim of identifying strengths and weaknesses is able to cope with this task. Apparently educators (perhaps including the DSG), view the evaluation process as means of advancing their salaries by way of getting one percent pay progression after submitting summative evaluation scores. The emphasis seemingly is on one percent pay progression rather than educator development. It seems there is tension between the incentive of one percent pay progression and accountability. As mentors in the process of IQMS implementation and educator development the DSG must address these challenges. It is therefore important for the researcher to get information from the DSG if she is interested to know and understand these challenges (if any).

The research investigates these challenges by interviewing the DSG. In order to get balanced information three DSG members from three categories will be interviewed. The categories are: primary, junior secondary, and high school. The experiences of the DSG are of vital importance because they are the ones who are doing the actual operation.

The purpose of the research is to investigate the experiences of the DSG in implementation of IQMS in Butterworth district.

The study will be of great value to the IQMS implementers, especially the DSG, as it will serve as a platform for them to deepen or raise their voice. The study will contribute towards empowering educators, School Management Teams (SMT) and principals by improving their knowledge of Quality Management Systems in education. District officials will also benefit. Probably it will be the first time they hear what the DSG says. They are going to get the information from the people who are doing the spade work, from the horse's mouth so to speak. This will help them to know where exactly they must put emphasis on when supporting the schools. The provincial IQMS officials will also be able to make informed decisions as to which areas that need urgent interventions and those that will require longtime planning.

Based on the findings, the researcher seeks to present guidelines to improve the process of educator evaluation. The recommendations that will be made will assist the Department of Education to make informed decisions in as far as the evaluation of teachers and the implementation of IQMS is concerned.

Participants will be requested to sign consent forms to participate in the research after the purpose of the research had been explained to them. Participants are assured of anonymity and confidentiality. Participation is voluntary. Participants can withdraw participation any time they want to.

I can be contacted at the following numbers: 0474891147/2162

JN Ndamani-Msindwana

## APPENDIX 9

### GUIDELINES TO ASSIST THE DSG IN IQMS IMPLEMENTATION

#### INTRODUCTION

##### *1.1 Provincial/District IQMS Coordinator*

Make an appointment with the school and arrange a date for a visit. Tell them you are coming to assist them in IQMS. Ask each teacher to bring his/her PGP (personal growth plan) forms, the instrument, Resolution 8 of 2003, a book to write on and a pen. Ask that the sitting be arranged in a round table manner so that you are visible to everyone.

By asking the teachers to bring these items, you are sort of creating curiosity on their part. You are therefore prompting them to make research and ask questions amongst themselves even before you get there. This prepares for a very lively discussion with the staff. You are inviting their involvement. By this whole exercise you are complying with Performance Standard Number One of the Instrument (See Appendix/). In IQMS terminology you are creating a positive learning environment.

#### DEVELOPMENTAL CYCLE NUMBER ONE

IQMS Developmental Cycles must be mentioned. Developmental Cycle No. 1 must be defined (See Appendix 9A). This will give the DSG ground to stand on. Without this kind of training and explanation, the DSG cannot cope

#### THE PERSONAL GROWTH PLAN (PGP) (See Appendix 2)

Talk about the PGPs. Look at how they are drawn. Interact with the educators making reference to their PGPs. Find out why the educator had written that particular performance standard as the area in which he she would like to be developed. The educator must give reasons why this performance standard and not that other one.

Talk about the format of the PGP that requires the educator to indicate which performance standard and what criterion. Look and talk about the column that says: 'can get assistance from'. Expatiate on this making reference to the Collective Agreement. Now you are moving away from what the participants referred to as "theories" in IQMS. The educator must have full understanding of all the four criteria in each performance standard. This understanding should be discussed and demonstrated with the teachers. This leads to the unpacking of the performance standards (See Appendix 9A.

The attention of the teachers should be drawn to the fact that Performance Standards 1-4 directly address the educator's skills in Curriculum and Classroom Management. It is in the implementation of performance standards 1-4 that the educator will be able to detect his/her strengths and weaknesses. This gives the educator the basis to evaluate him/herself in the form of what is termed base-line evaluation in IQMS. This enables the educator to indicate the areas in which he/she needs to be developed per performance standard and criterion as shown in the PGP form (Appendix 3).

Performance Standard Number One is used as an example.

Performance Standard 1: Creation of a positive learning environment

Learning space: Most educators limit this to having classrooms.

Learner involvement: This is limited to written work.

Discipline: This is confused with discipline in general and the use or not use of corporal punishment.

Diversity: Most educators are just silent about this criterion.

See Appendix 9A for examples of unpacking of the performance standards to equip the implementers.

## APPENDIX 9A

### PRESENTATION

### INTEGRATED QUALITY MANAGEMENT SYSTEM (IQMS)

### UNPACKING THE PERFORMANCE STANDARDS

### INTRODUCTION

Good day colleagues. I believe each one of you has his/her pen and writing pad, PGP, Instrument, and the Collective Agreement - Resolution 8 of 2003 ready.

I want everybody to relax, take down notes as we proceed with the discussion. I prefer to call this a discussion (not workshop) because I want everybody to participate and contribute.

As we proceed I want you to take note of what is to be new to you and what not. You may end up saying there is nothing new, or if there is what is it?

We all know that the main objective of the Department of Education is the attainment of quality learning and teaching. IQMS is one of the endeavours to achieve this goal. Now let us look at IQMS.

Colleagues if you are looking for IQMS do not look up in the sky. IQMS is built-in in your everyday school work. It must not be divorced from it. IQMS must be implemented daily and development must be continuous. Summative evaluation scores must not just mushroom at the end of the year without evidence of what has taken place during the course of the year.

### DEVELOPMENTAL CYCLE NUMBER ONE

You know very well that IQMS has two developmental cycles, Developmental Cycle No 1 and Developmental Cycle No. 2. Today we are looking at Developmental Cycle No 1. When we are talking about Developmental Cycle No 1 we are talking about Performance Standards 1 - 7 as shown in the Instrument (Appendix I). According to Resolution 8 of 2003, Developmental Cycle No 1 is the responsibility of the school. It is common to find teachers not implementing IQMS,

folding arms in the school saying: "we have not been developed." It is explained clearly in the Resolution that all development in this cycle is happening at school by the teachers themselves at the initiative of the teachers. The DSG (observer) goes to the class to evaluate scores that have been given by you during self-evaluation. Let us demonstrate this by looking at your PGPs and Performance Standard No 1.

#### CREATION OF A POSITIVE LEARNING ENVIRONMENT

At this stage we make examples of two teachers teaching a lesson:

#### PHOTOSYNTHESIS

This leads to the discussion of the lesson observation instrument. The instrument is in two parts. One part is made up of 4 Performance Standards (PS) dealing directly with the observation of the teacher in the classroom. This part is designed for DA, PM and WSE. The other part of 8 PS relates to aspects of evaluation that fall outside the classroom.

#### THE FIRST 4 PERFORMANCE STANDARDS

- The creation of a positive learning environment
- Knowledge of curriculum and learning programmes
- Lesson planning, preparations and presentation
- Learner assessment

Each of the PS asks a question:

Does the educator demonstrate adequate knowledge of the learning area, and does she use this knowledge effectively to create meaningful experiences for learners?  
Is lesson planning clear, logical and sequential, and is there evidence that individual lessons fit into a broader learning programme  
Is assessment used to promote teaching and learning?

During observation the DSG observes if the lesson answers the questions asked by the PS. Then scores are allocated accordingly.

## CRITERIA AND THE RATING SCALE

Each PS includes a number of criteria. For each of these criteria there are four descriptors which are derived from the four point rating.

Rating scale 1: unacceptable

Rating scale 2: Satisfies minimum expectations

Rating scale 3: Good. Performance good and meets expectations

Rating scale 4: Outstanding. Performance exceeds expectations

Let us now go back to our example of a lesson in Biology on Photosynthesis.

We have two teachers who are teaching a lesson on Photosynthesis on a Monday. The DSG (and Peer) observe the lesson.

Teacher A

On Friday afternoon Teacher A had asked the learners to bring to school leaves because she is going to teach a new lesson. On Monday, most learners bring leaves to the school. Perhaps teacher A also brings some leaves. If the teacher brings leaves too, learners will compare their leaves with that of the teacher. The debate about the lesson will start with the learners even before the actual lesson starts. Leaves brought by the learners will be of different colours because they will include even flowers.

At the start of the lesson each and every learner is curious, is interested, is alert, do not want to miss a step of what the teacher is going to do or say. The teacher starts the lesson by asking that the white, pink yellow or purple 'leaves' must be put aside today because our lesson is about green leaves. Our lesson today is Photosynthesis: a process by which plants manufacture food in the green leaves. Then the teacher goes on and on and on.

Nothing was said by the teacher to the learners on Friday. Gets into the class, greets the learners and writes on the board: Photosynthesis. Our lesson today is Photosynthesis. The learners are quiet and means a process by which plants manufacture food in the green leaves. The learners are quiet 'listening' to the teacher. The teacher turns her back for a second or third time to draw green leaves on the board trying to demonstrate her lesson. The teacher makes a drawing of green leaves using a white piece of chalk and arrows to indicate 'green leaves.' Some learners comment amongst themselves that the teacher lies because the leaves are white not green. Others laugh saying the drawing is a frog or a crab but not leaves. A lot is going on amongst the learners. Others distribute letters that say they are drowsy they wish the period is over. Some even make a cartoon of the teacher. When the teacher finds out, the teacher is angry, frustrated and feels not respected by the learners. The teacher leaves the class and goes to the staffroom and tel the other teachers that learner so and so has done this to him/her. Teachers sympathize (of course some not) and advise the matter must be reported to the principal, who must summon the parent of the learner to come to the school for the behavior of the learner. The issue escalates and spreads like cancer in the whole school with teachers taking sides, some with the teacher, some with the principal and some with the learner and parent.

### EXERCISE/ACTIVITY

The DSG must allocate scores to the two teachers using the 4 point IQMS rating scale. Give explanation why you have allocated the score. Say why the lesson presentation is unacceptable, or satisfies minimum expectations, or good or outstanding.

Prepare for a post observation discussion with educator on the lesson presented. Refer to the questions asked pertaining to each PS or criterion. Has the educator demonstrated knowledge of the learning area? Is lesson plan clear, logical and sequential? Is assessment used to promote learning and teaching?

Comment on the fulfillment of each criterion: a) Learning space, b) Learner Involvement, c) Discipline, d) Diversity