

INVESTIGATING MIDDLE MANAGEMENT'S ROLES IN
IMPLEMENTING THE NEW CURRICULUM AT
GRADE 10 – 12 LEVEL:
A CASE OF TWO SCHOOLS IN THE KWAZULU-NATAL
MIDLANDS

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ABSTRACT

This research sought to investigate middle management's roles in implementing the new curriculum at grade 10 -12 levels; it involved a small qualitative study of two schools in the KwaZulu-Natal midlands. At a policy level, the role of middle managers at school level in South Africa has changed. The transformation of the curriculum in South Africa placed a need in all spheres of the education system to be flexible and innovative in accepting change. In fact this need for change is mostly required by the middle management of the schools who bear the brunt of working with teachers and learners in implementing the new curriculum. Hence this qualitative study was undertaken to investigate their roles.

In investigating the topic the following three questions were considered as of critical importance in understanding middle managers roles in the new curriculum. The first question explored middle managers' main roles in implementing the new curriculum. Secondly it explored how middle managers responded to the current reform process at the FET level, and lastly it investigated how middle managers intertwined assessment in implementing the new curriculum. The review of the literature focused on curriculum implementation internationally and locally and also explored the role of the middle managers as leaders and managers in the curriculum implementation process. The study took place in two rural schools and participants included four middle managers (three heads of department and one principal). Data were collected using semi-structured questionnaires and interviews. A selection of documents (planning and teaching documents) was also collected for analysis. In a nutshell analysis revealed that endeavours were made towards the planning process. There was a presence of the subject framework, work schedule and the lesson plan. This indicated that the initial process of designing the learning programmes was being done. However, data revealed that middle managers fulfilled a management rather than leadership function. Their roles consisted largely of curriculum implementation processes at the expense of curriculum innovation and change. Barriers included a lack of time for proper planning and innovation due to a full teaching load as well as a lack of training by the Department of Education in the area of curriculum development and innovation.

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DECLARATION

I hereby declare that the work in this thesis has been researched and undertaken by myself and unless specifically indicated to the contrary in the text, is my own work.

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ABBREVIATIONS USED

GET	GENERAL EDUCATION AND TRAINING
FET	FURTHER EDUCATION AND TRAINING
NCS	NATIONAL CURRICULUM STATEMENT GRADE 10 – 12
OBE	OUTCOMES BASED EDUCATION
RNCS	REVISED NATIONAL CURRICULUM STATEMENT
NDOE	NATIONAL DEPARTMENT OF EDUCATION
SGB	SCHOOL GOVERNING BODY
SASA	SOUTH AFRICAN SCHOOLS ACT
PPN	POST PROVISIONING NORM
LTSM	LEARNING AND TEACHING SUPPORT MATERIAL

CHAPTER 1

1. RATIONALE FOR THE STUDY

1.1 BACKGROUND TO THE STUDY

This study focuses on investigating the roles played by middle management in implementing the new curriculum at grades 10-12, the Further Education and Training (FET) band of the secondary schools in KwaZulu-Natal South Africa.

Part of the task of middle management in a school is to see to it that the vision of the school and the National Department of Education (DoE) requirements are met through multifaceted approaches. The middle management has to ensure that the curriculum is appropriately implemented. This could be achieved through mentoring and guiding educators (post level one teachers) in their day to day planning, teaching and assessing learners. Furthermore, appropriate implementation extends into working through the various implications of curriculum reform for their own subjects, assessment issues, working with new curriculum materials and textbooks, and understanding at a principled level what the essence of the reform is demanding. “Taking their lead from the principals, who can best discharge their leadership role if they develop a deep and broad knowledge base with respect to curriculum” (Glatton, 2000, p.3), heads of department have to develop a similar understanding for their own particular area of the curriculum.

Other than the above there is much that the literature reports about the middle managements’ roles in implementing the new curriculum in grades 10-12 level, as is discussed in the literature review section. For the purposes of my study, the school middle management of a school includes the principal, the deputy principal and heads of departments. These people in turn constitute the school management team (SMT). Referring to the international literature Revell (2005) points out that the basic activity of school is learning and teaching and the basic activity of managers is to enable other teachers to work as effectively as possible to plan and deliver the learning and teaching. He goes on to mention that the roles of middle managers encompass among others the ability to plan, identify and set targets in order to meet the aims and objectives of the subject as defined by the national curriculum. They have to recognize and utilize talents and expertise of others, they have to monitor and evaluate pupil and staff performance

against the aims and objectives of their department and the school at large. They have to ensure development planning in the subject. Moreover they must demonstrate their competency in these areas or at least be working towards them as part of their professional development. Furthermore in the same vein Gold (1998, p. 1) purports that “the role of middle manager combines subject expertise with an ability to bring out that knowledge in other people”. He makes mention also of the fact that they are seen as experts who manage the teaching and learning within a specialist subject hence they are regarded as knowledgeable in their subjects generally.

The Head of Department is specifically in a position of curriculum leadership. In fact Gold (1998, p. 1) points out that there are multifaceted reasons with regard to the appointment of middle managers to promotion posts. Among others Gold enumerates the seniority or status, subject knowledge, energy, particular interpersonal or teaching skills or it could be a combination of these and other reasons. Gold ends up by stating that the Heads of Department are promoted because they know a lot about learning and teaching in their subject. Busher and Harris (2000, p. viii) propound similar sentiments to Gold and Revell respectively. They regard middle management’s roles as to enthuse, monitor and develop staff and students’ performance, plan and sustain curriculum development, make appropriate resource allocations and represent the views of senior staff to their team colleagues. This is to mention but a few points with regard to what the literature says about the roles of the middle managers in implementing the new curriculum, as it will be mentioned later in the literature review section.

From a Eurocentric perspective Marland (1971) states that “the HOD is responsible for creating space, as it were, in which the subject can flourish, and that this ‘organisation’ is essential to produce the most effective, personal, and vigorous teaching of the subject to the best needs of the pupils” (p.3). Marland further points out that the HODs’ roles go beyond curriculum management to encompass the management of the team of teachers and their teaching. Their roles also encompass management of pupils, learning, teaching and support material (LTSM), student teachers, parents and the school (p.39). As much as Marland encapsulates the expected roles of the middle management in a Eurocentric perspective, in South Africa the implementation of the new curriculum poses numerous challenges. As far as the focus of this study is concerned, it is worth investigating the roles of the middle managers with regard to the implementation of the new curriculum in grades 10 – 12 level.

1.2 RATIONALE FOR THE STUDY AND KEY RESEARCH QUESTIONS

The Head of Department is a vital cog in the FET grades 10-12 level reform process. South African experience about the roles of the HODs in implementing the new curriculum is comparable to that reported in other literature of the world. Take for instance the Eurocentric literature from Marland and Hall (1981) which states that “it also remains true that there is a little help available to the prospective or actual holder of these posts” (p.1). In fact this was further enunciated by the recently held FET orientation workshops on the National Curriculum Statement (NCS). These workshops took place in 2006 and 2007. The workshops were conducted in the whole province of KwaZulu-Natal and in other provinces in the country as well. They were conducted by the National Department of Education working hand in hand with the Provincial Departments of Education. These workshops did not train HODs specifically in their level in implementing the new curriculum as they were meant for post level one teachers. Instead the HODs were trained generally as educators, probably on the assumption that HODs are also teachers. In fact the aforesaid remains a general assumption; it is the intent of this study to explore the actual roles of the HODs in the schools.

From a Eurocentric point of view, Marland and Hall also point out that “insufficient attention has been paid by researchers and students of educational administration, by providers of in-service training, and by those responsible for the career development in schools, to the needs of the Head of Department” (1981, p.1). This study aims to unravel this here in South Africa to find out what exactly is happening in the FET schools with regard to the roles of the middle management and how assessment is dealt with. Hence their roles need to be carefully explored. Their roles need to be carefully explored to encompass assessment. Assessment is one of the critical areas in the implementation of any curriculum. One of the key research questions of this study is to investigate how middle managers intertwine assessment in implementing the new curriculum? The Eurocentric point of view became apparent in the findings that intertwining assessment in implementing the new curriculum is a challenge at the school level.

The implementation process of the new curriculum, as various literatures on this subject put it; creates an enormous challenge to train educators, placing heavy strain on resources and finance. It is the purpose of this research to examine and identify the roles of the HODs in the grade 10-12 level with regard to the new curriculum implementation. The

literature in this study portray the roles of HODs as exciting and probably the most influential position in a well organised secondary school (Gold, 1998, p. 60).

Moreover, the rationale for this research is premised on the fact that the new curriculum implicitly requires the HODs to acquire and adopt new managerial and leadership strategies in their departments. The expertise they have in their specialised subjects is expected to expand to accommodate the developments in the new curriculum. It is the rationale behind this study to explore the roles of the HODs in implementing the new curriculum during this process of transformation. For transformation to take place in South Africa, the new curriculum needs to be implemented appropriately, hence the importance of investigating the roles middle management.

4. KEY RESEARCH QUESTIONS

The following three research questions guided this study:

1. What roles do middle managers play in implementing the curriculum?
2. How are middle managers responding to the current reform process at a Further Education and Training level?
3. How do they intertwine assessment in implementing the new curriculum?

The next chapter offers a review of the literature on the roles of middle managers in curriculum development processes in the schooling context.

CHAPTER 2

2 LITERATURE REVIEW

The literature pertinent to this study crosses a number of domains. In this literature review I focus on four areas relevant to the topic of my study. The areas that I review are firstly, the impact of curriculum changes in South African schools; secondly managing educational change and the re-articulation of roles in the teaching profession. Thirdly I explore the “real and the ideal” in policy the implementation process and finally look at the processes of leadership and management as essential to curriculum development in schools.

Furthermore the above-mentioned four themes are employed to unravel literature related to the middle managements’ roles in implementing the new curriculum at grade 10 – 12 levels. Literature related to this study has been drawn from the various readings of different modules of the degree. Moreover these four aforesaid themes have been identified to succinctly explain and put into perspective the issues related to the implementation of the new curriculum in grades 10 -12. They will highlight the rationale behind the successes and failures of middle managers in executing their roles. They will likewise epitomize the fact that curriculum implementation entails a myriad of issues.

In addition to the above, the aim of this literature review is to contextualize my research study and to uncover the giants of the field I am entering. Knowing the work of the giants afforded me the unique opportunity to stand on their shoulders as I began my journey as a novice researcher. Furthermore, I hope that my literature review will initiate debate around the topic and questions of the study. This debate will be further juxtaposed against and synthesized with my research findings later on in the dissertation. The exploration of the literature has certainly increased the knowledge of my subject area and provided the intellectual context for my work. Last but not least, the literature review has allowed me to position my study in relation to other work.

2.1 THE IMPACT OF CURRICULUM CHANGES IN SOUTH AFRICAN SCHOOLS

The aim of this section is to give the background to the origins of the new curriculum, hereafter referred to as the New Curriculum Statement (NCS) and the Outcomes Based Education (OBE). OBE is used as the conduit for implementing the NCS. Moreover my study highlights the impact brought about by the curriculum change. At this juncture it is worth mentioning that the advent of democracy and the demise of apartheid state education in 1994 saw the emergence of a new curriculum in South Africa known as Curriculum 2005. This was subsequently changed to the Revised National Curriculum Statement (RNCS) in the General Education and Training (GET) phase and National Curriculum Statement (NCS) grades 10- 12 in the Further Education and Training (FET) band. In fact these changes were necessitated by the adoption of the Constitution of the Republic of South Africa (Act 108 of 1996) which provided the bases for curriculum transformation and development in South Africa (Department of Education, 2003b, p. 1). Among other things that are enshrined in the preamble of the constitution of SA that provided the basis for curriculum transformation; is to heal the division of the past, improve the quality of life of all citizens and free the potential of each person; lay the foundation for a democratic and open society and lastly build a united democratic South Africa (Ibid, p. 1).

Although this study is not about the nitty-gritty of curriculum implementation in South Africa, it is of vital importance that I briefly outline the background in terms of positives and negatives it brought up so far. The study investigates middle management's roles in implementing the new curriculum.

2.1.1 Contextualising the Curriculum Change

According to Jansen (2002), the National Committee on Further Education developed the founding framework for the post apartheid further education and training curriculum. The report of this committee entitled, *Framework for the Transformation of Further education and Training*, called for the transformation of the education and training system to promote equity, redress, economic, competitiveness and quality learning. Notwithstanding, the White paper on Education and Training (1995) proposes the development of alternative curricula based on principles of access, redress, equity, credibility and efficiency. Fleisch (2002) critically espouses the points raised in the above paragraph. His thesis is that the post apartheid economy would be defined by rapid growth in high skilled jobs in all sectors. It is of cardinal importance, according to Fleisch, to develop policies in education that would ensure the full integration of education and training institutions. For him, by linking education with training, workers who had historically been denied access to social or job mobility would be in a position to gain new skills and knowledge (Fleisch, 2002, p. 119).

Jansen (1998) also purports the same notion about the need for curriculum change after 1994. He proclaims that since 1994 several curricula related reform initiatives, intended to democratise education and eliminate inequalities in the post apartheid education system, have been issued. He further makes mention of three national curriculum reform initiatives that have been introduced into schools. The first is an attempt to purge the apartheid curriculum of racially offensive and outdated content. The second is the introduction of continuous assessment whereby daily assessment will be done, particularly the informal assessment, and the third is an introduction of an outcome based education system (Jansen, 1998, p. 2).

The need for the curriculum change was indispensable after 1994 in South Africa. As Jansen puts it, “at first glance, there appears to be sound reasons for a curriculum policy modelled on OBE”. He premises his thesis on the fact that the “outcomes would displace an emphasis on content coverage, it will also make it explicit what learners should attend to, and it directs assessment towards specified goals” (Jansen, 1998, p. 2).

Lubisi (1998) elaborates on outcomes based assessment. He believes that learning, teaching and assessment are inextricably linked. In this new curriculum he purports that learners' progress will be measured against criteria that indicate attainment of learning outcomes rather than against other learners' performance. However as much as the new curriculum (NCS) and its approach will be ideal for the new dispensation, it poses various intricate challenges to different tiers of the education system within the school and outside the school context. This has also been advanced by Fleisch (2002) and Jansen (1998) in their writings respectively.

According to Fleisch (2002) the single biggest obstacle to this new curriculum and its implementation process was translating what was a highly abstract set of ideas into state policy and institutional practice. He goes on to highlight reservations and concerns expressed by individuals and organizations about the new curriculum. He centers these reservations on three themes, firstly there is too little capacity, secondly there is too little money and lastly there is too much jargon (p. 120). Capacity, according to Fleisch (2002), is essentially understood as a criticism of provincial training and poor training teachers received. He refers to poor training in the sense that the duration given was insufficient for educators to understand it. Davey (2006, p. 81) further enunciates that training was poor by stating that there was poor planning of the time frames which affected the success of the process. This is critical for the Heads of Department as they have to oversee the appropriate implementation of the curriculum. Thus it poses a double challenge for HODs as they are not fully capacitated with the nitty-gritty of the curriculum, and cannot therefore supervise and transfer new learning to their subordinates.

Under-funding for Fleisch (2002) signals everything from quantity of learning materials (learning and teaching support material) to the small physical size of many classrooms. Fleisch has cited various people and media in South Africa who espouse his point of view. Among others is Jansen (2002) who argues whether "OBE as curriculum innovation has not taken adequate account of the resource, status of the schools and classroom in South Africa" (p. 144). He, however, further points out that OBE will escalate the administrative burden at the very time that rationalization further limits the human resource capacity for managing the change. Moreover according to Jansen (2002), the Quarterly Review of

Education and Training in South Africa echoes similar sentiments about the paucity of resources and capacity. With regard to this review Jansen (2002) further points out the fact that “even if material inequalities were addressed in the most marginalized schools, many provinces are plagued with backlogs in teacher qualifications” (p. 145).

Jansen (1998) also levels criticisms in relation to the new curriculum and its OBE approach. His main concerns were the following four questions: Firstly do outcomes in fact deliver what they claim? Secondly, how do outcomes play out in a resource poor context? Thirdly, can outcomes survive their psychological roots in behaviourism? And lastly, do outcomes in different contexts mean the same thing? In support of these questions he postulates ten major reasons why OBE will have a negative impact upon South African schools. His view is that this policy is driven by political imperatives which have little to do with implementing the new curriculum as one of their chief roles (p. 2).

As to why OBE will fail, the following are the major reasons put forward by Jansen (2002). Firstly the language of innovation associated with OBE is too complex, confusing and at times contradictory. Although this reason was addressed in the RNCS and did not feature much in the NCS, the education system is still plagued with under-qualified educators. Secondly OBE is destined to fail in the South African education system because is based on a flawed assumption about what happens inside schools, how classrooms are organized and what kind of teachers exist within the system. This point could be further explained on the basis that most of our schools’ classrooms are overcrowded with insufficient space to appropriately practice OBE whilst simultaneously our schools are also plagued with unqualified educators. Thirdly the policy requires not merely the application of a skill, but an understanding of its theoretical underpinning and a demonstration of capacity to transfer such application and understanding across different contexts. Fourthly the management of OBE will multiply the administrative burden placed on teachers. Fifthly OBE requires trained and retrained teachers to be able to implement the new forms of assessment and classroom organization, which facilitates the complex process, constant monitoring and evaluation of the implementation process. Education managers need to be retrained as well to be able to manage the new

transformation in education. There is a lot to be said about the challenges of the new curriculum implementation. The HODs are faced with daunting tasks to implement this new curriculum despite all odds.

In as much as Jansen paints a bleak picture about the success of the new curriculum, De Clercq (1997) articulates similar sentiments with Fleisch where she points out that none of the school based educators were involved in the planning and restructuring of the curriculum. She further points out that “the new curriculum reform was led by the national bureaucrats who were responsible for drafting curriculum of the old regime” (p. 140). In addition Jansen (2002) postulates more or less the same sentiments as De Clercq when he talks about the “political symbolism as policy craft” (p. 199). He further asks what if the impressive policies designed to change apartheid education did not have implementation as their primary commitment? These assertions made by Jansen and De Clercq leave a lot to be desired on the part of the middle managers and the teachers per se. In fact the aforesaid necessitates the need for investigating the middle managements’ roles in implementing the new curriculum. The implication that could be deduced from the literature is that the roles of the middle managers in terms of curriculum implementation were not explicitly outlined.

Ramparsad (2001) agrees with the above statement and supports the view that there is a need for a formal in-service (INSERT) programme in order to facilitate widespread curriculum change. He goes on to say Education Policy decision making in 1994 was largely centralized and excluded educators. Despite the rhetoric of decentralization by the White Paper on Education, for him the present curriculum is effectively controlled from within a small locus and with hidden processes of decision making. Hence the extent to which teachers impacted on the curriculum development process is minimal and questionable (p. 287).

2.2 MANAGING EDUCATIONAL CHANGE AND THE RE-ARTICULATION OF ROLES IN THE TEACHING PROFESSION

One of middle management's roles in this new dispensation is to manage the current changes that are taking place in the education system. McLennan (2003) affirms that the National Department of Education (NDOE) had put initiatives in place to restructure South African education to be in line with the constitution. This, she argues, will help to expedite curriculum transformation to accommodate all races. She purports that the challenge facing the management is to strike harmony between the vision for transformation and the day-to-day realities for change to take effect in the education system.

Lumby (2003) links managing educational change with strategic change whereby the "strategic change can be identified by its large scale and its impact on culture" (p. 104). She however also put forward two main approaches to managing change; the collegial approach and the micro-political approach. The former advocates working together of different structures within and beyond the education system, taking all education stakeholders on board. However too much consultation, as Lumby puts it, procrastinates progress within the school system, making it difficult to expedite decision making even for minor things. The latter approach concerns hidden agendas within the system and the schools. Newton and Terrant (1992) in Lumby (2003) draw a relationship between the power of individuals and the degree of resistance they are likely to exert. They suggest that "people will resist positive innovation if to do so is their only or main influence over the system" Newton and Terrant 1992 in (Lumby, 2003, p. 107). This has been quoted by Lumby probably to accentuate the micro politics that could go on within the system. She also highlights this point to emphasise that "principals and teachers have consistently been at the receiving end of top-down management structure" (Lumby, 2003, p. 107), with a resulting long history of resistance to change. The relevance to this study of managing educational change and the prevailing style of top-down management structure cannot be overemphasized as South African school HODs also fall under the receiving end of a top-down management structure. This will be elaborated further in the section on policy and practice.

Furthermore managing educational change for the HODs at this juncture in South Africa must be very daunting. This is due to the fact that there are many issues that need to be taken into cognizance. The next section unravels issues related to the overwhelming phenomenon of educational change. Firstly it explores the context of educational change; secondly it investigates the perspectives on educational change as well as organisational culture and change and lastly it unpacks the notion of educators as change agents.

2.2.1 The Context of Educational Change

The context of educational change has a bearing in socio-economy, politics and educational contexts of school. Morrison (1998) in his work “Management theories for educational change” points out that change is inescapable; it is inbuilt into developing societies. In fact, according to him, “the aims, objectives, content, pedagogy, evaluation and direction of education are not fixed but fluid (p. 1)”. He raises some very intriguing points about managing educational change. This is analogous to the South African situation where change and transformation is taking place in an education system to meet the global and national challenges. In spite of the curriculum intricacies highlighted in the first part of this literature review, Morrison posits that changes in society are indispensable. The resonating point is the move from a modernist world to postmodernism. There are various elements of modernist society that prevail in the South African education schools, which are a challenge to the middle managers. These elements encompass, inter alia, hierarchy, bureaucracy, departments, demarcation, specialization, standardization, inflexibility with clearly defined strata of power, control and decision making (p. 2).

In counteracting the modernist world, postmodernism supports flatter management organizations, multi-functional and fluid teams, multi-skilling, team rewards, personal fulfilment and empowerment and trust in senior managers, it purports the growth of international capitalism, the supremacy of market mentality and market forces Morrison (1998, p. 2). Hence Morrison declares that change and reform in education are inescapable. For him education “as a significant component in socio-cultural and economic renewal and development is caught up in change” (1998, p. 3).

What has been said by Morrison typifies South African education schools and the education system at large. It is of pivotal importance that the HODs at a middle management level of the schools embrace curriculum transformation. Furthermore the point of embracing change and moving towards postmodernism has also been advocated implicitly by Tikly (2001) when he talks about globalisation and education in the postcolonial world. He uses globalisation theory to analyse contemporary international education policy. There are three approaches used to understand globalisation in low income, postcolonial countries, namely the hyperglobalist, sceptical and transformationalist approaches Tikly (2001, p. 153). All these approaches reiterate unprecedented levels of global interconnectedness. Globalisation as a theory sheds more light in understanding education policy in low income, postcolonial Countries. South Africa likewise is a postcolonial country; she is still trying to transform her education system. This theory highlights very intriguing points with regard to the response of countries like South Africa in the sub-Saharan Africa to globalisation. It highlights the challenge in economic, political and cultural factors. It also highlights the growing chasm between the 'haves' and 'have nots'. This is to say education transformation in South Africa is facing various challenges in terms of schooling, human resource, physical resource and financial resources.

Various criticisms have been levelled against the construct of the move towards postmodernism and globalisation especially in low income, postcolonial countries. Authors like Donald (1992) Usher and Edwards (1994) and Kress (1996) in Tikly (2001) have argued that global postmodernity has undermined the modernist goals of national education and of creating a natural culture (Tikly, 2001, p. 152). They further argue that the information superhighway and the new way that it interacts with global markets will lead to the demise of schooling and its traditional forms. South Africa can not afford to adopt policies from the first world countries like New Zealand and Australia and apply them because the contexts are disparate. The elements of the information superhighway are visible in the new curriculum, which, depending whether is rural or urban area in South Africa, are sometimes applicable and sometimes not.

2.2.2 Perspectives on Educational Change

The schools' middle managers have a daunting challenge in the quest for taking up roles in implementing the new curriculum of grade 10-12 level in the FET band. They have to cope with these intricate challenges of managing educational change at a macro level. In fact their roles demand more than just teaching and monitoring the implementation of the new curriculum. They require multifaceted perspectives on educational change. Among the perspectives middle managers can apply to schools in managing educational change are the structural perspective; humanistic perspective; political perspective and symbolic perspective (Dalin, 1998, p. 32). All these perspectives have their own tenets. They are of pivotal importance in implementing the new curriculum in South Africa. They empower all education practitioners, particularly the middle managers, to relinquish authority and embrace a collegial attitude. In fact it makes things easier for them because in their department they might be heading subject (s) other than their specialisations. In that case they can utilise the expertise of their subordinates.

The structuralist perspective insists on roles, rigidity and top down structure which were elements of the previous curriculum in South Africa, buttressed by the modernist point of view. Its basic tenets encompass classical organization theory by Weber, Fayol and Taylor (Dalin, 1998). They advocate hierarchical structure, specialisation, rule structure and impersonal relationships. In fact as much as the principle of this perspective belongs to the bygone era, as Dalin (1998) put it, its elements still prevail in the South African education system, particularly at the school level (Dalin, 1998, pp. 32-33).

The humanistic perspective is premised on the individual contribution to organizations and with an interaction between all organisations' members. According to Mayo, in Dalin (1998), employees are motivated by reward and promotion. Contrary to the first perspective, these characteristics feature very strongly in the new curriculum (Integrated Quality Management), which is also in line with the postmodernist point of view. In the new curriculum, educators are appraised through a programme known as the Integrated Quality Management System (IQMS) and receive incentives for being developed. This programme is divided into three areas; firstly is the appraisal system, secondly is the performance measurement and thirdly

is the evaluation measurement. These entire discrete programmes are integrated to form one which is done in two cycles during the school year. Nonetheless this perspective, according to some scholars, is premised on the unfounded grounds of human nature as it overlooks individual differences. It disregards power, structure and politics (Dalin, pp. 37-38).

The political perspective regards organisations as scenes of battle and conflicts of interests. According to Dalin (1998) it postulates coalition of individual and interest groups that results in contradictory goals. Moreover these result in power struggles to determine which goals are given priority. The political perspective argues that most decisions are based on the allocation of scarce resources. Hence conflict will remain central due to lack of resources (p. 40). This perspective has been heavily criticized for having little to teach about strategies for renewal except for reminding people about all the conflicts of interests and struggle for the distribution of power that exist (p. 42). Hence it is of critical importance that the middle managers keep abreast with the new development in education literature. Being conversant with the aforesaid perspectives, hopefully the middle managers could have an upper hand in managing the new curriculum.

2.3 THE REAL AND THE IDEAL IN IMPLEMENTING THE POLICY PROCESS

Literature consulted for this study testifies to the gap and the paucity of communication that prevails between research on practice and policy. The very nature of their (HODs) job or position forces them to ensure appropriate implementation of the curriculum. That is to say that out of the four distinct stages of the policy process, namely policy initiation, formulation, implementation and evaluation (De Clercq, 1997), the HODs fall in the critical stage of curriculum implementation.

According to De Clercq (1997), “policy implementation is the rational, technical, and administrative activity of a politically neutral bureaucracy whose action are directed at the achievement of the policy objectives or directives of the politicians” (p. 129). The linear sequential order of the different stages of the policy cycle has been heavily criticized. This stems from the debate about the relationship between policy formulation and implementation and between policy and practice. In fact, out of this

debate various approaches emanated. For example Elmore (1997) believes that “the best way to approach policy implementation is through the backward mapping approach” (p. 602). For him, backward mapping, “starts with the lowest level of the implementation process in order to generate the policy and establish a policy target at that level” (p. 602). This is to say that backward mapping as an analytic solution could be instrumental for the HODs because, as curriculum implementers, they will be empowered (p. 602).

In the same vein of argument McLaughlin (1987) posits three different generations that worked towards the best approaches to policy implementation basing this on the lesson from the field. Quoting his point of view, he makes mention of the rational man to point out that “implementers did not always do as told, as proponents of scientific did, they act to maximize policy objectives” (p. 172).

In a nutshell, according to McLaughlin “implementation dominates outcomes that is to say even the best supported and most promising policy initiatives depend finally on what happens as individuals throughout the policy system interpret and act on them”(1987, p. 173). This is to say that the roles of the HODs need to be carefully explored as they are in the critical stage of the policy process. In fact practicing the policy that has been formulated somewhere else is not easy. Hence appropriate training and explicit management’s roles need to be delineated.

Notwithstanding, McLaughlin (1987) highlights the fact that policy makers can not mandate what matters. He further points out that policy success depends on two broad factors namely the “local capacity and will”. In fact one can deduce from the given literature that policy and practice will remain elusive until pressure and support from policy are offered (p. 173). In addition, Fullan (1991) reiterates similar sentiments about the naïve assumption that involving some teachers on curriculum committees or in programme development would facilitate implementation, because it will increase acceptance by other teachers. He purports that “when the change was produced by fellow teachers, it was just as much externally experienced as if it had come from the university or the government” (Fullan, 1991, p. 127).

It is worth mentioning at this juncture, *inter alia*, that policies differ according to their purpose, complexity, target groups, distribution costs and benefits and location of

their impact (De Clercq, 1997). The different types of policies, De Clercq propounds, are substantive, procedural, material and symbolic (p. 128). Procedural policies are policies that spell out who is going to take action and through which mechanisms, whereas substantive policies reflect what the government should do. The material policies provide real resources to some interest groups.

This leads to the point made by Jansen (2002) that the curriculum policy and many other policies in South Africa were of political symbolism. He further asserts that “the making of education for the achievement of a broad political symbolism that would mark the shift from apartheid to post apartheid society”(p. 200). He however mentions that “we search in vain for logic in policy making connected to any serious intention to change the practice of education on the ground” (p. 200).

Contemplating what the literature is saying about the policy process and the relationship between policy and practice leaves the HODs or the SMTs at school with the challenge of what they can do or are doing to bridge the gap between the two (research and policy) policy issues. This prevailing gap necessitates the importance of investigating the middle managements’ roles in implementing the curriculum reform process. The roles of the middle managers require educators to discern the situation of the country and the curriculum reforms. For policy and practice to be linked appropriately in education of South Africa is not easy, not merely because of the intricacies associated with the curriculum but because the country is still plagued by under-qualified and unqualified educators. Moreover Fullan posits that “sometimes innovations are rationally sold on the basis of sound theory and principles, but they turn out not to be translatable into practice with the resources at the disposal of teachers” (1991, p. 128). He further says that “innovations are derived from what is rational to the promoters not to the teachers” (Fullan, 1991, p. 128). South Africa is also struggling with the issue of resources (LTSM, finance, human and physical) particularly in rural areas and township schools. The aforesaid pose challenges to the middle managers in these areas.

2.4 THE PROCESSES OF LEADERSHIP AND MANAGEMENT AS ESSENTIAL TO CURRICULUM DEVELOPMENT IN SCHOOLS

Investigating middle management's roles in implementing the new curriculum, the processes of leadership and management cannot be left out, as they are essential to curriculum development in schools. The concepts of leadership and management are generally intertwined as if they are one. It needs to be mentioned that the processes are at times done simultaneously, but they are not one. Davidoff and Lazarus (2002) explain how leadership and management are sometimes used interchangeably however they are quick to explain that the roles and purposes are not the same. For them leadership is essentially about "moving forward and having a sense of direction" (2002, p. 168) whilst on the other hand management is essentially about "holding the school, establishing certainty and confidence"(p. 169). They mention that the management function is about maintenance in order to ensure that things are operating smoothly and that structures are in place to support the forward movement and innovation of leadership.

According to Davidoff and Lazarus "leadership and management is multidimensional and requires ongoing work and commitment to the process of self understanding and of understanding others"(p. 168). In the same vein of argument Kotter (1990) argues that both leadership and management "involve deciding what need to be done, creating networks of people and relationships that can accomplish the agenda and then trying to ensure that those people actually get the job done"(p. 5). This resonates with the topic of this study, because the role of the middle management in implementing the curriculum is to work with the teachers whilst simultaneously managing the curriculum. The following core processes of modern management, as Kotter (1990) summarises them, explicitly distinguish management from leadership. The first one is planning and budgeting. In this process managers have to set target for the future and allocate resources to accomplish those plans. Second is organising and staffing. Managers in this case, according to Kotter, have to organise the structure to accomplish, plan and ensure that the posts are staffed with qualified individuals. Last but not least is controlling and problem solving (Kotter, 1990, p. 4).

Moreover the processes of leadership and management are linked to middle managers' roles of implementing the new curriculum. They are linked because

curriculum cannot merely be dealt with within the four walls of the classrooms.

The roles of the middle managers can be best explained if they are understood within a distributed leadership context which allows for teacher leadership to emerge. In the international literature Harris (2004) explores the extent to which distributed leadership can contribute to school improvement. According to her, "teacher leaders can help other teachers to embrace goals, to understand the changes that are needed to strengthen teaching and learning and to work towards improvement" (p. 13). This assertion Harris makes with regard to teacher leadership is of critical importance to the South African fledgling democracy, as Grant (2006, p. 511) puts it. Grant (2006) states, that "the concepts of teacher leadership and distributed leadership are implicit in current South African education policy documents" (p. 512). Her argument is based on policy document called the *Norms and Standards for Educators* (2000), which "envisages the educator as an extended professional who is expected to perform seven roles, amongst them that of leader, manager and administrator".

The international literature offers various overlapping definitions of teacher leadership. Muijs and Harris (2003) firstly define teacher leadership as an ability to encourage colleagues to change to do things they wouldn't ordinarily consider without the influence of the leaders. Secondly, they argue that teachers, who are leaders lead within and beyond the classroom, identify with and contribute to a community of teacher learners, leaders and influence others towards improved educational practice. Finally they contrast teacher leadership to traditional notions of leadership by characterising teacher leadership as a form of collective leadership in which teachers develop expertise by working collaboratively (p. 438).

The above mentioned definitions implicitly explain the new roles middle managers need to consider and adopt for the appropriate implementation of the new curriculum. According to Grant (2006) teacher leadership is required to transform schools into professional learning communities. This is to say that the structural roles and positions that are prevailing at school need to be blurred to allow, what the literature refers to as the "emergent property of a group or network of individuals in which group members pool their expertise" (Harris, 2004, p. 12). In fact the remarks of Grant and Harris are consistent with the South African policy document, *Norms and Standards for Educators* (2000), that accentuates numerous roles that educators are expected to play. Furthermore I argue that the middle manager should consider and

fulfil the four dimensions as listed by Muijs & Harris (2003). The first dimension concerns the transfer of school improvement principles into classroom practice. The second dimension encourages ownership of change and participative leadership. The third dimension conceives teacher leaders as important sources of expertise and information while the fourth includes “forging close relationships with individual teachers through which mutual learning takes place” (Muijs & Harris, 2003, p. 439).

It is of critical importance in South Africa that the school management teams / middle managers reconsider their traditional roles of serving as departmental heads or grade level chairpersons. They further need to reflect on planning and providing in-service training for others as well as their mentoring and curriculum development roles, to mention but a few. Fleisch (2002) mentions that there is too little capacity in the South African education system and that there is too much jargon used in the new curriculum (p.120). This spells out the urgent need for sharing of knowledge, dispersing of skills and leadership as well as the decentralising of roles within schools.

Grant (2006) also states that SASA (1996) promotes a shift from centralised control and decision making to school based system of educational management. She further argues that schools need to take a new look to transform themselves from hierarchically structured organisations into democratic organisations or learning organisations. That is to say, according to her, the previous understanding of leadership, during the era of apartheid where leadership was equated with headship, position, status and authority must be done away with (Grant, 2006, p. 512).

Investigating the middle management’s roles in implementing the new curriculum at grade 10 – 12 level, teacher leadership brings a new paradigm shift. The paradigm shift needs to be taken into consideration with regard to the prevailing leadership roles of middle management towards teacher leadership. This paradigm shift is advocated by Grant (2006) who argues that “the only way that schools will be able to meet the challenges is to tap the potential of all staff members and allow teachers to experience a sense of ownership and inclusivity and lead aspects of the change process” (p. 514).

In spite of the positive aspects of teacher leadership that could be gleaned through literature, there are inevitable and inherent difficulties associated with its wide spread adaptation within schools, particularly in South Africa. Grant (2006) states that the hierarchical school organisation controlled by autocratic principals as well as an understanding of leadership linked to a formal position both operate as obstacles to the development of teacher leadership in schools (p. 525). Furthermore, structural, cultural and micro political barriers operating within schools restrict teacher leadership (2004, p. 13). She further argues that schools are traditional and hierarchical with demarcations of position and pay scale. For the fact that promotion is done based mainly on experience or seniority, Grant (2006) shed light on teacher leadership which needs to be taken into cognisance by the people in the position of curriculum leadership as stated in the above paragraph.

In as much as there are striking similarities between the local and international literature, one would like to hear middle managers talking more about teacher leadership. Muijs and Harris (2003) state that distributed leadership assists in providing greater conceptual clarity to the concept of teacher leadership because it incorporates the activities of multiple groups of individuals in a school who work at guiding and mobilising staff in the instructional change process (p.440). This can be interpreted as the more teachers are given an opportunity to make decisions about their subjects, the better the knowledge and ideas needed in the implementation of the curriculum can be shared. This notion is espoused by Grant (2006) who suggests that “in keeping with the notion of distributed leadership, teachers need to be encouraged to find their voices; this requires a radical shift for schools from a dependency culture to one of empowerment” (Grant, 2006, p. 513).

In conclusion, let me briefly summarise a few key issues raised in this literature review chapter. The introduction of the new curriculum in South African schools heralded a change in the education system. The roles of education managers, as dictated by policy, changed to meet the new curriculum challenges. However, the gap between policy and practice was raised and discussed in the section on the “real and ideal” where the policy implementation process underpinning the new curriculum was critiqued. Regardless of the findings in this study, one can deduce from the assertions made by the giants in the field of research, that the processes of leadership and management are essential to curriculum development in schools. These essential

ingredients of leadership and management within the curriculum implementation and development processes lie at the foundation of my research. In the next chapter I present my own study, its research design and methodology.

CHAPTER 3

3. METHODOLOGY

3.1 AIM AND RESEARCH QUESTIONS

The aim of the study was to investigate middle management's roles in implementing the new curriculum, known as the National Curriculum Statement (NCS) at grades 10-12 level. For the purposes of this study, middle management in the school system refers to the Principal (head of the school), the Deputy Principal and the Heads of Department. All these people in these portfolios assist the principal in the leadership and management of the school. The advent of democracy and the demise of the apartheid state education in 1994, which saw the emergence of the new curriculum, brought with it numerous challenges to the education system of South Africa as mentioned in the previous chapter. It was the intention of this study to address the following research questions: Firstly, what roles do middle managers play in implementing the curriculum? Secondly, how are middle managers responding to the current reform process at a Further Education and Training level? And thirdly, how do they intertwine assessment in implementing the new curriculum?

This chapter focuses attention on the methodological process I chose in order to generate and analyse data. Numerous researchers in this field of research like Naidoo (2006, p. 64) refer to methodology as a description and analysis of methods chosen, of their limitations and resources, of clarifying their presuppositions and consequences. While on the other hand Henning (2004, p. 36) refers to methodology as the coherent group of methods that complement one another and that have the "goodness of fit" to deliver data and findings that will reflect the research question and suit the research purpose. In the same vein Naidoo (2006) mentions that 'methods' are a range of approaches and techniques used to gather data to be the basis of description, inference, interpretation, explanation and prediction. According to Henning (2004) if methods have been blended together well, they are able to render a thick description of the theme of the study and thick description of the methodology itself.

3.2 RESEARCH PARADIGM

The study employed a qualitative research design which was underpinned by the interpretivist theoretical framework as its epistemological home. At this juncture it is worth defining qualitative research before elaborating on the interpretivist theoretical framework. Henning defines the qualitative paradigm as:

A research form, approach or strategy that allows for a different view of the theme that is studied and which the respondents (referred to as participants by most qualitative researchers) have a more open-ended way of giving their views and demonstrating their actions (2004, p. 5).

Qualitative research suited my study because the research topic dealt with investigating the roles of middle management in implementing the new curriculum at grades 10-12 level. Naidoo (2006) lists the characteristics of qualitative research. She says firstly qualitative research is essentially concerned with looking at events, processes, values and actions from the perspective of those being studied. Secondly, it is concerned with describing and analysing the social settings in which those being studied are located as a means of holistically contextualizing research results. Thirdly, qualitative research involves the spending of enough time in settings in order to gain insights into social events and processes. For her, qualitative research is inherently multi-method in focus. For this study its utilization is an attempt to come in from different angles (triangulation) to secure a valid and reliable in-depth understanding of the research problem (Naidoo, 2006, p. 66).

The interpretivist theoretical framework was also used to frame this study. This theoretical framework is in concord with qualitative research methodology as the theory that underpins qualitative inquiry. An interpretivist research paradigm is primarily concerned with meaning and seeks to understand social members' definitions and understanding of situations. It accentuates the importance of experience and interpretation (Henning, 2004, p.21). Moreover Davey (2006, p. 36), in her work, expresses similar sentiments that this paradigm describes meaningful social action through direct, detailed observation of people in order to arrive at understandings and interpretations of how people create and maintain their social world. On the other hand

Denzin and Lincoln (2003) make mention of the researcher who becomes a bricoleur when conducting qualitative research. The concept bricoleur refers to a wide range of interconnected methods the researcher employs to get a better comprehension of the subject matter at hand.

Furthermore the sentiments expressed by Denzin and Lincoln (2003), Davey (2006) and Henning (2004) have further been advocated by Naidoo (2006, p. 68) when she argues that to understand the meaning of human action requires grasping the subjective consciousness or intent of the actor, and from the inside. She however makes mention that “an empathic identification with the actor is required” – She further argues that understanding the meaning of human action “is an act of psychological enactment getting inside the head of an actor to understand what she or he is up to in terms of motives, beliefs, desires, thoughts and so on”(Naidoo, 2006, p. 68).

In addition to the above, Henning (2004) propounds six fundamental assumptions that underpin the interpretive paradigm. Firstly individuals are not considered to be passive vehicles in social, political and historical affairs, but have certain inner capabilities which can allow for individual judgments, perceptions and decision-making autonomy. Secondly, is the belief that any event or action is explainable in terms of multiple interacting factors, event and processes (in other words, causes and effects are mutually interdependent). Thirdly, there is an acceptance of the extreme difficulty in attaining complete objectivity, especially in observing human subjects who confuse and make sense of events based on their individual cases, rather than universal laws or predictive generalizations. This does not mean that the findings cannot be extended logically and used in some way; otherwise the purpose of the research would be questionable. Fourthly, is the view that the world is made-up of multifaceted realities that are best studied as a whole, recognizing the significance of the context in which experience occurs. Lastly, there is the recognition that inquiry is always value-laden and that such values inevitably influence the framing, focusing and conducting of research. My study attempted to engage the participants in a way that respected their inner capabilities. This was done by probing their individual judgement, perception and decision making with regard to their roles in implementing the new curriculum. It goes without saying that every educator has his or her own judgement when it comes to the delivery of the curriculum and this was implicit in my study. This resonated well with the research questions. Moreover, it was also a tacit intention of my study to figure out from the

middle managers if there were alterations in terms of their own curriculum implementation.

In as much as this framework suited the topic of this research study, it complemented and has a “good fit” with the qualitative research design. It sought to allow for a different view of the theme and allowed the respondents a more open-ended way of giving their views and demonstrating their actions in their natural setting (Henning, 2004, p. 5). The qualitative inquiry together with the interpretivist approach generally utilize interviews, questionnaires and document for analysis as well as other methods of data gathering.

According to Henning (2004) an interpretivist framework has its own weaknesses. As it is based on everyday knowledge that drives the society, also known as its discourses, its reasoning might not always be a careful process. She points out that an interpretivist researcher realizes that observation is fallible and has error and that all theory is revisable. In fact my study took cognisance of that as it was also based on everyday knowledge that drives our schools and society. It is worth acknowledging the fact that it might not always be a careful process. For me to minimise the weaknesses of this framework, different methods of collecting data were employed. As mentioned earlier interviews, questionnaires and data analysis were used. These methods elicited data from different angles. This process of eliciting data from different angles, Henning (2004) refers to as triangulation. Data obtained from using different methods adds to the trustworthiness of the study, especially if it also comes from different people occupying different posts in the management structure within a school.

3.3 RESEARCH DESIGN AND METHODOLOGY

3.3.1 Selection of schools

The research sites for this study involved two combined schools. In this regard a combined school is a school that has both the General Education and Training phases (GET) and the Further Education and Training phase (FET). The two schools were situated in the Midlands Circuit of KwaZulu-Natal. The schools each have a learner population of about 500 from grade 1 to grade 12. The actual areas are rural with sparsely populated homesteads to peri-urban in the midlands meander section of KwaZulu-Natal. The age of learners ranges between 6 and 20 years old. The school types differ according to the South African Schools Act (SASA): one of the schools is a Section 21 school while the other is a Section 20 school. The difference between the two is that in the Section 20

school, procurement is done by the Department of Education. According to the South African Schools Act (SASA) (1996) a governing body of a public school must prepare a budget each year according to prescriptions determined by the Member of the Executive Council. Then the school will be sanctioned to make requisition for the stationery or any other teaching material. In fact these are “schools that have therefore not been granted approval to procure their own goods and services....”(SASA, 1996, p. 18) while Section 21 schools manage their funds through their governing bodies. Moreover section 110 of the SASA stipulates that, “school governing bodies that are on the section 21 list may deal directly with the suppliers and contractors for the relevant budgeted items in accordance with standard procurement procedures”(SASA, 1996, p. 53).

Both schools in the study experienced poor sanitation as well as a lack of transport for commuting learners. The learners relied on the private motor vehicle, “the Bakkie”, to get to and from home. Learners residing nearby the schools used bicycles while others walked. Hitch hiking was also very prevalent in the area. Nevertheless the road itself was in a mediocre state due to many trucks that used it as an alternative route to the national free way (N3). The two study schools are located on the same route and are about 10 kilometres apart; both are electrified and the buildings are in a good state according to schools’ deciles. One could mention that using deciles by the Department of Education to rank schools is not invariably the best way to rank schools. This is due to the fact that other schools could be in rural areas serving poor communities yet their buildings are good. The reason for choosing these two schools was that they offered the FET band, grades 10 -12 which was my area of specialization and research interest. Furthermore the schools were conveniently situated near my school which allowed me easy access for my study.

3.3.2 Access and selection of participants

As mentioned in an earlier chapter, the participants in this study included four middle managers from two schools in the midlands of KwaZulu-Natal, each of whom had a lot of experience accrued, being at the schools for a good length of time. Their learning area specializations included Life Sciences, Physical Sciences, Geography and isiZulu. Due to the low school enrolment’s in the area the schools did not have a fully fledged management structure; their management structure included a Science Head of Department, a Commerce Head of Department and a Languages and Humanities Head of

Department. In the same vein, the low school enrolment created a situation whereby an HOD headed three to four subjects or learning areas beyond his specialization in his department. Participants were firstly given information verbally about the aims of the study and subsequently issued with a formal letter. To reiterate, the aim of the study was to investigate the roles of middle managers in implementing the new curriculum at the FET phase. Accessing the schools at this stage was possible, due to the fact that they were just a stone's throw from my school – convenience sampling. The School Management Teams were selected using purposive sampling. A discrepancy worth mentioning at this stage was the allocation of resources (human, physical and financial) between schools in traditionally urban areas and those in the rural areas in South Africa during the apartheid era which were not allocated equally. This is further substantiated in SASA (p. 45) in section 46: “ironically, given the emphasis on redress and equity, the funding provisions of the Act appear to have worked thus far to the advantage of public schools patronised by middle-class and wealthy parents”. Last but not least, from my first engagement with the participants, I was careful to ensure that I proceeded in a highly ethical manner. Ethical clearance was granted to me by the University of KwaZulu-Natal to embark on my study and participants were aware of their rights as participants and I was careful to ensure their anonymity during the data collection and analysis processes.

3.3.3 Methods of data collection

Qualitative research has a variety of methods used to collect data. These data collection methods encompass observation, interviewing, documents and artefacts, life story, questionnaires and many others. My study employed questionnaires, interviews and document analysis as mentioned earlier in this dissertation. These methods were suited to the interpretivist theoretical framework. It was hoped that triangulating them would be able to render a thick description of the roles of the middle managers in the study.

3.3.3.1 Questionnaires

Questionnaires as devices are used to collect data and they allow respondents to directly supply their answers to a set of questions. They also ring the alarm bells about the “nature of questions the interviewer will ask which will determine the respondents’ answers” (2005, p. 24). I used open ended questionnaires in this study to gather professional biographical data related to middle managers’ careers. All four middle managers participated in filling in questionnaires willingly and questionnaires were returned. I used

questionnaires as Cohen et al (2007) point out that they tend to be more reliable because they are anonymous and they encourage greater honesty.

3.3.3.2 Interviews

The interviews were held at the school after hours, meaning from 14h00 onwards. All interviews were open ended allowing the participants to express their views. I used a digital audio recorder to record each interview. The digital recorder afforded me time to listen to the interviewee attentively so as to be able to probe their responses. Moreover it enabled me to engage fully with the interviewee because I did not have to write everything down. More than that, after each interview all the data captured was transferred to the computer system during the data transcription process.

The aim of employing interviews as a data collecting methods is to get an individual's (middle managers) perspective about the roles they play in implementing the new curriculum in grade 10 -12 levels. Henning (2004, p. 50) postulates that "individual's perspective is an important part of the fabric of society and of our joint knowledge of social processes and of the human condition". She makes an example about the earlier times where individuals, and especially ordinary folk who were not heads of tribes or churches, were not viewed as being able to give a meaningful or purposeful expression of their experience or views. She mentions however that, "with the emergence of this individualising discourse came the communicative event known as the interview" (Henning, 2004, p. 51). This is the same reason I employed the interview method because I wanted to hear the voices of middle managers with regard to the roles they played in implementing the new curriculum. Interviews were the main data collecting method for this study. Cohen et al (2007, p. 349) defines interviews as "an interchange of views between two or more people on a topic of mutual interest, which sees the centrality of human interaction for knowledge production". They further point out that the use of it in research marks a move away from seeing human subjects as simply manipulable and data as somehow external to individuals. Instead it represents a move toward regarding knowledge as generated between humans, often through conversation.

It is the same rationale my study employed in adopting interviews. It was to go beyond the surface level of information with the respondent to elicit knowledge of how they personally implemented the new curriculum in their own unique context. This was executed through semi-structured interviews. Le Compte (1999, p. 149) describes that in

semi-structured interviews questions are pre-formulated, but answers to those questions are open ended, they can be fully expanded at the discretion of the interviewer and the interviewee, and can be enhanced by probes. For De Jager (2005), the semi-structured interview involves a series of open ended questions based on the topic areas the researcher wants to cover. Furthermore semi-structured interviews, according to De Jager (2005, p. 57) provides opportunities for both interviewer and interviewee to discuss some topics in more detail. She further states that the researcher is free to modify the sequence of questions, change the wording, explain them or add to them. It allows for greater depth in that contact with the interviewee occurs in an interpersonal environment. It was true for me that during the process of conducting interviews, I had more latitude to explore issues in detail - more than I initially structured on the interview schedule.

In addition, similar sentiments have been expressed by Cohen et al (2007). They purport that interviews are not simply concerned with collecting data in life: it is part of life itself; it is embedded in what it means to be human –its humanness is inescapable. Nevertheless interviews as a data collecting method do not go without any criticism levelled against them. It has been further pointed-out that they are expensive in time, they are open to interviewer bias, inconvenient to respondents and anonymity may be difficult. Cohen et al (2007) go on to mention that an interview is a constructed rather than a naturally occurring situation. This was so in my research; I had to consciously plan and set up the interviews and construct the interview schedule. At the end of the interview process, the documents middle managers used in supervising teachers' work was requested to further explore their roles as subject specialists in implementing the new curriculum. The next section will explore the importance of documentary analysis.

3.3.3.3 Documentary analysis

It is learnt from documentary research literature that there are copious documentary sources of data in research. Cohen et al (p. 201) caution us on their usage. They say in as much as these sources form part of the everyday world of the participants, in other cultures it may be less so. They further purport that these sources are out there for different reasons: “while some documents may have been written deliberately for research, most have not” (p.201). Indeed most have been written for a purpose, agenda, or audience other than researchers and this raises questions about their reliability and validity. Cohen et al (2007) states that “documents take a multitude of forms, including

for example: field notes, diaries and journal, formal records, time tables, minutes of the meetings, sample of students' work, reports and statistics, correspondence plan, policy documents and so forth, to mention but a few”(Cohen et al., 2007, p. 201). Similar documents have been considered in this study in the quest to analyse the documents of the participants. These documents shed more light on how the middle managers executed their role of implementing the new curriculum. They further assisted me in consolidating the data acquired during the interview process. They afford me the opportunity to verify the interview data.

Moreover Cohen et al (2007) put forward the following reasons about the importance of documentary analysis. They purport that documentary analysis can enable the researcher to reach inaccessible persons or subjects. Further, they have little or no reactivity on the part of the writer, particularly if the document was not written with the intention of being research data. Documents written live and in situ may catch the dynamic situation at the time of writing. Cohen et al (2007) also mention difficulties that these documents may have for example they may be highly biased and selective, as they were not intended to be regarded as research data, but were written for a different purpose, audience and context.

The aim of documentary analysis in my study was to try to understand precisely the roles of the middle managers in implementing the new curriculum and also to figure out what the documents from the National Department of Education were saying about middle management's curriculum roles. Documentary analysis also aided me in ascertaining how middle managers compiled their records in an endeavour to execute their roles. Among the documents analysed in my study were the following:

- Formal records which helped with finding out the kind of textbooks used as well as the design of subject frameworks, work schedules, lesson plans, assessment plans and mark sheets.
- Time tables which encompassed subjects in the FET phase and the times that were allocated per subject according to Departmental requirements of the National Policy Regarding Further Education and Training Programmes Policy for the National Senior Certificate (NCS). Chapter four of this policy states that the contact time for teaching NCS Grades 10-12 (General) for Grades 10, 11 and 12 will be 27,5 hours per

week, excluding the time allocated to breaks, assemblies and extramural activities”(Department of Education, 2005b, p. 16). Analysing the time table was of vital importance in this study because the role or the duties and responsibilities of the middle manager as prescribed in the Employment of Educators Act 76 of 1998 included among other things time tabling (Employment of Educators Act 76 of 1998, 2003a, p. 67).

- Departmental minutes of the meetings were helpful with personal details and feelings about how the teachers in the department executed their duties. Samples of students’ work and portfolios helped with the evidence of work being done towards achieving learning outcomes. Policy documents assisted in findings out what the National Department of Education (NDOE) was expecting about the implementation of the new curriculum.

The issue of validity and reliability in the foregoing documents (time table, minutes, portfolios and policy documents) were taken into cognizance. Cohen et al (2007, p. 203) postulates that “validity may be strong in first person documents or in documents that were written for a specific purpose”. In this study minutes of meetings, time tables and learners’ work held strong validity. Cohen et al (2007) further purport that bias, selectivity being written for an audience and purposes different from those of the researcher, attrition and selective survival, all these undermine validity. This is to say that different documents are written for different purposes. Consequently as a researcher I need to be careful in using them for research. Their essence must not be compromised to meet my own needs at the expense of their fundamental nature. In my study validity was maintained by comparing different documents, for example the time table with policy documents. Comparing the time table with the policy document, assisted in ascertaining the allocation of time for the teaching period, whether the 27.5 hours in the FET band is distributed accordingly for all subjects in the school curriculum.

It is true that subjectivity features highly in certain documents. My analysis of the meeting and learners’ work books could not capture the prevailing mood, comprehension and competencies of the teachers and learners at the time of these activities. To maintain trustworthiness I employed four criteria suggested by Cohen et al (2007, p. 203): that of authenticity, credibility (including accuracy, legitimacy and sincerity), representativeness (including availability and which documents have survived the passage of time) and

meaning (actual and interpreted). Furthermore authenticity and credibility were maintained by analysing the educator's documents that they designed themselves against policy documents; in other words documents that were contemporary and recommended by the Department of Education. This worked on the premise that if teacher documents were based on the departmental policies that meant their work had authenticity and credibility. Document analysis as one of the method of collecting data if considered appropriately and thoroughly examined, they yield strong evidence of what is actually happening in reality. It is worthwhile at this juncture to give some background on how the data was transcribed from the oral discourse to a written discourse.

3.3.4 Transcribing

The qualitative content analysis method explains how transcribing was done. Kvale (1996) defines transcripts as a transgression, or transformation of one narrative mode - oral discourse into another narrative mode – written discourse. In this study it was done from a digital voice recorder connected to a computer. All the data recorded during the interviews were downloaded to the computer and the computer enabled me to move in between the conversation in trying to hear the respondents' pronunciation.

(Kvale 1996) regards the transcribed written text as solid empirical data. The written texts (transcripts) were given to the respondents (middle managers) for the purpose of a qualified reliability check. Although Kvale casts aspersions on the validity and authenticity of transcripts, he postulates that “transcripts are decontextualised conversations” (pp. 164-165). That is to say that transcripts are not copies or representations of some original reality, they are interpretive constructions that are useful tools for given purposes. For him they are analogous to topographical maps. According to him, these maps are abstractions from the original landscape from which they are derived. They accentuate certain aspects of the country and omit others. They select features depending on the intended use (ibid, 164-165).

The same could be inferred from the transcription processes that were done in my study. The original landscape (interviews) were transcribed and analysed to delineate middle managements' roles in implementing the new curriculum, as this was the chief objective in conducting the study. Hence they can be referred to as decontextualised conversations; because in the process of being transcribed, the essence of authenticity might have been

lost. In my study as well, the authenticity of the oral conversations with the middle managers might also have been lost. This was due to the fact that the transcripts were reduced and condensed under qualitative content analysis as the method used to make meaning of data. For example sighing, pauses and laughter happened during the interview were not encompassed in the written text. These omissions at the end of the day, could support Kvale's (1996) view that transcripts accentuate certain aspects of the original conversation and omit others as the topographical map does. This has been minimised in this study through the utilisation of a digital voice recorder which assisted me to go back and forth to listen to each and every word and action the participants was doing at the time.

Kvale (1996) and Cohen, Manion, & Morrison (2007) respectively point out that there are several stages or approaches in data analysis namely, categorisation of information, meaning condensation, structuring of meaning through narratives, interpretation of meaning and ad-hoc methods for generating meaning. Only the categorisation of meaning is chosen and elaborated on for the purposes of this study. I found it more amenable with this study because it was like the content analysis that works on one level of meaning that is the content of data texts. In as much as these stages are underpinned by positivist tone as Cohen et al (2007, p. 369) put it, "it is a useful way of moving from the specific to the general in data analysis" (inductive reasoning). Content analysis and meaning categorisation resonates fairly well whereby the process of categorisation of data operates in tandem with coding.

Furthermore Neuman (2000) defined codes as "tags or labels for assigning units of meaning to the descriptive or inferential information compiled during the study", whereas Cohen et al (2007) define it as the translation of question responses and respondents information to specific categories for the purposes of analysis. Moreover Neuman (2000) goes on to mention three kinds of qualitative data coding namely, the open coding, axial coding and selective coding. It was not the aim of this study to deliberate on them all, only the open coding is dealt with in detail as it was utilized during the analysis process. "Open coding" is performed during the first phase with recently collected data. The text is coded by means of meaning units. According to Neuman during this process themes are brought to the surface from deep inside the data. One would concur with Neuman because during this first phase everything remains at a low level of abstraction.

What was apparent during the open coding process of the data in my study was the cropping up of new concepts and terminology. The concepts and terminology used by the respondents had to be defined in one way or another but the meaning had to remain intact. Babbie (2002) refers to this kind of language as “semiotics”. He defines semiotics as the “science of signs” that is to say giving the underlying meaning to the terminology used by the participants. In fact during the process of coding, working around the language participants used was a challenge, because I had to dig deep and go beyond the obvious explanation. In the process of transcending the obvious explanation I had to keep the essence of the conversation that happened between me and the respondent. This was done by checking with the respondent and using the transcribed words (quotations) as they were in the analysis process. This was particularly evident in the sections of the roles of the middle management as well as the policy and the reality with regard to the new curriculum implementation.

In the same vein of discussing semiotics, I saw it fit in this study to include various quotations from the respondents during the interpretation process. These quotations held the essence of the language used by the respondent to verify and ensure the authenticity of the data collected. It was also meant to preserve meaning as the oral discourse was transferred to written discourse. In fact with regard to transforming discourse from one mode to another Kvale (1996, p. 166) cast aspersions that “it produce hybrid artificial constructs that are adequate to neither the lived oral conversation nor the formal style of written texts”(p. 166). That is to say as Kvale (1996) asserts, the hybrid artificial construct has manifested itself whilst transcribing data. The exact morphemes from the respondents have been encompassed to ensure authenticity as said above. “The different rhetorical forms of oral and written language are frequently overlooked during the transcription” of interviews (Kvale, 1996, p. 166). Thus exact quotations from the respondents were essential to make the middle manager’s life world situational, empathic and participatory as opposed to just basing analysis on written text which I said in the preamble was the theoretical text.

De Jager (2005, p. 64) explicitly reiterates the difficulty one could experience during the process of “decontextualisation”. She refers to decontextualisation as an “act of separating data extracts from their original context while retaining meaning”. I concur with her. The challenge was in summarizing data into meaningful units. It was tricky in the sense that it needed time and was very challenging. It was challenging because it was

tricky to keep anonymity of the respondent due to the fact that transcription had to be transformed from units into a written discourse and respondent terminology given meaning.

To sum up the transcribing process Cohen et al (2007, p. 365) throw in a word of caution that during this process “there is the potential for massive data loss, distortion and the reduction of complexity”(p. 365). Indeed it was a fact that my task was to endeavour to minimize these potentialities. I also concur with them that transcription omits the element of social encounter and focus on records of data. In fact by doing that it filters out important contextual factors, neglecting the visual and non verbal aspects of the interview. In addition one should concede that these potential omissions (i.e. social encounters and facial expressions) during the process of transcribing are inevitable, but can be minimized. The work of Denzin et al (2003, p. 355) testifies that “the idea of completeness may itself be an illusion; surely, there cannot be totally complete data anymore than there can be a perfect transcript”. These utterances came about when questions of “leaving out things like facial expressions” were asked. In my study transcription was done by me as an interviewer. The digital voice recorder was replayed and replayed to try to capture the precise words used by the respondents. In fact more than capturing the precise words, I shared their perception of the world of curriculum implementation through their utterances. In doing this, it gave me an edge to be close to the real situation. The digital voice recorder connected to a computer as mentioned in the research design ensured accuracy of transcribing and interpretation.

3.4 DATA ANALYSIS

The process of converting “raw” data to final patterns of meaning began by transferring all data collected from the questionnaire forms and interview digital voice recorder to the computer system for manual transcription. From the computer system, I printed and read across all questions and interviews, logging similarities and differences, identifying patterns, constructing thematic statements and writing grounded descriptions of participants. For my analysis I employed the grounded theory analysis. That is to say, I pursued the qualitative coding and categorizing route. The grounded theory analysis accentuates dividing data into small units of meaning which are then systematically “named” per unit (coded according to what a unit of meaning signifies for the researcher) and then grouped together in categories that contain related codes (Henning, 2004, pp.

101-102). I prefer this qualitative content analysis theory because it works with one level of meaning – the content of the data texts (Henning, 2004).

3.5 RESEARCH CHALLENGES

In conducting this research study there were challenges I encountered like the lack of experience in conducting research. Naidoo (2006) in her words encapsulates these challenges well. For her there are three challenges; she refers to them as constraints. These are sociological, methodological and ontological. They prevent researchers from producing true knowledge. By sociological constraints she refers to the shortcomings that originate within the researcher. This according to her might involve lack of knowledge about the object of the inquiry, lack of training in research processes, lack of experience in conducting research, strong prejudices that might bias the interpretation of data and poor judgement about various decisions in the research process. I also somehow fell victim of the above, but I managed to avert it with the assistance of my supervisors and by reading a lot of literature pertinent to research. I also tried to be unbiased by not letting my prejudices cloud my interpretations.

Ontological constraints refer to the features of the “objects of study” according to (Naidoo, 2006, p. 73). She goes on to say “the fact that human beings are the objects of inquiry in social research creates problems that are not encountered in the physical sciences. Human beings normally react to the fact that they are studied and investigated, the participants in social research are aware that they are being investigated and tend to react to this by adapting their behaviour”. According to her this phenomenon has been known as reactivity. This reactivity manifests itself in a variety of forms – resistance to being interviewed or observed, supplying incorrect information as a result of apathy or wilfulness, modifying behaviour or information to create a better impression or deliberately misinforming the researcher. If the reactivity is not controlled or minimized by the researcher then the data collected will not be reliable. In trying to minimize reactivity I used three different data sources; questionnaires, interviews and document analysis. The data was collected on different days from different participants.

The reliability concepts come in at this stage as a criterion for collecting data. Reliability pertains to the consistency of the research findings (Kvale, 1996). It is mainly concerned with whether the research results can be replicated by other researchers using the same

methods (LeCompte et al., 1999). The objective of employing different data collection methods is to yield reliable data. Hence questionnaires, interviews and documentary analysis were chosen for triangulation purposes and not for the mere fact that there was a goodness of fit with the qualitative research design and theory.

A methodological constraint according to Naidoo (2006) refers to the use of appropriate methods and techniques that ignore the limitations of a particular approach or instrument. Conducting interviews and later looking at the documents middle managers used to teach and monitor or supervise educators' work made me realize that the methods I used were up to the task, despite the fact that, as a novice researcher, I could not employ the techniques to their maximum. Attempts have been made to overcome the challenges and present truthful data as it was experienced on site.

In the next chapter, I present and discuss the findings of the study.

CHAPTER 4

4. PRESENTATION AND DISCUSSION OF FINDINGS

4.1 FINDINGS

This chapter merges the two texts, the empirical text and the theoretical text. This is done by presenting and interpreting various themes and findings which emerged from data collected using semi structured interviews, questionnaires and documents analysis. The usage of these three different data collecting methods was to add trustworthiness to the study and reduce bias. To reiterate, qualitative content analysis as advocated by Henning (2004), Babbie (2002) and Neuman (2000) was employed as part of the data analysis process.

The aim of this chapter is to present the major themes which emerged from the findings of my study. It presents and discusses the findings according to the following topics: curriculum implementation and its challenges; the diverse understanding of middle managements' roles in implementing the new curriculum (NCS) at the FET band; designing the learning programme (LP) as the tool for planning in implementing the curriculum; integration as one role in implementing the curriculum; assessment and management of educational change as a role in ensuring appropriate implementation of the curriculum; resources as indispensable to curriculum implementation; further curriculum implementation challenges and procedures and documents for management – policy and practice.

4.2 CURRICULUM IMPLEMENTATION AND ITS CHALLENGES

In discussing curriculum implementation and its challenges, Jansen (1998) highlights the need for curriculum change so indispensable after 1994 in South Africa. He premises his thesis on the fact that education had to be democratized to eliminate inequalities in the post apartheid education system. He goes on to say that the new curriculum will be based on outcomes that would displace an emphasis on content coverage, it will likewise be explicit what learners should attend to and it directs assessment towards specified goals.

The foregoing has further been expressed by Lubisi et al (1998) when they argue, in relation to this new curriculum, that learners' progress will be measured against criteria that indicate attainment of learning outcomes rather than against other learners' performance. In this note they distinguished between the old and the new differently referenced assessment types, namely norm referenced and criterion referenced. Norm referenced assessment is done by comparing a learners' performance with the performance of others, or with a typical performance of that learner, whereas criterion referenced measures the performance against pre-determined and agreed criteria (expectations). Furthermore among the challenges the literature reveals are the translation of what is highly abstract set of ideas into state policy and institutional practice. According to Fleisch (2002) other curriculum challenges encompass too little capacity, too little money and too much jargon.

4.3 THE DIVERSE UNDERSTANDINGS OF MIDDLE MANAGERMENTS' ROLES IN IMPLEMENTING THE NEW CURRICULUM (NCS) AT THE FET BAND.

The findings in my study delineated that the middle managers in each of the two schools had more or less similar points of view with regard to their roles at schools in implementing the new curriculum (NCS) in grades 10-12 level. In as much as their points of view among themselves were similar, there was an extent to which they were different from the literature reviewed in Chapter Two of this dissertation. The following discussion elaborates their points of view.

4.3.1 Roles in Implementing the New Curriculum.

Findings revealed that the roles of middle managers encompassed implementing and managing the curriculum according to the departmental policies. Their role was to ensure that educators covered the learning outcomes and assessment standards according to the policy documents. The following comments made by the middle managers illustrate this point:

The role of the HOD is just to see to it that now the curriculum is implemented according to the departmental policies to ensure that all the resources are available also for the teachers in order to be able to implement the curriculum.

The following comment further reiterates the point of how HODs ensure the implementation of the curriculum:

To monitor their work I just, ah, there is a schedule that I used to. The educators have to submit their work books monthly on monthly basis once a month so that one is just to check the performance of how far they've gone with the implementation of the syll...of the curriculum and also to see to it whether the assessment task that they are giving is in line with what is said by the subject policy and also with the meeting also just to give the feedback to the teacher may be if there is something that he hasn't done well or something he has done good.

Moreover the findings accentuate that the middle managers regarded ensuring availability of all resources to the educators to be one of their roles. They also considered monitoring educators' work by checking the lesson plan preparation and unpacking learning outcomes and assessment standards, facilitating moderation and utilizing the expertise among the educators thereby promoting teacher leadership also to be another of their roles. The following response testified that middle managers used expertise of educators as part of executing their roles; and also not to centralise their expertise and authority but to devolve it to educators at junior level or post level one:

Okay as I've said earlier on that now I'm not a Maths expert but when it comes to moderation I check whether the paper is up to standard or to the level of the learner. So I used those who've got an expert in Maths.

In fact the understanding and the practice of middle managers with regards to the foregoing roles delineated by the findings is congruent with Revell's (2005) acclamation. His point of view is that middle managers "have to recognize and utilize talents and expertise of others, they have to monitor and evaluate pupil and staff performance against the aims and objectives"(p. 14). It is evident therefore that there are striking similarities between the findings and the literature.

4.3.2 Administrative Duties to Support the Implementation of the Curriculum

Both middle managers respectively concurred that their roles encompassed operational management like the day to day organisation of the school, supporting and deputizing for the principal, maintaining discipline, encouraging parents' involvement in their children's education and fundraising for the school. In fact their views were advocated by the Employment of Educators Act 76 of 1998 (2003a) under job description of middle managers which states that "to assist the Principal in managing the school and promoting the education of learners in a proper manner, to assist the Principal in his/her duties and to deputise for the Principal during his/her absence from school"(p. 65). The deputy principal, who also acted as an HOD, acknowledged that in as much as she was aware of her administrative duties, her department lacked involving parents academically; the only thing her department did was to invite parents to see learners' work. She mentioned various reasons why parents were not fully involved: Among the reasons, she highlighted that parents did not understand the learning outcomes and the assessment standards. Her point of view with regard to the involvement of parents to assist learners with school work was as follows:

In that one our department lack, because we only just call the parents to see the performance of the learners. But for sure really in reality they don't understand these learning outcomes and assessment standards so we are lacking in that one to involve them, they should be involved.

It is evident from the foregoing that the understanding of the middle managers with regards to this administrative role was sound but various crucial points which the literature considers imperative in executing this role were left out. The literature enumerates a considerable number of administrative roles that the middle managers are expected to execute to achieve the aims of the curriculum. Among others, according to the Employment of Educators Act 76 of 1998, is "to assist the Principal, or, if instructed to be responsible for: school finance and maintenance of services and buildings, e.g. planning and control of expenditure, allocation of funds/resources". It goes on to say "to liaise on behalf of the principal with relevant government departments, implement the school policy and participate in professional management of the school"(p. 66). Thurlow (2003) extends the understanding by stating that management is concerned with execution, planning, organizing and deploying. He, in addition, mentions that the role of

management involves designing and carrying out plans, getting things done and working effectively with people.

From the data it emerged that the curriculum implementation and challenges differed according to the following categories: learning programme, integration, assessment, and resources. It is worthwhile, however, to take cognizance of the fact that as the analysis of these categories unfolded in this theme (curriculum implementation and its challenges); they touched a variety of topics pertinent to the curriculum implementation, for example the subject framework, the work schedule, learning outcomes and assessment standards, the different ways of assessing like the norm reference and the criterion reference assessment. It further touched on different types of resources like the school human resource, physical and financial resources.

4.4 DESIGNING THE LEARNING PROGRAMME (LP) AS THE TOOL FOR PLANNING AND IMPLEMENTING THE CURRICULUM.

This category posed a challenge to middle managers when contrasting their views with what the literature says about designing the learning programme. It is evident from their responses that they knew that the learning programme comprised the three documents that the teachers had to design to meet the expectation of the Department of Education. The following responses testified to this notion:

So there is a subject policy, but normally in our, most of the learning programme has been design by the department, it comes being organised by the department. The only thing that the teacher does is just to do the lesson plan taken from the subject policy. The only thing that the educator does is formulate his or her work schedule.

Another participant said:

No we ehm, what we normally do is that, okay we list down the topics; everybody will list down his topics he will teach for the year, ya for the quarter. Then we look at it critically we go in detail, writing marks everybody's marks they usually come late, because they have to apply what we are doing. So we pick a topic and if it happens that it goes round to all of us then we can make it we can sit down and share it. Is not easy, sometimes is

not applicable to everything to all the subjects where applicable that's what we do. If it is not applicable we leave, ya we leave it.

Moreover further contradictions emerged when the findings were juxtaposed against the Norms and Standards for Educators (2000) coupled with the Duties and Responsibilities of Educators (1999). These policy documents, designed by the Committee on Teacher Education Policy (COTEP) and the National Department of Education respectively, outline the Duties and Responsibilities of Educators at each post level. Albeit not all roles, duties and responsibilities of middle managers are discussed in this section. One of the role middle managers are expected to play according to these policy documents is to be the interpreter and designer of learning programmes and materials. This role necessitates that middle managers design, evaluate and adapt learning programmes. It is conspicuous that it is not the duty of the department of education to design learning programmes but is the duty of middle managers and educators. The department of education merely lays the guidelines that the educators can use to design their learning programmes.

The following response came after I tried to probe a response about the design of the learning programme. I wanted to find out where middle managers sourced the topics they deliberated about:

No, from what, from the policies. No we have something like a, what you call it we have something like a syllabus is not the syllabus as such but it looks like a syllabus, where you have your assessment, so that is where we get those things from.

The findings with regard to the foregoing revealed that the first response of the middle managers resonated with the contemporary literature fairly well. However their last response was incongruent with the first response and is contradictory when juxtaposed against the National Curriculum Statement Learning Programme Guidelines (2005, p.22), which states that “learning programme is a tool that enables teachers to plan for sequenced learning, teaching and assessment across the further education and training band”. It further recommends teachers of the same subject at a school to first put together a broad subject outline (i.e. subject framework) for the band to place the subject in context.

A learning programme for the appropriate implementation of this new curriculum is an essential tool. The understanding delineated above reveals the challenge the DoE is facing as well as the challenges faced by middle managers at school level. It however concurs with what Fleisch (2002) says, viz. the new curriculum challenges encompass too little capacity and too much jargon. In fact this became apparent when concepts of the new and old curriculum like learning programme, subject framework, and work schedule were still being confused with syllabus, as can be seen from the quotation above.

4.5 INTEGRATION AS ONE ROLE IN IMPLEMENTING THE CURRICULUM

The Department of Education (2003b, p. 1 and 3) regards integration as one of the principles of the National Curriculum Statement (NCS) and as an issue to be addressed when designing a learning programme. It is achieved within and across subjects and fields of learning, using the learning outcomes and assessment standards. Almost all the findings from both the interviews and questionnaires as data sources revealed inconsistency and contradictions with the literature.

From the data collected in this study, it became apparent that, in one of the schools, internal workshops were held to support staff in the integration of learning outcomes and assessment standards. In the other school, discussions were held regarding the programme of assessment (POA) to ensure the spreading of assessment across the term for the different learning areas. Participants made mention that this was done to avoid duplicating learning outcomes. One respondent, when asked about integration, reported that *“the curriculum itself integrates and the subjects integrate according to topics and concepts”*. He further mentioned that *“integration goes beyond the subject in department to other subjects in other department”*. A further respondent mentioned that they used topics to integrate and this process of integration was done at the beginning of every term. This understanding of integration by the middle managers was perhaps a result of poor training received from the DoE. When asked about formal training they received two HODs responded by saying. *“There is no formal training since I became the HOD”*. One of them went on to mention that *“we are merely informed about new developments with regards to the implementation”*.

The findings with regard to formal training coincide with how the HODs are promoted or graduated from post level one to a promotion post. There are parallels with these findings

and the international literature about the promotion of the HODs. For example, Gold (1998, p. 1-6) postulates that “HODs are promoted because they know a lot about learning and teaching in their subject and they develop managerial skills while doing the job”. He also makes mention of seniority or status, energy, particularly understanding of the way the organizations work and an ability to work within them, the ability to effect change or the combination of these and other reasons. He however acknowledges that their roles are not clearly defined, especially in a very small department. His point of view became apparent in my study when participants reported about the number of subjects they were heading in their department:

There are, is Maths, three Maths, Science, there are five educators. They combine subjects because some of them they are taking Maths and Technology others are taking Maths and Science, Maths/Lits and Science others are taking Maths and English so they combine.

This also testified to the fact that in a rural area, such as in the Midlands District, demarcation lines on the subjects educators specialised in were blurred. Middle managers promotion posts are being guided by the school curriculum needs rather than on the qualification or expertise of the incumbent.

4.6 ASSESSMENT AND MANAGEMENT OF EDUCATIONAL CHANGE AS A ROLE IN ENSURING APPROPRIATE IMPLEMENTATION OF THE CURRICULUM

Respondents in the study indicated that outcome based assessment tested many skills, knowledge and values, that is to say it was holistic in its approach. The concept used in conjunction with Outcomes Based Assessment by the participants was criterion referenced assessment. Their views were that “*it is focused, it exposed learners to the outside world and make them globally competitive*”. For them it did this through critical outcomes, which required learners to be able to identify and solve problems, work effectively with others, organize and manage themselves. However, the participants acknowledged that in as much as they knew that there were different forms of assessment for this new curriculum, they did not use them appropriately. Moreover they expressed their disapproval of the old methods of assessing. They blamed it for being serial in its approach, for example it only instilled teach-test-teach methods.

In the response from the questionnaires, with regard to norm and criterion referenced assessment as a way that distinguished the old from the new way of assessing, two of the four respondents did not respond to the question. The other two responded by saying “*it is very good, educators use a variety of assessment forms*” and “*it is used by all educators*”. On requesting the programme of assessment document which outlined assessment implementation in their schools, it became evident that half of the assessment occurring in the schools was still based on testing and examinations while the other fifty percent included a variety of assessment forms. The programme of assessment sheets have been appended in this dissertation for further perusal. The intriguing part of the programme of assessment done at the school level in this study was its link to the policy document itself. The following excerpt has been adapted from National Curriculum Statement Grades 10-12 Subject Assessment Guidelines (2007).

Table 1: Number of assessment tasks which make up the Programme of Assessment by subject in Grades 10 and 11.

SUBJECT	TERM 1	TERM 2	TERM 3	TERM 4	TOTAL
Language 1 : Home language	4	4*	4	4*	16
Language 2 : choice of HL or FAL	4	4*	4	4*	16
Life Orientation	1	1	1	2	5
Mathematics or Maths Literacy	2	2*	2	2*	8
Subject choice 1*	2	2*	2	1*	7
Subject choice 2*	2	2*	2	1*	7
Subject choice 3	2	2*	2	1*	7

Note

* One of these tasks must be an examination

Two of the assessment tasks for each subject except Life Orientation must be examinations. In Grades 10 and 11 these examinations should be administered in mid-year and November.

The link between the programme of Assessment done at school and the policy documents studied lie mainly on the number of assessment tasks given a year. For example the work schedule studied depicts seven of them of which the contemporary policy document

advocates the same number; dependent on the subjects themselves. However from the programme scrutinized there were no different forms of assessment utilized as the contemporary policy advocates. In fact the policy advocates assignments, projects, practical work where feasible, oral presentation and many others to be implemented during the process of assessment.

With reference to the educators' portfolios, the following has been included in this dissertation: a copy of the subject framework, work schedule life sciences grade 12, Programme of assessment, instructions for assessment task, and assessment instruments for the task. These were kept as part of record keeping and monitoring of the progress of the learners. However as the content page of the portfolio is appended the following were not very vivid in the portfolio as the contemporary policy requires. The assessment guidelines state that when managing the educators' portfolios, a brief description of the form/type of assessment given and learning outcomes addressed must be clearly stated. Moreover the level of achievement and comments for support purposes must also be stated in the educators' portfolio.

These findings are congruent with Lubisi et al (1998) when they point out that learner progress is measured against criteria that indicate attainment of learning outcomes rather than against other learners' performance. This is against the norm referenced assessment which measures the progress of learners against other learners or a class average. In criterion referenced assessment learners strive to achieve assessment standards at their own pace through continuous assessment. One can deduce from the documents analysis that it was very difficult for the middle managers to follow the policy as it is (it requires that the different forms of assessment must be covered).

4.7 RESOURCES AS INDISPENSABLE TO CURRICULUM IMPLEMENTATION

The issue of resources (human, physical, financial and teaching resources) in this study transpired to be a curriculum challenge for the middle managers when performing their roles of implementing the new curriculum. This was essentially when asked about the number of staff members in their department in contrast to the number of subjects or load they were teaching. The following table indicates number of educators and subjects in

one of the departments at each of the study schools. Responses came from the questionnaires.

Table 2: Number of Educators and subjects in one Department per school

SCHOOL A Name of the department	Number of HODs at the school	Number educators her/his department	of in	The subject in his/her department
Humanities	3 departments and 3 HODs	3		History, geography, HSS, English, Zulu and Life Orientation
SCHOOL B Name of the department	Number of HODs at the school	Number educators her/his department	of in	The subject in his/her department
Science Department	3 departments and 3 HODs	5		Maths, Science, Geography, Mathematical Literacy, Computer Application Technology and Life Sciences

The table shows that the middle managers, in their school department, head subjects beyond their specialization. It shows fewer numbers of departments as compared to the curriculum needs that are experienced at the FET schools. According to the policy for the National Senior Certificate (NSC) grades 10 – 12 (2005) a full time candidate must present seven subjects. The table further shows the number of educators which is disproportionate to the subjects the department offers. The middle managers reported that each educator takes two to three subjects across two phases, the senior phase which offers grade 7-9 and the FET phase that offers grade 10-12. They further conveyed their concern about the overburdening of work to educators.

Moreover the findings from the questionnaires revealed that other educators in their department taught more than their specialization. In the midst of this crisis there were novice educators who had no training in some subjects. Others were relocated as they were declared in excess in their previous schools due to the Post Provisional Norm (PPN). According to the participants, all the above challenges sacrificed the quality of education offered to learners and posed a great challenge to the middle managers whose role it was to ensure that the curriculum was implemented according to the policy requirements.

However it transpired from the interviews that middle managers sometimes managed subject (s) beyond their specialization through creatively employing the strengths of teachers to lead in the areas where they themselves were not qualified to lead. During the interview process middle managers reported that: *“We embark on peer tutoring whereby educators teach one another in this new curriculum”* One of them further said *“when moderating teachers work as I am not an expert in many of these subjects I am managing I use those who know it”*. They further said *“my role as an HOD is to lay an outline – all teachers are leaders and we inculcate the spirit of team work”*. This was real evidence of a form of teacher leadership within a framework of distribution. Grant (2006, p. 514) defines distributed leadership as “something not ‘done’ by an individual ‘to others’, rather it is an emergent property of a group or network of individuals in which group members pool their expertise”. She further points out that “it concentrates on engaging expertise wherever it exists with the organization rather than seeking this only through formal position or role”(2006, p. 513). In the context of my study, teacher leadership was allowed to emerge because there was a desperate need for more curriculum leadership in the schools. Middle managers were only too relieved to relinquish their power, decentralize it and hand it over to specialist people.

4.8 FURTHER CURRICULUM IMPLEMENTATION CHALLENGES

Middle managers revealed that, other than the core curricular challenges that they faced, they also had to grapple with time, transport and distance. They mentioned that time was a critical factor which affected rural schools. One of the respondents expressed her concern that: *The time allocated per learning area is not sufficient according to the new curriculum policy*. She went on to say *instead of about an hour per lesson we allocate less than forty minutes*. In fact this was the set up at her school, and this organisation contradicts the views of the National Senior Certificate Policy (Department of Education, 2005b, p. 16) which states that “the contact time for teaching NCS grades 10-12 for grades 10, 11, and 12 will be 27,5 hours per week, excluding time allocated to breaks, assemblies and extramural activities”. In fact the policy goes on to spread the contact time per subjects and states categorically the number of subjects per stream that have to be offered. It could be that the middle managers interviewed were not conversant with the National Senior Certificate policy document or that they were not appropriately trained in drafting time tables according to the policy requirements.

4.9 PROCEDURES AND DOCUMENTS FOR MANAGEMENT – POLICY AND PRACTICE

This section looks at how the middle managers put policy into practice and what procedures and documents were used to translate policy into practice.

Davey (2006) identifies eight of nine legislation and policy documents that are supposed to be used to translate policy into practice (implementation). These policy documents include NCS subject statements, Language in Education Policy, Religion and Education Policy, HIV and AIDS, White paper 6, inclusive education, Norms and Standards for Educators 1998, the National Senior Certificate and National Protocol on Assessment. E-education is also a policy document that is useful on translating policy into practice. The Learning Programme Guideline document (2005) states that all the above policy documents have to be taken into cognizance when designing the Learning Programme. These policy documents ensure that all aspects pertinent to the curriculum are covered to the benefit of the diverse learners needs within South African classroom.

Moreover, for the purposes of document analysis, the National Protocol on Assessment document of 2005 has been used as a criterion to analyze middle managers documents that are used for teaching, assessing and supervising learners' and educators' work respectively. The National Protocol on Assessment or NPA (2005a) defines teachers' portfolio as a compilation and recording of all tasks for school based assessment. It is a collection of all the assessment tasks the annual programme of assessment, learning programme and subject record sheets. The NPA goes on to point out that "the teacher's portfolio should provide the learning outcomes and assessment standards assessed in each task and in each activity". Furthermore it points out that "in the record of assessment tasks the teacher should clearly show how the learning outcomes and assessment standards have been integrated in the design and development of the tasks"(Department of Education, 2005a). Documents from the middle managers were requested in my study for the purpose of understanding how they translate National Curriculum Policy statement into practice. The following table serves as summary of what transpired while doing document analysis. The rating scale is that 1 stands for the presence of the document and is according to the department policy outlined above, 2 stands for the presence of document but is not according to policy while 3 will stands for non existence of the document.

Table 3: Summary of Document Analysis

Criteria	School A	School B	Comments
Teaching portfolio	2	2	There is a teaching portfolio, but not for each grade. The grades are combined in one portfolio.
Legislation & policy document	1	2	School A has the policy documents and legislation, whereas in school B not all documents are kept.
Learning Programme: subject framework, work schedule and lesson plan	2	2	In both schools there is evidence of learning programmes but they are incomplete.
Programme of Assessment	2	2	In both schools the programme of assessment is inappropriately done.
Recording mark sheet	1	1	There are mark sheets
Evidence of moderation	1	1	
Evidence of different forms of assessment	1	2	School A different forms of assessments are being attempted. But school B use test as a form of assessment only.
Minutes of the department	2	2	There are minutes of the departmental meeting but not consistent throughout the year.

As much as Davey (2006) outlines eight policy documents and legislation that are indispensable when one is implementing the new curriculum, these documents spell out concisely how the curriculum is supposed to be managed and implemented. The Department of Education (2007) Assessment Guidelines states that an educator's portfolio is required for every learning area. The same document (Assessment Guidelines) however defined portfolio as a compilation of all the tasks for school based assessment as well as the corresponding assessment instruments (Department of Education, 2007, p. 16).

Legislation and policy documents as highlighted from Davey (2006) above are all required to assist the educator in designing the learning programme. The Learning Programme Guidelines document (2005) shows that there are three stages of the development of a Learning Programme: the first stage is the subject framework; the second stage is the work schedule and the lesson plan. This document further states various issues to be addressed when designing a learning programme. These issues are policies and principles, conceptual progression, content and context, integration, time allocation and weighting, LTSM (resources), assessment, inclusivity and diversity.

In my study document analysis (see table three above) showed that there was a gap between the practices at school level and the policy requirement. This posed a challenge to the middle managers in implementing the new curriculum. It also posed a challenge for the Department of Education in ensuring that there was a follow up to the workshops conducted. In the final chapter of this dissertation I discuss the findings against the literature provided and draw some conclusions.

CHAPTER 5

5. CONCLUSION

5.1 SUMMARY OF CHAPTERS

This study was undertaken to investigate the middle management's roles in implementing the new curriculum at grades 10 -12 level. This final chapter discusses issues that emanated while conducting and writing the previous chapters of the research study. The first chapter elaborated on the need that necessitated the undertaking of this research study. As the subject statement put it, the advent of democracy and the adoption of the Constitution of the Republic of South Africa (Act 108 of 1996) provided a basis for curriculum transformation and development in South Africa. From this emanated the need for middle managers to fine tune their roles to meet the expectation of the new FET curriculum in schools. The first chapter of the dissertation focused on the background, context, rationale and critical questions. These aspects offered a background to the study by contextualizing the study and offering the rationale that necessitated the undertaking of this study.

The second chapter dealt with the related literature review. It focused and elaborated mainly on three key themes relevant to the topic. The first theme elaborated on the impact of curriculum changes in South African schools. It further provided background on the origins of the National Curriculum Statement and the Outcomes Based Education. Local literature provided the background needed for the changing of the curriculum whilst simultaneously contextualized the transformation process of the curriculum. The second theme was about the management of educational change and the re-articulation of roles in the teaching profession. In this theme the key point propounded by literature was to restructure the South African education to be in line with the constitution to expedite curriculum transformation to accommodate all races. The theme further enumerated various perspectives needed to be possessed by middle managers in managing educational change. These perspectives encompassed structural perspective, humanistic perspective, political perspective and symbolic perspective. The third theme was the real and ideal in implementing the policy process. Real and ideal were the concepts used to critique the policy implementation processes as it underpin the National Curriculum Statement which is currently being implemented in South Africa. This theme was meant to testify to the gap and the paucity of communication that prevailed between research

and policy. Among the critical issues it highlighted were the debates about the relationship between policy formulation and implementation and between policy and practice. It however, spells out criticisms levelled against the linear sequential order of the different stages of the policy cycle.

Chapter three elaborated on the research design and methodology. This being a qualitative study, in chapter three it was mentioned that the interpretivist theoretical framework was employed to frame the study. The chapter further mentioned the research challenges I have to overcome from the inception of this study. It likewise expanded on how the schools used in this study were selected, how access was achieved and how selection of participants was done. The last parts of the chapter discussed the three methods of data collection namely; questionnaires, interviews and documentary analysis as well as data analysis processes. Issues of validity and reliability were also raised within the chapter.

The intriguing aspect noted when summarising the chapters was the marked similarities and differences that emerged between the empirical text and the theoretical text as stated in the preamble of chapter four. It was of pivotal importance to conclude this study by synthesising both texts. Starting with the similarities that emanated from both the literature reviewed and the findings:

It emerged that there was a need to change the curriculum after 1994 in South Africa. The change was non-negotiable due to the fact that past imbalances had to be redressed. Another striking similarity was about the roles of the middle managers at school, when it came to implementing and managing the curriculum according to departmental policies. Although middle managers agree that designing learning programmes were part of their role, there was a discrepancy between the literature and findings in terms of how it this process was understood and happened.

As much as the literature accentuates using the expertise of educators in issues of curriculum development and innovation, the findings testified to that as well. Middle managers in the study relied heavily on post level one educators to lead curriculum development in areas where they, the middle managers, did not have expertise. Because these middle managers were expected to lead subject areas beyond their own specialisation they relied on experienced teachers to take this lead for them. These post

level one educators were far more able to lead the curriculum process (including content knowledge and methodology) within their own subjects. There was therefore concord between the literature and the findings of the study about the potential of teacher leadership. However, one has to note that the form of teacher leadership apparent in this study emerged out of a sense of desperation on the part of the middle managers rather as something that was deliberately planned in a structured and conscious manner. Instead the distributed leadership emanated from a sense of crisis and emergency which offered a cushion to address the shortage of curriculum expertise amongst middle managers in the schools.

A further common trend in the literature and in the findings of this study highlighted the administrative role of the middle managers as they supported and deputised for the principal and fundraised for the school.

However, the findings of the study when further juxtaposed against the literature reviewed, revealed some contradictions. While the literature takes into account the context and constraints under which the middle managers work, this study highlighted the importance of the impact of context and school resources on curriculum issues. The findings revealed that the rural context of the study gave rise to curriculum constraints like time, transport, poorly resourced facilities such as libraries and laboratories. The middle management at these rural schools had to grapple with these constraints on a daily basis. In addition to this, the analysis of documents revealed that not all policy documents were available at the schools and, as a result, designing learning programmes became a challenge. In other words the curriculum was not appropriately implemented as determined by the National Department of Education.

5.2. CONCLUDING COMMENTS

In attempting to summarise the key learning in this study from an education leadership and management perspective, the following is clear. The key role of middle managers in the curriculum process in these two schools is one of management. The dictates of policy served to construct the role of the middle manager as an implementer of national curriculum policy. The findings also revealed that the constraints of practice in these two schools impacted on the endeavours of the middle managers to implement the curriculum. School curriculum documents were at times at odds with what departmental

policy expected. Furthermore, the management function of these middle managers dominated their curriculum work at the expense of leadership. A lack of time, limited resources and a lack of training of these middle managers impacted on the possibility of curriculum development, innovation and leadership in the two schools. This imbalance between too much management and too little leadership, as argued by Davidoff and Lazarus (2002), does not necessarily lead to an effective school as they argue that both leadership and management are needed for an organisation to prosper.

The salient point, I argue, is that the processes of leadership and management are essential to effective curriculum development in schools and, in the schools in my study, the management processes overshadowed most forms of leadership. However, teacher leadership in my study emerged when the middle managers recognised that they were not curriculum specialists in all areas and so called on teachers to utilise their talents and expertise as well. Thus they distributed leadership by “engaging expertise wherever it exists within the organisation rather than seeking this only through formal position or role” (Grant, 2006, p. 513). This was a necessary and sensible move on the part of the middle managers in an attempt to ensure effective curriculum leadership. Grant’s (2006) sentiments resonate well with the findings of this study which showed how collaborating and synergising structures in a drive to share knowledge within a school can keep a school moving forward. The response of middle managers to the current reform process at the Further Education and Training level leant towards teacher leadership and revealed that middle managers were willing to relinquish their power accommodate a more distributed form of leadership that could contribute to school improvement. And, as Harris (2004) argues, distributed leadership “extends the boundaries of leadership significantly as it is premised upon high levels of teacher involvement and encompasses a wide variety of expertise, skill and input” (p. 14)

5.3 RECOMMENDATIONS

It would appear from the findings that the middle managers’ roles in curriculum development and innovation in South Africa are not taken seriously by the Department of Education. I say this because of the paucity of training for middle managers in the area of curriculum leadership and management. Moreover there is no specific qualification, other than the teaching diploma, needed for an educator to be an HOD. This suggests that no

training in curriculum implementation is deemed necessary in order to become an HOD within a school.

Moreover the findings further revealed that the middle managers in South Africa, particularly in the more rural areas, have full loads of teaching that leaves them with no space to plan and do their administrative roles as the policy documents requires. The other critical aspects revealed by the findings were that in these schools, due to the Post Provisioning Norm (PPN) and the teacher learner ratio, middle managers move from one school to another when they are identified as excess in their school's post establishment. In the next school the middle manager is sometimes allocated learning areas and subjects that are not within her specialization. In fact this situation is a challenge to many HODs in such a way that they struggle to execute their roles as is expected by policy. One would further mention that the process of redeployment and rationalization (moving from one school to the other due to PPN) of educators lowers the morale of educators and often renders the schools dysfunctional as internal school planning cannot be executed due to the fact teachers do not know what the future hold for them.

The issue of a lack of time for administrative duties is a huge problem for middle managers, especially in poorly resourced schools. It could be recommended that at least rural schools be provided with sufficient educators per department and one HOD or a grade controller who will have fewer periods for teaching but have a little time set aside for administrative duties. In addition to these challenges, sometimes middle managers do not reside near the schools where they work, as was the case with some of the middle managers in this study. This also proved to be a barrier to implementing the new curriculum. It was also noted that National Curriculum Statements need a lot of time for preparation. For educators to be innovative and creative, they need time to deliberate on curriculum issues within the school.

With regard to learning programmes, one could also conclude from the findings that middle managers have merely a vague idea of what constitutes a learning programme. It could be recommended that the HODs be taken and trained specifically on how to lead and manage curriculum issues (such as developing and administering learning programmes, dealing with issues of assessment, record keeping etc. within their departments). Where HODs head four or more different subjects they cannot possibly stay abreast in all areas and so they need to rely on the expertise of teachers.

Finally, it must be acknowledged that school middle managers require training in handling school resources such as human, physical, and financial resources. In some schools, particularly rural schools, resources are inadequate and this renders HODs unable to execute their roles appropriately. It could be recommended that HODs are staffed with adequate teachers and the redeployment and rationalization departmental programme be put in a moratorium, as has been indicated recently. With regards to physical resources (classroom, desks and LTSMs), they need to be stocked appropriately. The finance to the no-fee schools ought be allocated and deposited into school accounts in January of the school year in order to allow schools to operate effectively. This was a challenge for the section 21 school in this study as they received their allocations late. There should also be a drive to convert section 20 schools to self managing school so that procurement will also be fast tracked. This study leaves a room for further research of which the area of interests could be to investigate the same topic of middle management from the Department of Education's perspective.

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APPENDIX A**INFORMED CONSENT FORM REGARDING PROPOSED MIDDLE MANAGEMENT'S ROLES IN THE FET GRADE 10-12 LEVELS**

P.O.Box 831

Mooi River

3300

21 June 2007

Dear Sir/Madam

Re: CONSENT FORM FOR PARTICIPATING IN THE RESEARCH PROJECT

I would like to thank you in advance for agreeing to participate in my research project.

The project title is about investigating middle management's roles in implementing the new curriculum at grade 10-12 level: a case study of two schools in the KwaZulu Natal Midlands.

The aim of the project: is to explore the roles of the Middle managers in implementing the new curriculum at the FET band of the secondary schools. The new curriculum brought with it new challenges in terms of teaching, learning and assessment, it is the aim of this research study to find out the roles played by the middle managers in overcoming these challenges.

Currently I am doing a Master of Education degree called "Education Leadership, Management and Policy" with the University of KwaZulu Natal in Pietermaritzburg. My contact details are as follows:

- Physical Address No 8 Edgehill Court, Claughton terrace, Mooi River.
- Postal Address P.O. Box 831, Mooi River, 3300
- Cell 0738444558
- E-mail Address velinxu@yahoo.com

The name of my project supervisor: is Dr. Wayne Hugo, his contact details are as follows

- Telephone (w) 033 260 5535
- E-mail Hugow@ukzn.ac.za

I have approached you because of your experience in the field of management, particularly because you are a teacher and you know about the new education reform process in South Africa.

I would like also to inform you of the following procedures during the research project.

- The length of the project will take two months
- The procedure will be to conduct questionnaires, have a look at the files you use when moderating and monitoring teachers work (documentary analysis) and conduct interviews
- If you feel uncomfortable with any procedure or question(s) posed you are free not to answer it
- The project has no danger

I am hoping that at the end of the project you benefit knowledge.

A digital voice recorder will be used during the interviews; this will help during the analysis of data. However if you feel uncomfortable with it you can tell me

It is worth also knowing that during data collection and analysis the data will be stored in the lot cupboard at my home. Upon submission of my dissertation the data will be kept by the university for a period of five years.

In addition you are assured also of anonymity and confidentiality that this will be strictly adhered to. No information about you will be divulged to any one.

Lastly decision not to participate will not result in any form of disadvantage: to participate in the project is not compulsory. As you will be a participant you can withdraw anytime you so wish. This is irrespective of how far the project has gone. In other words participation is voluntary.

DECLARATION

I. _____ hereby

confirm that I understand the contents of this document and the nature of the research project, and I consent to participate in the research project.

Signature of participant

Date _____

APPENDIX B

QUESTIONNAIRES FOR SCHOOL MIDDLE MANAGERS

The middle managers (Principals, Deputy Principals, HODs and grade controllers) are a vital cog in the FET grade 10 – 12 level reform process. Exploring their roles in implementing the new curriculum is of vital importance.

- The previous two years 2005 and 2006 respectively the KZN FET directorate conducted NCS orientation workshops all over the province of KZN; you must have attended one of those workshops. There were also a number of workshops conducted by Non-government Organization currently being called the Non-Profit Organisation (NPO) and booksellers in support and in promoting their books respectively, of which among other things they shed light on are issues pertinent to the new curriculum and how it should be implemented.
- I want to know how you found those workshops with regards to your role as a middle manager.
- This will help in understanding the roles of middle managers in implementing the new curriculum at grade 10-12 level.
- Please complete this questionnaire and return it if possible before the 29 June 2007.

Your reply will be treated as confidential.

I like to thank you in advance for your cooperation

Yours Sincerely

Nxumalo Velile Nicholas

1. How many departments do you have? And how many HODs or grade controllers do you have in your school?

2. What is the name of your department you are heading at your school? i.e. is it:

- Humanities department ☐
- Language department ☐
- Science department ☐
- Any Other. _____

3. Can you write below the names of the subject (s) in your department?

4. Why are you heading more than one subject if you do? Or if you do not why aren't you?

5. Do you think clustering subjects in one department is advantageous or not? Could you elaborate?

6. How many educators in your department?

7. Do you have educators who take more than one subject at grade 10-12 level?

8. As a head of the department how do you find working with educators who teaches beyond your department's parameters? _____

9. Will you briefly tell me about your department? How it is organized and the way you do things.
In terms of meetings, the way you keep your department functioning, how do you keep your teachers motivated to teach the new curriculum?

10. How do you work with other departments in your school (integration) in FET phase?

11. Which workshop or training you have attended that helped you to execute your roles or duties as HOD?
- Departmental workshops ☐
 - Publishing Companies ☐
 - Non Government Organisations ☐
 - Course at University/College ☐
 - Any other specify _____
- _____
12. What is it that you found helpful to you in the workshop or training you have attended in the above question?
- Are the methods of teaching ☐
 - Is it how to assess the new curriculum ☐
 - Is it how to manage the your department ☐
 - Other _____
- _____
13. What you found least useful about the same training or workshop you mentioned above?
Please write in _____
- _____
14. What aspects of your roles as an HOD do you feel were not covered by the workshop or training? _____
- _____
15. Which document (s) help or are you using to guide you in implementing the new curriculum
- Nine policy document of the NCS ☐
 - South African Schools Act ☐
 - The National Protocol on Assessment ☐
 - Other _____
- _____
- 9.1 Are these documents helpful or are they user friendly? Please circle yes ☐ / No ☐
16. How are they helpful? Please write your response below.
- _____
- _____
- _____

17. What do you consider is or are the main role (s) of the HOD in implementing the new curriculum?
- _____
- _____
- _____
- _____
18. When do you conduct moderation of the teachers' work (please tick the correct box)
- weekly ☐
 - Fort nightly ☐
 - Monthly ☐
 - Quarterly ☐
 - Other _____
19. What is it that you are doing when you moderate?
- _____
- _____
- _____
20. What is the average pass percentage in your grade 10 last year?
- Was it between 20% - 40% ☐
 - Was it between 40% - 60% ☐
 - Was it between 60% - 80% ☐
 - Was it between 80% - 100% ☐
 - Other _____
21. What makes your department average pass percentage low or high?
- _____
- _____
- _____
22. How do you rate the cooperation of your staff in executing your roles as an HOD?
- Very good ☐
 - Good ☐
 - Adequate ☐
 - Poor ☐
 - Very poor ☐

23. The standard of support from the principal is high
- Agree ☐
 - Not sure ☐
 - Disagree ☐
 - Strongly disagree ☐
24. What can you say about the criterion reference assessment style in your department?
- _____
- _____
- _____
25. Both 25% and 75% are internal assessment but 25% is allocated to assessment task completed during the school year while 75% is for the end-of-year assessment. What can you say about these assessment components? _____
- _____
- _____
- _____
26. How do you ensure that educators adhere to the policy documents (i.e. the assessment guidelines) when assessing for the 25% and the 75% respectively?
- _____
- _____
- _____
- _____
27. Say for instance you are a head responsible only for the department you specialized on. Do you think the way you run your department will be different from what you are doing now?
- _____
- _____
28. Do you think the changing of curriculum from traditional to NCS had an impact your roles as middle manager? Can you please explain your response below?
- _____

APPENDIX C

INTERVIEW SCHEDULE FOR SCHOOL MIDDLE MANAGERS

I would like to explore the roles of middle management a little bit more in the school system. But the interview I would like to have with you will focus on the following three aspects

- *The curriculum change*
- *Managing educational change*
- *Policy and practice*

General Questions

1. How many middle managers or HODs does the school have?
2. The name of the department you are heading is?
3. How long you have been in this profession?
4. To an ordinary person how will you describe the middle manager according to the school's structure?
5. What are roles of an HOD generally?
6. How many teachers you are heading in your department?
7. How many subjects do you control in your department?
8. Do you have curriculum and assessment meetings as HODs? In terms of how to approach the implementation process? And to monitor teachers work. What do you focus on?
9. This question may sound stupid do you like your work? If you do what is it that you like or if you do not what is it that you do not like?
10. What is your comment about the new curriculum? In other words do you find it implementable or do you find it difficult to implement?

The curriculum change

Let's talk about the curriculum and the curriculum change in the country

1. There are two curriculums that are being implemented in the FET band currently (the NCS and the NATED 550 known as the transitional curriculum). In terms of implementation is there any difference?
2. Do you think the introduction of the new curriculum NCS brought about new challenges to the middle managers roles in managing the curriculum?
3. What were the roles of the HODs previously?
4. What new roles are brought by the new curriculum?

5. What are other changes the new curriculum brought with it?
6. What kind of training do the teachers and you have for this curriculum?
7. Your feelings about it?
8. Are there other trainings or workshops other than the departmental one do you organize for your department pertinent to the curriculum?

Managing Educational change

1. The way that assessment is done has changed into the new curriculum, what could you say about this?
2. The structure of the curriculum has also changed, how do work around integration of subjects?
3. How do you organise the content of your subject? How do you plan to teach it?
4. Do you inculcate the same to your subordinate?
5. Your subject, how is it organised in relation to other subjects?
6. How do you incorporate or ensure that everyday knowledge of the learner is utilized in your teaching or in your department at large?
7. How do you manage educational change that is taking place in the education system? (Culturally and contextually)
8. How do you approach issues in your department that affect the curriculum? In other words do you take everything upon yourself or do you conduct seminars where everybody will feel like a leader or the manager in your department?
9. Can you give an example of that?
10. How do you bring every stakeholder on board to accommodate change in your department? i.e. the learners, teachers, parents and the principal?
11. Let's talk about reform, improvement and change. How will you explain the influence of culture and context specific to the roles of HODs in implementing the new curriculum?
12. Do you think the roles of HODs in implementing the new curriculum particularly in rural schools can be influenced by lack of resources (Human resource, physical resources financial resources etc)?
13. Will you explain how this situation could be improved?
14. HODs have been on the receiving end of the top-down management structure. Do you think the educational change that is currently underway have a possibility to change this pattern?

Policy and Practice

1. Having meetings for every decision to be taken in order to map the way forward for the department may be taxing sometimes how do you do this without being judged as imposing?
2. What can you say about the departmental curriculum policies in terms of practical teaching? Do you think you have to follow them all the time or you do what is feasible in that particular context? i.e. the lack of resources, or human resources or else the learners may make your progress extremely slow due to poor understanding or shortage of LTSM
3. What do you do to ensure that all the learning outcomes are covered by the end of the year?
4. How do work with the slower and quick learners?
5. Does the school have a say on what has to be taught and how?
6. How do you design the learning programme for grade 10-12 level? Do you use textbooks with subject statement or only subject policy?
7. What type of assessment do you prefer and why?
8. There are about nine policies that the Department of Education formulated to be used when implementing the new curriculum. How do you find them?

I would like to thank you for your time and the information you shared with me.

APPENDIX D

LIFE SCIENCES SUBJECT FRAMEWORK

Subject Framework					
Main knowledge areas	Number of weeks per year	LO1 Scientific Inquiry & problem solving skills All AS's Covered All grades	LO2 Constructs and Applies Life Science Knowledge		LO3 Life Sciences, Technology, Environment & Society
Tissues, cell and molecular study (24½ weeks for the FET phase)	8 weeks	<ul style="list-style-type: none">• Microscopic skills or other comparative methods or resources• Research in a field of biotechnology e.g. cell structure, tissue growth, chemotherapy• Investigates (community) diseases: conducts surveys, collects data on e.g. Fungal, viral, animal and plant diseases; genetic diseases.• Collects latest research information on diseases e.g. Malaria resistance, TB incidence in South Africa	10	<ul style="list-style-type: none">• Cell structure, cell division (mitosis), tissues related diseases e.g. cancer• Micro-organisms (viruses, bacteria, protists and fungi) diseases e.g. rusts, blight, rabies, HIV/AIDS, etc• DNA, protein synthesis, chromosomes, meiosis, production of sex cells, diseases e.g. Down's syndrome Genes, inheritance, genetic diseases	<ul style="list-style-type: none">• Historical developments: IKS, biotechnology, environment legislation, social behaviour and ethics,• Ethics and legislation:• Tissue sampling, tissue culture, cloning, genetic engineering & ethics• IKS and biotechnology: micro organisms and biotechnology in the food industry e.g. cheese, beer.
	6 weeks		11		
	8weeks		12		
Structure and control of processes in basic	10 weeks	<ul style="list-style-type: none">• Structure of systems: investigate kidneys, hearts, eyes through	10	<ul style="list-style-type: none">• Energy release, food production, human nutrition	<ul style="list-style-type: none">• Historical development: IKS,

Life systems 24½ weeks for the FET phase)	11 weeks	dissections and or other comparative techniques using models, charts	11	and related diseases/ allergies	biotechnology, environment, legislation, social behaviour, ethics and beliefs.
	4 weeks	<ul style="list-style-type: none"> • Design a model: e.g. anatomy of a system such as the digestive system. Microscope work e.g. alveoli or stomata 	12	<ul style="list-style-type: none"> • Support (structural), transport, excretion, nervous and endocrine systems, related diseases of the above 	<ul style="list-style-type: none"> • Food manufacturing and preservation
	4 weeks	<ul style="list-style-type: none"> • Conduct research on any of the latest medical practices concerning life processes e.g. heart transplants laser surgery. • Investigate the human influences on the environment e.g. introduction of exotic species. 	10	<ul style="list-style-type: none"> • Reproduction and related diseases • Biospheres, biomes and ecosystems, living and non living resources, nutrient systems and energy flow within an environment 	<ul style="list-style-type: none"> • Drug influence, hormones like insulin, blood transfusion • Life support systems e.g. dialysis and organ transplant and ethics
	5 weeks	<ul style="list-style-type: none"> • Manage and maintain natural resources 	11		
Environmental studies (24½weeks for the FET phase)	4 weeks	<ul style="list-style-type: none"> • Investigate a local environment issue, problem solving and decision making 	12		<ul style="list-style-type: none"> • Sperm banks, surrogate motherhood, test tube babies, abortion and ethics

APPENDIX E**WORK SCHEDULE FOR GRADE 12**

Wk	Date	WORK PLANNED	Forms of assessment	LO's /AS's	Date Completed
1	16-18 Jan	Micro organisms			
2	21-25 Jan	Viruses			
3	28-01 Feb	Viruses	Practical	LO1, 2, 3	
4	4-8 Feb	Bacteria			
5	11-15 Feb	Bacteria			
6	18-22 Feb	Fungi Protista			
7	25-29 Feb	Immunity	Controlled test	AS 1,2,3	
8	3-7 Mar	Immunity			
9	10-14Mar	Transport & support in plants			
10	17-20Mar	Transport & support in plants			
TERM TWO					
11	14-18 Apr	Human Skeleton			
12	21-25Apr	Human Skeleton	Project	LO1,2,3	
13	28-2 May	Human Skeleton			
14	5-9 May	Human transport system		AS1,2,3	
15	12-16May	Human transport system			
16	19-23May	Human transport system			
17	26-30May	Human Excretory system			
18	2-6 June	Human Excretory system	Mid year		
19	9-13 Jun	Human Excretory system	exam		
20	16-20 Jun	Nervous system			
21	23-27Jun	Endocrine system			
TERM THREE					
22	14-18 Jul	Human influences on environment	Controlled Test	LO1,2,3	
23	21-25 Jul	Human influences on environment		As1,2,3	
24	28-1 Aug	Human influences on environment			
25	4-8 Aug	Sustaining environment			
26	11-15Aug	Sustaining environment			
27	18-22 Aug	Air, water, land borne diseases			
28	25-29 Aug	Air, water, land borne diseases	Practical		
29	1-5 Sep	Air, water, land borne diseases			

30	8-12 Sep	Population			
31	15-19 Sep	Population			
32	22-26 Sep	Social Behaviour			
TERM FOUR					
33	6-10 OCT	Social Behaviour			
34	13-17 Oct	Managing population and biodiversity			
35	20-24 Oct	Managing population and biodiversity			
36	27-31 Oct		Controlled test	LO1,2,3	
37	3-7 Nov	Exam preparations		AS1,2,3	

APPENDIX F

PROGRAMME OF ASSESSMENT**Grades 10/ 11**

Term 1	Term 2	Term 3	Term 4
Controlled test (1 Y2 hours - 100 marks converted to 10)	Mid-year exam (2 Y2 hours - 150 marks converted to 10)	Controlled test (1 Y2 hours - 100 marks converted to 10)	November exam PI - 2 Y2 hours - 150 marks P2 - 2 Y2 hours - 150 marks
Practical * 25	Project (Minimum 50 marks converted to 20)	Practical * 25	

* Of the 2 practicals one should be:
 Hands on - 50 marks converted to 25
 Hypothesis testing - 25 marks

Grade 12

Term 1	Term 2	Term 3	Term 4
Class Exercise	Class Exercise	Class Exercise	
Class Exercise	Research Project	Practical - hands on	
Practical - hands on	Practical - hands on	Class test	
Practical - worksheet	Practical - worksheet	Trial Exams	
Controlled test	Controlled test		
Class test	Class test		
Class test			

APPENDIX G

Grade 11 Research Assessment task

Question 1

Marks: 18

Research the topic on Heart Attacks and answer the questions that follow:

1. What is a heart attack? (2)
2. What is the main cause of a heart attack? (2)
3. state three symptoms of a heart attack (3)
4. State three lifestyle changes that one could make in order to prevent a heart attack. (3)
5. The tables below shows the heart rate of three people at 5 minute Intervals. On a single system of axes plot sketch graphs using the information from the tables. Draw the graph on the next page. Use a different colour for each person. (5)

Beats per minutes	Person A	78	78	76	76	78	78
	Person B	68	68	68	72	78	84
	Person C	115	115	117	117	116	118
Time (5-min int.		0	5	10	15	20	25

Assessment Rubric

Criteria	Max.	Mark
Graphs drawn correctly	3	
Little to graph given	1	
The x-axis is labelled	2	
The y-axis is labelled	2	
Correct scale on x-axis	1	
Correct scale on y-axis	1	
Points plotted correctly	3	
neatness	2	

- 5.1 Which person is involved in physical activity during the entire 25 minutes? Give a reason for your answer (3)
- 5.2 Which person is sleeping and appears to be entering a not so pleasant dream. Give a reason for your answer. (3)
- 5.3 Mention one way in which person A differs from person C. Give a reason for your answer. (4)