

**The Implementation of Integrated Quality Management  
System in Schools: Experiences from Mayville Ward**

By

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**DECLARATION**

I declare that this dissertation is my own work. It is being submitted for the degree of Masters in Education in the University of KwaZulu Natal. It has not been submitted before for any degree or assessment in any university.

  
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..... 13 day of ..... December ..... 2007

## DEDICATION

I dedicate this dissertation to my late mother Zenzele (Ma Sibiya) and my late father, Jeffrey Mncwabe for raising me to know that life is all about ubuntu, which is the basis of the important aspects of respect, with quality as its manifestation.

I also dedicate this dissertation to my wife, Jabu Ka Mazibuko Mncwabe, my two sons Thokoza and Mpumelelo Mncwabe for their love, close support, understanding and empathy in times of stress, and for always being on my side.

The third dedication goes to my late parents in law, Bellina Nondaba and Victor Mazibuko for adopting me as their son.

Lastly I dedicate this to my two sisters, Dolly Mncwabe and Nokuphiwa Gumede and her husband Nhlanhla, my sister in law Smangele Mazibuko and her husband Bulelani Khowa, my only brother Siphon Mncwabe and all my nephews and nieces.

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## ABSTRACT

This study examines the experiences of the school management teams and educators of Mayville ward schools regarding the implementation of Integrated Quality Management Systems (IQMS) policy at school level. The research was conducted as a case study in the Mayville Ward Schools in Durban, KwaZulu Natal, South Africa. This study was looking at the recently introduced educator evaluation system that is being in schools called Integrated Quality Management System (IQMS). This study also elaborates on the changes in the education history from the apartheid system to the democratic system of education.

Three schools participated in the study (two secondary schools and one primary school). These schools were purposively selected using convenience and easy access, as well as, the fact that they had started implementing the IQMS policy, as the main criteria for selection. Semi-structured interviews were used to gather data from principals, heads of departments as well as post- level one educators about their experiences of IQMS implementation. The findings indicated that while the IQMS policy was good on paper but it was extremely difficult to implement. Issues of honesty and trust were at the root of the difficulties that make IQMS implementation difficult. The participants' understanding of IQMS was that it was meant for the provision of quality education and development.

## **CHAPTER 1**

### **BACKGROUND AND ORIENTATION TO THE STUDY**

#### **1.1 Introduction**

This chapter presents the background and orientation to the study by, amongst other things, discussing the context of education in South Africa in terms of policy and the proliferation of policy as a result of transformation demands. It also elaborates on changes in the Education System. The purpose of the study, critical questions, significance of the study, key concepts pertinent to the study, as well as the outline of chapters are also presented and discussed towards the end of the chapter. This study looks at the evaluation system that is currently being used, the Integrated Quality Management System (IQMS) particularly from a principal's perspective. I serve the Department of Education in the province of KwaZulu-Natal as a school principal, and it is that kind of bias I carried as I conducted the research that this document presents. Throughout the research process I had to check if my biases were affecting the accuracy of the data by using a number of techniques. These included checking my questions whether or not they were focusing on the purposes of the study; when I had gathered the data, I had to confirm my initial findings with my participants.

#### **The study in context**

During the apartheid era the South African education system was not democratic. Such a scenario should not be a surprise when one considers the fact that apartheid and democracy do not speak to each other (Thurlow 2002) during the apartheid era there were different systems of education meant to service different racial groups. There was an education system for Whites, for Africans, for Indians and for Coloureds. The educators' evaluation system of that time had a number of flaws; for example, it was judgmental, it lacked educators' participation and it was imposed on educators by the central government. That system was

called the school inspection system. According to Thurlow (2002), the education system of that time was also subjective in order to fulfill the political, socially, cultural and economic needs of the apartheid education system. The apartheid education policy was presented to the educators to fulfill its objectives in education that were based on the political system's needs (Thurlow, 2002). This approach was characterised by top-down approaches with no consultation of stakeholders (Jansen, 1999). Although educators were steeped in and implemented a segregated education system that was planned by the central apartheid government, there were educators who, in their own unique ways used creative and innovative teaching strategies such as a learner-centred approach. Such teaching and learning approaches were indicative of how educators had adapted the apartheid way of teaching to a democratic approach to teaching.

These educators who worked in this way were a product of non-governmental organisations such as English Language Educational Trust (ELET) in which I participated. These organisations conducted in-service training for educators in order for them to improve their teaching skills. Such initiatives by the ELET played a major role in upholding and sustaining the quality of teaching and learning during system in education (Jackson, Mncwabe & Verser, 1996). There were many educators that enrolled with ELET on voluntary basis and they learned how to improve the quality of teaching and learning. Although initially the focus was on teaching English, later other themes were included such as classroom management and teaching English across the curriculum. It is against this backdrop that quality teaching was embraced by educators at that time. These educators were creative within an apartheid education system that was centrally designed and did not allow educator participation in its policy process. These educators had the skill of implementing policies as if they were part of its formulation. They facilitated effective learning experience in a learner-centred approach.

These educators were able to sift out relevant information from the brainwash

information for their learners. I can say that many educators of that time, in areas such as uMlazi and Inanda, started using their own ways of establishing and maintaining quality in their schools. The fact that some of the current officials in the Department of Education, particularly at the provincial level products of the same educators who were able to maintain quality in their own way should serve as a testimony to that.

The ELET organisation trained educators on how to design their own teaching and learning materials. In that way educators learned to be creative and innovative in terms of mobilising the support materials for learners. The classroom set-up was changing from a conventional one where learners sat in rows to a group format as it is currently done in many schools in South Africa today. Learners were encouraged and were indeed able to display their potentials and talents with confidence.

The school inspectors of that time had enormous difficulties in engaging with the learners who had been exposed to such an approach. The difficulty arose from the fact that during inspection sessions, Inspectors expected learners to be silent and only respond to questions that were posed by their educators. However, these learners, through their involvement in the ELET programme, had been exposed to skills of engaging with whoever was present in their classroom, and they were bold and confident in their discussions using the English language.

The assessment approach used by the educators that participated in the ELET programme came as a surprise even to the ELET officials. These educators' work was displayed by ELET during its special functions and some of the work ended up being published in the ELET publications because of its quality. Some of the educators even challenged the ELET approach on assessment because of what they perceived as inconsistency with the teaching and learning approach that ELET was propagating. Educators wanted to know why teaching and learning was communicative and learner centered but assessment that ELET

used was different. The ELET's assessment approach did not encourage learner involvement, except in teaching and learning, and it was, on the main summative, and was less formative. These educators came up with their own innovative ways of assessment which were learner-centred. These assessment approaches acknowledged and included learners in designing assessment instruments. The ELET officials were encouraged to publish these educators' work and they (ELET officials) also interviewed learners who were exposed to the writing of the communicative assessment approach. The communicative assessment approach of that time could be likened to the current National Curriculum Statement (NCS) and National Protocol Assessment (NPA). Both the NCS and the NPA are currently used in meeting the democratic needs of the education system because of its learner-centredness. This section therefore demonstrates that educators have long been interested in advocating change and innovation even during hard times of oppression and apartheid.

The advent of democracy in South Africa in 1994 brought about many changes in the country. These changes have focused on political, cultural, social, economic as well as educational needs of the people. One of the challenges faced by the new government was to address changes in the field of education. The different education systems were merged into one National Department of Education and Training. The new Department of Education brought with it new policies that were aimed at transforming the education system and ultimately the entire South African society. Amongst the first pieces of legislations and policies to be promulgated were the South African Schools Act (SASA) (Act No 84 of 1996), Employment of Educators Act (Act No 76 of 1998), and Employment Equity Act (Act No 55 of 1998). The Department of Education has instituted a number of policies as part of its transformation agenda. According to the Education Labor Relation Council resolution 8 of 2003 these policies include Integrated Quality Management System (IQMS), Whole School Evaluation (WSE), Developmental Appraisal, and System (DAS) Performance Measurement (PMS) System. This study attempts to capture the understanding of experiences of educators and

management teams of IQMS implementation in Mayville ward. It examines mainly the views of school management teams and post level one educators regarding their experiences of the IQMS implementation.

### **1.3 Statement of Purpose**

The purpose of this study is to examine and document the experiences and voices of school management teams, as well as educators about the IQMS implementation in their respective schools. It is hoped that the study will contribute in deepening the understanding of how schools principals experience the implementation of policy with special reference to IQMS policy.

### **1.4 Background to the study**

The main assumption underpinning this study is that the implementation of the IQMS policy, the way that the Department of Education normally does things, does not follow proper routes of professional development and support as envisaged in the policy. My informal conversations with educators in my school and also in the neighbouring schools revealed a lack of understanding of the purposes and processes of this policy. I have attended a number of workshops organised both by the Department of Education and Non-Governmental Organisations (NGOs) on professional development. I have noticed in all these workshops that the facilitators had difficulties relating the IQMS policy implementation at school level. I have attended a number of presentations where the IQMS was the main topic for discussion. The first presentation took place in my school where I serve as a principal. It was part of the staff professional development programme. The second presentation took place in 2006 at the Ikhwezi Conference and its focus was also on professional development. The third presentation took place at Chatsworth for the South African Principals' Association (SAPA) Conference where all relevant role players such as, teacher unions, principals, NGO's, local and the national Department of Education were

represented. In all these workshops, the main theme was quality measurement as part of professional development programme. The IQMS focuses on continuous development and maintenance of quality by attempting to continuously check on how much more development is needed by an employee. The IQMS document refers back to the terms used in the interview instrument. The IQMS document requires that during the implementation stage the level of performance should be measured for the future development purposes.

Central to the IQMS policy is the question of monitoring the teaching staff while carrying out their professional duties and tasks. There is empirical evidence to suggest that teachers do not like to be supervised by their superiors, particularly school principals. To cite just one example, there was a study that was done by Bhengu (1999) among both primary and secondary schools in the Inanda and KwaMashu areas. In that study educators declared categorically that they did not want their work to be checked by principals, and also that they did not want to be observed by their principals when teaching. One of the reasons these educators cited was that principals were not qualified to check their work and also that being observed reminded them of the apartheid era class visits by school principals (Bhengu, 1999). The IQMS democratically allows an educator to be involved in the assessment process by being required to score himself/ herself. Furthermore, they are also allowed to appoint a peer to assess their performance standards. It stands to reason that something needs to be done about the situation where educators detest their work being monitored to assure quality.

The purpose of the Whole School Evaluation is to evaluate the overall effectiveness of schools and the quality of teaching and learning. The purpose of Performance Measurement is to evaluate individual educators for salary progression purposes, affirmation of appointment, grade progression, rewards and incentives. The purpose of Developmental Appraisal is to appraise individual educators in a transparent manner to determine areas of strength and weakness for the planning of individual developmental programmes. The above-mentioned

programmes were subsequently integrated to one policy called IQMS. Such a policy was adopted after an agreement was reached between the employer and the employees (Resolution 8 of 2003). Before the IQMS was implemented, difficulties around the implementation of DAS and WSE had been experienced in many schools. For example, Bhengu (2005, p.104) in his study of experiences of rural principals mentions a number of issues that were of concern to the principals. One of those concerns by principals was that many policies remained unimplemented. Such policies included DAS and WSE. Although his research was not based on IQMS and Whole School Evaluation (WSE), the principals did raise their concerns on the WSE, which is part of IQMS.

What emerges quite strongly is that, like other policies before it, the IQMS has yet not been implemented in terms of the document's specifications. The formulation of IQMS occurred within the backdrop of DAS and WSE having not been properly implemented. Instead, DAS and WSE were integrated into Quality Measurements System, and then referred to as the Integrated Quality Measurement System (IQMS). This idea of the disjuncture between policy formulation and policy implementation has been widely talked about. For example Duncan Hindle (Sunday Times, February, 2006) complains about the fact that during the peers' evaluation stage, teachers gave their peers good scores that do not match their actual performance. The Sunday Times (February, 2006) raises similar concerns about the rating instrument for evaluation. It attributes that discrepancy to inadequate training that educators receive. Thus according to the Sunday Times, each school ends up implementing policy according to their own interpretations, which may not necessarily be in line with the intentions and aims of the policy. Lubisi (2006), KwaZulu-Natal's Department of Education Central Executive Officer (CEO), feels that the IQMS aberrations can be effectively addressed if the Department of Education works collaboratively with teacher unions. Like Hindle (Sunday Times, February, 2006) Naledi Pandor (Minister of Education at national level) also had some concerns about high scores that educators give one another (through the unmonitored peer review

process). Such high scores do not correspond with the performance of schools, (Daily News, February, 2006).

I am a school principal and as such, am one of the recipients of these policies and I have observed that there are a number of shortcomings in the implementation of the IQMS policy. The Heads of Departments (HOD's) are supposed to be part of the Development Support Group (DSG) panels in schools. Such a process involves assessing and evaluating educators in class, and it takes a lot of their time that could be devoted to other school activities. There is a lot of paper work and it is time consuming. The HODs, as part of the School Management Team, also participate in the Staff Development Team (SDT). After each and every evaluation session the SDT collates information gathered by the DSG, identifies development areas of the appraised member of staff. The HOD, as part of SDT work, then helps design a developmental programme for the whole school. However, such programmes become problematic when wrong scores are given as such practices undermine accuracy in terms identifying areas for development.

### **1.5 Significance of the study**

The findings of this study will be useful for school principals, particularly in terms of deepening their understanding of the IQMS policy implementation. The research will provide them with a platform to reflect and interrogate their own practices. The participants will grow through the experience and practical involvement in research and they will gain some insights into different perspectives through their engagement with the data production process. The Department of Education officials at a ward and circuit levels will gain some understanding about how Mayville schools are grappling with challenges posed by the implementation of IQMS. The study will also enhance the insights of all relevant stakeholders regarding IQMS policy intentions and processes and how the IQMS concept links up with the principles of life long learning.

## **1.6 Critical questions**

The study was guided by the following critical questions:

- How have schools in Mayville Ward experienced the process of Integrated Quality Management System implementation?
- What are schools' understandings of the purposes and processes of the IQMS?
- What do schools think needs to be done to enhance Integrated Quality Management System implementation?

## **1.7 Lay out of the study**

The study is divided into five chapters and each chapter deals with a different aspect of the research process.

### **Chapter One**

This chapter presents the context of the study. It includes the introduction, statement of purpose, rationale, critical questions, layout of chapters and conclusion.

### **Chapter Two**

This chapter presents the literature review on issues of management of quality and different models of quality management. The theoretical framework guiding the study is also contained in this chapter.

### **Chapter Three**

The research design and methodology used in carrying out the study is presented. Included in this section are approaches that were used to analyse the empirical data that was produced.

**Chapter Four**

Chapter four presents the data produced as well as some initial analysis of the data.

**Chapter Five**

This chapter presents, discusses and analyses the findings that emerge from the data and also makes recommendations.

**1.8 Conclusion**

In this chapter the orientation to the study was made by presenting a detailed background to the study, the significance of the study, the rationale for the study to be undertaken, as well as the critical questions guiding the study. The lay out of the study was presented towards the end of the chapter. Chapter two focuses on the relevant literature and also presents theoretical and conceptual frameworks through which the problem of IQMS can be analysed and understood.

## CHAPTER 2

### LITERATURE REVIEW AND CONCEPTUAL FRAMEWORK

#### 2.1 Introduction

This chapter presents the literature and discusses the conceptual and theoretical frameworks that throw some light on the problem being investigated. Reviewing the literature also assists in developing a framework for giving clarity to the Integrated Quality Management System for quality performance management in education. The chapter begins by discussing the concept 'quality' as one of the key concepts underlying the whole study which is about quality and measures that are used to assure quality in the school system. The next concept that is discussed is 'participative decision-making'. This concept is also very important because one of the key principles used in the IQMS policy is the inclusivity of the process so that it can be owned by the people for whom it is meant. The discussion of the two concepts is followed by the discussion of two theories that are crucial to the understanding of IQMS, and the two theories are Quality of Work Life Theory (QWL) and Collective Fingers Theory (CFT). The chapter ends with the discussion of the research projects that have been undertaken in South Africa and abroad.

#### 2.2 The Concept Quality

The concept quality can be understood and defined in many ways. Greenwood and Gaunt (1994, p.13) define quality in education as:

*the continuous improvement of systems to enable the optimum state of personal, social, physical, and intellectual development of each individual which will result in society and colleague loyalty now and then.*

Sallies (1996) uses the image of customers and services rendered to them as a way of explaining what quality is. According to this explanation, quality does not

only refer to education experiences but is also reflected in the business world where customer satisfaction is the main focus. Reference is made to the two phrases associated with business discourses, *quality* service and *quality* product. In that sense, quality has become a rubric for products and services that are of high status. Nelson and Quick (2000) have added three guiding questions in quality evaluation. These questions check whether or not the policy idea improves customer response; whether or not it accelerates results and whether it raises the effectiveness of resources within the organisation. Nelson and Quick (2000) further argue that If the answer to the policy idea being asked above is affirmative, that will mean that the idea should be implemented and that it qualifies to improve the total quality. In short, Nelson and Quick's (2000) argument is that if the policy idea being proposed will meet the customer satisfaction, and also if the idea will improve the results, then it will be implemented.

### **2.3 Participative decision-making**

Participative decision-making is when decisions made affect certain individuals and the same individuals are being made influential upon the formulation and implementation of those decisions (Lawler, Mohnrman & Ledford, 1992). According to Nelson and Quick (2000, pp. 328-329), an organisation's 'foundations for empowerment' includes a participative, supportive organisational culture and a team-oriented work design. According to these authors, there are three prerequisites for participation and empowerment, namely, the capability to become psychologically involved in participative activities; the motivation to act autonomously, and the capacity to see the relevance of participation for ones own well being. In this particular view, employees are not expected to participate in all decisions that employers make, as it may be unlikely that all the three prerequisites will be met for all decision to be made.

Participative decision making is complex. One of the things that managers need

to understand is that employees can be involved in some of the stages of decision-making. Nelson and Quick (2000) further assert that decision-making process involves identifying problems, generating alternatives, selecting solutions from the generated alternatives and evaluating the results. For example, in the IQMS process at school level, educators could be involved in various stages of decision-making process such as identifying problems, generating alternatives, selecting solutions from the alternatives, planning the implementation and, evaluating the results. This occurs mainly when educators identify areas of professional development in their Personal Growth Plan (PGP). After identifying the PGP, the individual educators' PGPs are combined to form the School Improvement Plan (SIP). In that way educators become part of the decision-making in the IQMS process for the whole school development. Research conducted by Nelson and Quick (2000) showed that participative decision-making is an effective approach in a productive organisation. These writers also discuss different styles of participation in decision-making.

## **2.4 Quality of Work Life Theory (QWL)**

According to Van Fleet (1999, p. 442), Quality of Work Life is the degree to which members of a work organisation are able to satisfy important personal needs through their experience in the organisation. The Quality of Work Life Theory advocates a "shift of a paradigm" in thinking and ways of doing things, particularly when it comes to moving the focus from employer to employee as mentioned in chapter one of this thesis. Van der Westhuizen (2002) regards Quality of Work Life as humanisation of work, improvement of working conditions, scientific organisation of labour, workers protection and democratisation of work. The QWL is defined as "a programme or process by which an organisation responds to the dignity and needs of employees and develops mechanisms to allow employees to share fully in making the decisions that design their lives in the workplace" (Steenkamp, 2004, p. 90). It focuses on productivity and highlights the value of human resource utilisation in the

performance process (Schermerhorn, Hunt & Osborn, 1991). There seems to be a general agreement that QWL is about the quality of life and subjective well-being of employees (Diener & Rahtz, 1999; Sammons, Day, Kington, Gu, Stobart & Smees, 2007). The Quality of Work Life entails participative management of the organisation's goals. Management as employer, and workers as employees, play a major role in organisational decision-making. These ideas are consistent with those held by the above-mentioned researchers. I became interested in the QWL theory, because of its influence in terms of quality that should be reflected in the work life situation. Quality, in terms of the new IQMS policy, plays a major role in the new vision for education in South African schools today, and it is the responsibility of all role-players in a learning organisation to ensure quality. My role as a manager in an organisation dedicated to learning has also stimulated my interest in issues of quality.

Furthermore, the QWL theory has got some links to this study because it requires that employees in an organisation need to be involved in decision-making and policy formulation. Working in this way, that is, involving all relevant role-players shows the value of this theory. I have chosen this particular theory because of its usefulness in bringing together all role-players in a learning organisation such as a school, and its usefulness in addressing my research questions. The QWL, as defined by Schermerhorn, Hunt and Osborn, (1991), van der Westhuizen (2002), Steenkamp, (2004) and others, has shed some light on the study's research questions. These questions attempt to solicit some understanding of Mayville schools' experiences of the IQMS policy in terms of purposes and processes, as well as how its implementation can be enhanced.

The following discussion deals with the way that Van Fleet (1999) and Steenkamp (2004) link their understanding of quality to the Quality of Work Life. These authors consider dedication to quality and excellence as more than just good business but as a way of life, in other words, it is about 'giving something back to society'; 'offering your best to others'. The industry, according to

Steenkamp (2004, p. ix) marries the Total Quality Management (TQM) with Quality of Work Life. The TQM is considered as a tool and a vehicle to obtain excellence in organisations. Excellence is beyond the basic standard, beyond quality and is the result of caring more than others may think wise. Excellence results when management goes beyond what is expected and when they do the job right (Steenkamp, 2004). Townsend (cited in Clarke, 2007) regards excellence as being far more important that principals and educators take pleasure in their work. There must be excellence in total care, occupational safety and human resources. Ultimately however, it requires a culture shift to take place towards the philosophy of work and productivity.

Quality is in the public domain and is not bound to culture. In fact, quality of life is a generic need as is seen in the human rights entrenched in the South African Constitution. The TQM is therefore a necessity for anyone in any industry, as management cannot expect high quality and productivity if the work environment is not also of a high standard (Van Fleet, 1999). This is one dimension of Quality of Work Life that directly affects the quality of human capital. According to Van Fleet (1999, p. 442), QWL programmes on a large scale for organisations were developed to focus on the adaptation of tasks and work to the employees, and in turn, the employees adapting to their work. Ultimately, such a relationship becomes a way of life that employees enjoy and they regard it as quality life style, it becomes productive (van der Westhuizen, 2002). The paradigm shift of the above nature worked for large-scale organisations in the 1970's. The author reflects that these programmes were used in times of difficulty when organisations faced challenging economic conditions.

Quality Work Life programmes were designed in a way that clearly defined the partiality of Quality of Work Life implementation in an organisation. Looking at the sources of Quality of Work Life in an organisation and Steenkamp (2004, p. 54) mentions seven elements determining a person's Quality of Work of which I have selected six for my study because their relevance for my study. These include

the social relevance of the job'; participation in the structuring of the work; safe and healthy work conditions; development of human resources; security and continued growth as well as, the social interaction and integration in the work place like allowing the employee to fit into the organisation culture.

There is no just one way of looking at the practical application of the QWL theory to organisations. Many authors, Van Fleet (1999), van der Westhuizen, 2002 and Steenkamp (2004), to cite just a few, have similar views regarding the way they look at the practical application of Quality of Work Life theory in an organisation. Notwithstanding these similarities, they differ slightly in the way they use terminology, but essentially the angle of approach has the same influence. Steenkamp (2004) goes further with his observation that reflects on the practical side to Quality of Work Life by referring to a number of high-performing organisations focusing on five extraordinary Quality of Work Life elements.

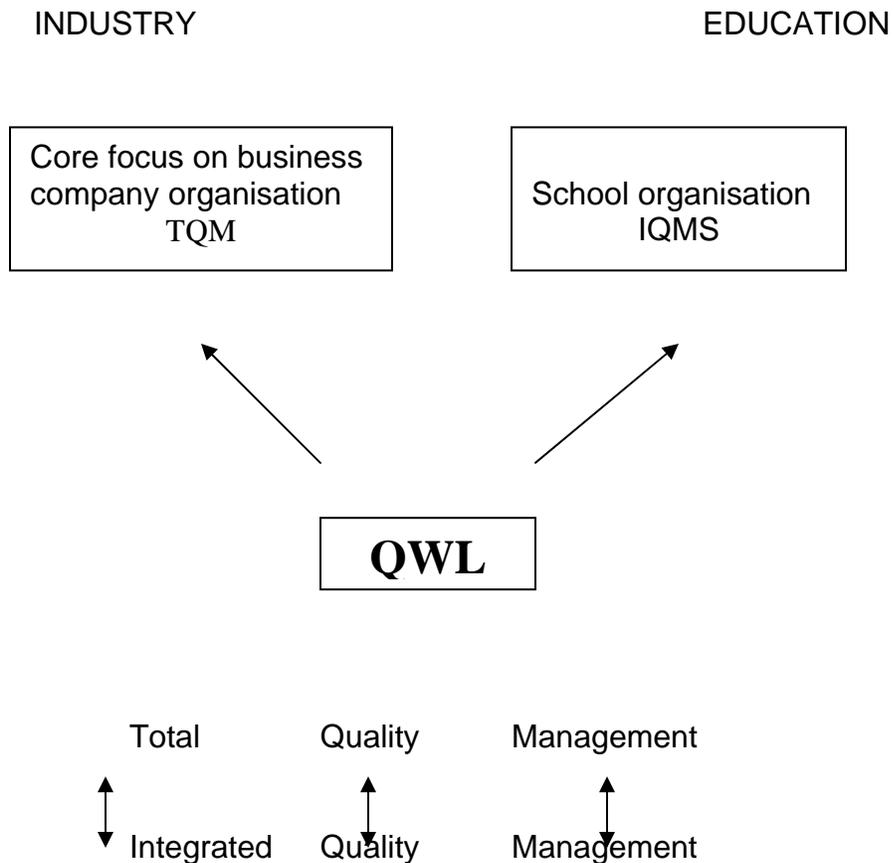
#### **2.4.1 Quality of Work Life Theory and the IQMS**

The linkage between the Quality of Work Life and the IQMS is not a direct one. For some time the Total Quality Management (TQM) has been linked and applied to the education sector despite its origin in the business sector. The QWL theory is linked to the TQM theory and it is the researcher's view that the IQMS policy can be regarded as the education version of the TQM due to its close resemblance. There is therefore a triangular relationship between Quality of Work Life Theory, the Total Quality Management and the Integrated Quality Management System. In this triangle, the QWL theory provides a theoretical frame to understand both the TQM in the industry and the IQMS in education. Thus the QWL becomes the instrument that can be used to measure quality of work life in education, as well as, the understanding of how quality of life can influence the manager's attitude to quality and quality assurance measures. In arguing for linkages between the QWL and TQM, Steenkamp (2004, pp. 115-116) makes reference to a number of financial publications, such as the London

Financial Times, Financial Mail, Business Report. It is in these publications as well as several others where many companies are reported as being highly performing due to influence of the QWL approach.

The IQMS is about measuring educators' performance (Resolution 8 of 2003). It emphasises a quality management system and it integrates two approaches to professional development. In attempting to link the QWL theory with the IQMS my analysis connects each word in this theory with what it symbolises in the IQMS policy. In terms of this analysis, I consider 'work' (in the QWL) to stand for the IQMS policy to be performed by educators. In a school environment educators need to show quality in carrying their daily duties. 'Life' (in the QWL) is viewed as a system to be adapted by educators in school environment and be able to link their normal lives with their daily performance at school. Quality of Work Life is therefore trying to highlight the view that the employer or the principal in the case of the school, need not come with a ready-made system to impose on employees, but that the system needs to be part of the formulation and grow with them as theirs.

The Quality of Work Life theory has become vogue during the time of transition and transformation of the South African society where such values enshrined in this particular theory are relevant to the period in history. The drawing below illustrates the relationship I have described above between the IQMS, TQM and QWL theory.



The above model shows the relationship in the study between the approaches taken to TQM in the context of industry and to IQMS within the school, through the application of the theory of QWL to school life.

I am therefore convinced that if our schools were to be run like businesses, as this drawing indicates, this theory would have more relevance in assisting in this study. Such evidence has been produced in business sectors in South Africa. Moreover this theory is found among the more highly related quality management theories worldwide. It is relevant to my study as it would be of great advantage in South Africa because by applying it our schools could easily connect to the global standards of education quality.

## **2.5 Collective Fingers Theory (CFT)**

Collective Fingers Theory (CFT) is the second theory that I have found to be relevant for this study after Quality of Work Life theory. According to Mbigi (2005, p.105) the managerial lesson flowing from this theory is training and development leading to collective action. They should be collective in approach and practise for training to move from collective talk to collective action. It will need to harness the collective energy and support of the key players in the organisation (Mbigi, 2005). That means one needs to open collective forums, which are inclusive in nature and must, as far as possible include everybody in the organisation.

The Collective Fingers Theory is made up of five collective essences of Ubuntu – respect, dignity, solidarity, compassion and survival. Ubuntu is the whole hand. These essences are very important in understanding the extent to which school managers' quality assurance measures are motivated by the belief in providing professional support to the subordinates.

### **2.5.1 Five Collective Essence of Ubuntu**

The fingers represent the five collective essences of *uBuntu*. The concept of uBuntu is a concept that has now been widely written about. At its basis is the African philosophy of humaneness (van der Westhuizen, 2002; Steenkamp, 2004; Broodryk, 2005). The Collective Fingers Theory uses the metaphor of a hand with five fingers where the palm represents the organisation. The fingers represent the five values of respect, human dignity, solidarity, compassion and survival.

The first value is respect, and respect forms part of one hand as the biggest finger that has got a duty to perform. The rest of the fingers accompany the biggest finger collectively with the spirit of respect. The IQMS policy implementation also needs respect by all stakeholders without any form of

discrimination. The second one is human dignity. Human dignity is one of the aspects highly recognised in South Africa. Dignity is considered as second, and therefore, it is expected in the IQMS collective agreement. The third is solidarity, and this value is represented by a middle finger in the Collective Fingers Theory. Its one of the essences used by unions and is referred to as the spirit of solidarity. It can be argued that the same spirit can and should form part of the IQMS policy implementation for it to succeed. Compassion is the fourth value and is represented by the finger between the long and smallest finger. It represents compassion as a requirement in a collective agreement between the employer and the employee. Compassion can also serve in the IQMS formulation and its implementation process by schools. Lastly, is the value survival, represented by the smallest finger in the hand. The IQMS policy implementation can easily be interpreted to be meant to give hope to all stakeholders in and around schools about the schools' prospects of survival in the midst of all the disturbances and uncertainties in the outside environment. Employees should feel that survival is part of the process.

### **2.5.2 Collective Fingers Theory – expectations and experiences**

Collective Fingers Theory according to Mbigi (2005) has five phases, and these phases are briefly discussed in the next five paragraphs.

Phase one entails the view that change training must be undertaken. Such a training must be residential and offsite for three to five days. The creation and development of learning should be allowed within the specified time. Furthermore change training should be led by an outsider as a latter-day soothsayer. Change training should focus on a converging survival theme, and also allow space for other core issues for people to grapple with their own personal shadows, including the ceremonial aspects, which are to be treated as factual aspects. Mbigi, (2005) goes on to elaborate that participants want a personal connection and a personal touch. They are looking not for facts only, but also for personal

intimacy, sincerity, simplicity and development. The strategic “bosberaad” should take three to five days, and the total African evening in both its content and processes incorporates music and an African evening function with spouses. An outside expert should tell a survival topic story, but not take longer than an hour.

Phase two maintains that union members of the organisation including the person who told the story about the survival theme should be included. The next phase includes the whole organisation in the form of inclusive strategic forums. The facilitator’s approach should be a bonding one. At this level the incorporation of the participants must be multilevel, cross functional and multiracial in order to lead to collective action. The fourth phase is meant to help the organisation to build the capacity and skills required. The organisation should take a participative skills audit without suspicion. The organisation should also consider individual training and development plans to be drawn up. Mentoring and doing are referred to as traditional approaches with more emphasis on practical action and close, trusting and helpful relationships with the mentors in terms of coaching and interpersonal skills. The ceremonial and ritual aspects of the relationship facilitate the bonding process.

The fifth and the last phase, involves the training of a trainer for self-empowerment and the authoring of one’s own destiny. This will help people to mobilise resources and people around them on their learning process or journey. Organisational achievement as a whole should be celebrated as part of quality production. Spouses are to be included. The daily events are to be punctuated by short speeches, music, food and entertainment. A Western rigid, formal and unemotional approach should be avoided because it tends to be dull and meaningless to those who are unaccustomed to it. The five phases base the developmental process on the cultural basics of the employees. The phases do not form different worlds of the individual culture and the organisational culture. The treatment one gets at home should not be different from that one gets at work, insofar as human dignity ought to be treated with respect.

Steenkamp (2004) goes on to emphasise the rainbow vision as part of the organisational culture and leadership style. According to Mbigi (2005, p.11) as cited in Steenkamp (2004, p. 138) readers are reminded that in South Africa, with its strong Western influence, there may be many people of African origin who show few of the truly African characteristics, as they may be closely aligned to a Western style of business leadership. The belief is that people's cultural roots define their existence in spite of exposure to other cultural influences. The question remains; what are the cultural roots that define African-ness?

Steenkamp continues with his citation in the same page, when Du Plessis (1995, pp. 3-4) concludes that, being human states that in traditional African cultures the human being is placed at the centre of their worldviews. Human life is important, and nothing more than that. The African term that refers to that is called Ubuntu. The very word 'uBuntu' suggests no differentiation between people. In uBuntu violence and greed are frowned upon as currently manifested. Du Plessis (1995, p.7) compares the Asian concept with African communalism. African communalism with regard to the concept of uBuntu encompasses the notion that a person is nothing without a group. The individual is not more important than his/her peers. The above has two implications of life in general, and for business in particular. In the African context consensus and participative decision is taken by a group. In the Asian concept this is referred to as quality circles.

Different writers and managers have developed the uBuntu style of management. They have also adopted it as a philosophy in managing their organisations. It is recommended as one of the best if it comes to the highly productive systems in the World. Let us look at how one of the writers may present his version with a comparison to the Western style of management.

### 2.5.3 Collective Fingers Theory and understanding IQMS study

The IQMS is meant for educator's performance measurement and professional development. Collective Fingers Theory has a certain level of relevance to this study. To start with the term 'collective' is used in this theory to encourage the spirit of doing things together. That is the same as the IQMS collective agreement for its implementation and quality management processes.

The three styles of quality management are human resource, time management and rewards. These rewards can take the form of recognition or incentives. The IQMS considers these styles in managing and developing quality in schools. Broodryk (2005, pp.208- 209) compares Western and African management styles. I have considered the comparison of the above management styles in my study in order to observe how both affect quality management in an organisation. These management styles consider cultural behaviours of employer and employee in Western and African countries. The qualities of Western and African cultures are inclusive in the IQMS.

Broodryk (2005, pp.221-222) in the Ubuntu Management Behaviour (UBM) is counting virtues that contribute towards quality management in an organisation. These include *integrity good faith, impartiality, openness, accountability, justice, respect, generosity and leadership*. Broodryk (2005) has designed a pledge based on the above virtues for employees to commit themselves to UBM for quality management. The above virtues have relevance to my study because of its emphasis on quality, measurement and maintenance of quality.. Clearly if educators are honest, accountable, act in good faith and demonstrate integrity in their practice less complaints about accuracy of scores during the IQMS process would be made. The qualities of UBM are said to have positively contributed in most big companies. That can be the case in schools and IQMS implementation as well.

## **2.6 Research conducted in the field**

There is now a growing body of knowledge in the field of quality assurance, quality development and maintenance. In the following section my discussion draws mainly from the South African situation as a way of indicating the topicality of the quality assurance issue.

### **2.6.1 The South African context**

This section discusses studies on teacher assessments that were conducted within the country, and in a way projects a story about the context in South Africa. These two studies illustrate some of the concerns of the researchers who conducted these studies with regards to the issues of management of quality and different models of quality management. Comparisons are drawn between these two studies with a view to using the insights gained from them in informing and shaping this study. The insights gleaned from these studies will be helpful in addressing the following questions: How was it done? What was its purpose? What were its findings? How can the findings in these studies help to broaden the understanding of different dimensions of the problem presented in this study?

The first study was conducted by Hibbers (2006) in the province of KwaZulu-Natal and it was undertaken by the National Department of Education. The methodology that was used to carry out that study included both qualitative and quantitative approaches to research. The qualitative research aspect included historical methods, phenomenological approach, unstructured in-depth interviews with principals and educator's, and focused group discussions with principals and educators. The quantitative aspect included survey questionnaires which were administered to hundreds of principals and educators during the workshop sessions and also during principals' meetings. The purpose was to ascertain the extent to which the IQMS had contributed to improving education performance of educators.

The findings were positive in that most of the responses indicated that when educators understood the purposes and processes of the IQMS and when their attitudes were positive, their performance improved as well. In other words, positive attitudes by educators towards the quality assurance measures as articulated in the IQMS influence their teaching practice. And when there was improvement in teaching and learning, learners also learned better and performed better. The findings were that IQMS had a positive impact on the perceived educator's performance. The findings of this study helped me understand that when educators understand the purpose of the policy they implemented it. I also learned that when the educators' performance improved, learner achievement improved as well.

The second study was also done in 2003 in the province of KwaZulu-Natal by the national Department of Education. Its findings were presented in the Education Labour Relations Council. The study was conducted with a population of 74 422 educators in the KwaZulu-Natal Department of Education. The stratified random sampling technique was used. The population was divided into different strata made up of eight regions. The sample was structured in such a way that both remote rural and urban schools were included. Approximately 100 questionnaires were sent to educators in each of the eight regions. Members of the School Governing Bodies were included in the sample. Sixteen chairpersons and other members of the governing bodies were interviewed. The four Departmental officials involved with quality initiatives were interviewed. Governing body chairpersons and members were interviewed to establish whether they were aware that it was their duty to institute quality at schools and what they believed were the prospects for the introduction of Total Quality Management at their schools. The Departmental officials were interviewed to establish the extent of success that the Department was currently enjoying in the introduction of quality initiatives such as Developmental Appraisal System (DAS) for educators and Whole School Evaluation (WSE). Interviews and questionnaires were conducted.

A broad overview of the techniques involved in the statistical analyses of data was provided.

It has been established that the public schooling system faces huge challenges and these challenges are: The fact that public resources were limited; a need was identified for new and improved ways of doing things. A need to start emphasising concepts such as productivity and quality in education; A need to strive to continuously get more out of a given set of resources. The study intended to explore the prospects that Total Quality Management offers for the introduction of quality and improved service delivery to meet customer's expectations and delivery to meet customer's expectations and needs.

The findings of the study were based on experience of 40 educators who commenced teaching during the post- apartheid era. The newly trained educators would have been trained in the latest teaching methodologies. Training in Outcomes Based Education (OBE) and technology education were aimed at addressing issues of equity and quality. There was a bulk of the sample with over 15 years teaching experience. That is the point where educators could be reasonably classified as experienced and it helped to increase the reliability of the observations on quality in education.

It was concluded that quality was not significantly dependent on the material position of the school. The myth that quality costs money was dispelled. Educator's qualifications were vital ingredients to ensure the successful implementing of TQM. Levels of satisfaction with the Public Service and delivery the perception of the effective and efficient provision of service tends more to the negative. That reveals that the public was aware of the quality of service that they should, but were not receiving. There was a strong case for urgent public sector reform in South Africa so that public servants can deliver in terms of the principles of Batho Pele.

A number of obstacles to achieving quality were identified and these were ranked in terms of their perceived role in creating obstacles to quality development and maintenance. The first obstacle identified was a lack of support from the Education Department, the second one was learner attitude towards schooling generally, and the third one was a lack of parental care. The fourth obstacle was identified as inadequate learning resources in schools; the fifth was poor physical environment. Surprisingly for me was the sixth obstacle, namely, teacher union activity. I certainly did not expect teacher union activities to be regarded as an obstacle to maintaining quality, especially because unions claim to adhere to the maintenance of quality. Such perceived behaviours by educators are contrary to Mbigi (2005) conception of collaboration of all key stakeholders in maintaining education quality. The next obstacle identified was poor leadership and communication between the principals and members of the school management Team on one hand and between the School Management Team and educators on the other hand. This obstacle was also a surprise for me because my thinking was that this issue should have occupied a much higher position in the ranking. The last three positions were occupied respectively by poorly qualified educators, schools' lack of vision and mission statements and poor monitoring and evaluation of learner performances.

The findings on this study helped me to gain more insight to my own study in different ways. It has touched on a variety of issues especial those hindering quality in the education system. The hindrances have been put in the perceived experiential sequence from the most problematic down to the least problematic. Most of the findings have direct linkages with my study, especially in terms of findings which I am presenting in chapter five. It has proved to me that my investigation was on the right track in terms of data collection. This study has confirmed for me that schools have a problem with quality and policy implementation. The findings clearly indicate that quality is not maintained by money or cost but by other issues. South Africans know about quality and they can distinguish between schools where in their views there is no quality or low

quality education being provided and schools where there is high quality education.

## **2.7 International Context**

Two research projects are discussed under this sub-heading, namely the studies conducted in Mexico and the United States of America.

### **2.7.1 Mexican Context**

Other countries have conducted studies on issues of quality assurance, namely, developing and maintaining quality in organisations. Two studies with an international context are discussed, one is a study conducted in Mexico and the second one was done in the United States of America (USA). The studies that were done outside South Africa on the assessment of educators, link professional development as well as the incentive for educator performance in schools. The first study I discuss was done in Mexico. I have chosen Mexico because it is one of the developing countries from which we as South African educational leadership researchers and practitioners can learn. This study was conducted by Santibang, Martinez, Datar, McEwang, Setodji and Basurto-Davila (2007). That study was about quality education that was deemed a factor in competitiveness. In order to compete globally, Mexico attempted to raise its standards beyond its current low achievement.

Several innovations at federal and state levels have been developed to raise the quality of basic education. An example is Carrera Magisterial, which is a professional development programme that was created as part of the National Agreement for the Modernisation of Basic Education in 1992. This programme was aimed at raising the quality of basic education through teacher's professional training, new learning presence in schools and improving working conditions. This Carrera Magisterial programme has had a positive impact on learning achievements, particularly in rural areas and teachers' pedagogical behaviour is

of great importance when grading learning achievement.

The methodology and data collection techniques were both quantitative and qualitative. The purpose of this study was to prepare for the signing the national agreement and for the modernisation of basic education to respond the teacher professional development and performance and incentives. The re-evaluation of teaching activities was to improve welfare of the teachers through better salaries and housing policies.

Additional work is needed to establish the linkage between initial education, parents' participation and learning achievement. Nonetheless, the results show that the development of self-driven and studious students, who seek information beyond their textbooks, is a key factor in increased learning achievement. Teacher's pedagogical behaviour, efforts and performance in the classroom, is of great importance when grading learning achievement. The impact of this factor is many times larger than the impact of other school factor such as didactic material available to the teacher. Students learn better when they are taught by teachers who teach clearly, who have a thorough knowledge of subject matter. No tradition exists in general for encouraging activities of learning, managing group work, developing locally relevant materials, or adapting lessons to teach problem solving questions. Teacher's performance is measured by learners' performance in terms of scores. It involves parent's contributions towards work such as to develop good learning habits and motivation among students should challenge not only to teachers but to parents.

### **2.7.2 The United States Context**

The second study was conducted in the United States of America (USA) as I have mentioned before. It is important to learn and perhaps understand that problems and challenges we grapple with in the developing countries are also experienced in the developed countries such as USA. This study like the one

conducted in Mexico makes connections between teacher performance incentives and student outcomes. Although the merit pay systems have been established in many school districts across the United States, little empirical evidence exists concerning their influence on student achievement. This study done by Ellett and Teddie (2003) is a case study on high schools which maintained a traditional compensation system, A different analysis implies that merit pay increased retention, had no effect on grade point averages, reduced average daily attendance rates, and increased the percentage of students who failed. Urban schools in the USA are the worst performers. Merit pay plans have been implemented in many places, the concept has been around for many years. Yet, there is surprisingly little evidence of their effectiveness in raising achievements. The impact of incentive programmes on student achievement was minimal because the Department of Education did not achieve improvement in terms of both teacher performance and learners achievement. Teachers are paid a base wage for each 60-minute class that they teach. The basic wage depended solely on their educational attainment, with a master degree to receive a five percentage higher base pay than teachers with a bachelor's degree. The merit pay system offers two supplements that may be earned to supplement basic pay. The bonus is the same for all teachers, no matter what their educational background, and it is 12.5 percent for base teachers with bachelor's degrees and twelve percent for those with a master's degree. The second supplement is based on student evaluations; Students rate the following 15 factors on a -5 scale.

There are a number of lessons one can draw from the US study in particular. Firstly, teachers' performance is measured against learners' performance in terms of scores. The scores learners get are compared to the teachers' scores. Secondly, parents are involved by contributing towards developing good learning habits and motivating learners or students. In this way, maintaining quality of teaching and learning becomes a shared responsibility between teachers and parents. Surely the scenario obtaining in the US system whereby parents are

actively and formally involved in the assessment of both teachers and learners is quite different from the situation in South Africa. Nevertheless, there are similarities as well between the US and the South African system. One of them is merit pay that is considered as an incentive for maintaining a quality teaching and learning situation in schools.

## **2.8 Conclusion**

In this chapter I discussed both local and international research projects as well as other literature on the area of quality assurance. I have also discussed key concepts that are pertinent to this study, and that is, the concept 'quality' and the theories such as Quality of Work Life and Five Finger Theory. The two theories are quite relevant for understanding the IQMS at a theoretical level. Reviewing literature also assists in developing a framework for analysis. The next chapter presents the research design and methodology that was adopted in carrying out my study, as well as, the motivation for using such a design and methodology.

## **CHAPTER 3**

### **RESEARCH DESIGN AND METHODOLOGY**

#### **3.1 Introduction**

The chapter outlines the design that was adopted as well as the methodology used in producing data that helped me in addressing my critical questions. It works as a compass in directing the whole study where the rest of the participants and other role players are ethically guided.

#### **3.2 Research Design**

Before discussing design and methodology it is important to briefly discuss what is meant by the two terms. To discuss design, I have drawn from Gough's conception of design. According to Gough (2000, cited in Bhengu, 2005, p. 59.), research design may be regarded as 'a pattern', 'order' or 'arrangement' of all the activities in the research journey. Schumacher and McMillan (1993, p.31, cited in Bhengu, 2005, p. 59) maintains that research design is a plan or structure of the investigation that is used to obtain evidence to answer research questions. In short research design describes the steps one has to follow in conducting his or her study. Questions such as when, whom, where and how, should guide the data collecting methods. Critical questions of a study should be born in mind in research design and methodology.

The research method that was used was the qualitative research method. According to Denzin and Lincoln, (1992, p.2) qualitative research can be defined as a multi method in focus, involving an interpretive, naturalistic approach to its subject matter. Qualitative methods are used when the researcher aims to understand human phenomena and investigate the meaning that people give to events they experience. Qualitative methodologies share three assumptions, namely, a holistic view; an inductive approach and lastly a naturalistic inquiry.

These three assumptions are discussed in the following paragraph.

A holistic view tries to understand phenomena in their entirety in a bid to understand the person, programme or situation. A holistic view enables the investigation to touch on other areas that may not necessarily be seen as important yet they help provide a complete picture in the collection of data. That means nothing should be left un-attended in terms of information collection process. An inductive approach is where you start with specific observations and move to the development of general patterns that emerges from the study. That is to start with a specific view and end up getting into a bigger picture and find yourself exposed to more data. A naturalistic inquiry simply means that kind of inquiry which aims to understand phenomena in their naturally occurring states. This becomes natural as the investigation takes its course.

I chose a qualitative research methodology because it allows for the use of several research tools such as interviews, observation and use of records (Johnson, 1994, p. 21). I needed to understand principals, HODs as well as post level one educators' perspectives not only on how they understood the IQMS policy but I also wanted to understand how these participants implemented IQMS policy. In order to understand how principals, HODs and educators bring meaning to the IQMS processes, a qualitative research approach was used within the interpretive paradigm. An interpretive framework is relevant for this study. In an interpretive paradigm researchers are inquiring into the way social meaning comes about in discourses and how these discourses are maintained. The interpretive approach believes that the goal of science is to hold steadfastly to the goal of getting it right about reality or multiple realities even if we can never achieve that goal. I believe that the qualitative approach to research ensures and enhances participants' involvement in the whole process of bringing about meaning based on their IQMS implementation experience. It is believed that open interviewing; idiographic descriptions and qualitative data analysis are all ways to capture inside knowledge as part of an interpretivist methodology

(Henning, 2004, pp.19-20). There were nine participants altogether from three different schools. I did individual interviews with each participant during times agreed upon between the participants and me. My first meeting with the participants was two-fold; firstly it was to introduce the study and also to solicit their respective informed consent. The second meeting entailed the actual individual interviews and the third meeting was when I gave each one of the participants the copies of the interview transcriptions for them to comment on my analysis and interpretation of what they had told me. That meeting gave them the opportunity to confirm or recommend removal of some information that they felt was damaging and they did not want to be retained as part of the interview transcript.

### **3.3 Selections of participants**

I used a purposive sampling technique to select schools that would participate in the study. The selected schools were targeted for two main reasons. The first one was that these schools had started implementing the IQMS policy. The second one was that it was easy for me to gain access to them. I interviewed principals, heads of departments and level one educators. The reason for that was to get a balanced view of how schools have experienced the process of IQMS implementation.

### **3.4 Target population**

The research target population was Mayville Ward schools. I have made this selection because I belong to the same ward. Access to the schools was easier because I work with the principals. We shared the same experiences regarding many areas of school management and related issues. They have rendered their service freely in responding to my questions, without fear.

### **3.5 Participants**

The participants of this research were the school management team and one post level one educator. Baker, (1988, p.144) states that a sample is a selected set of element or units drawn from a larger whole of all the elements of the population. A non-probability selection procedure was deliberately used to avoid representing the wider population: it seeks only to represent a particular named sector of the wider population to include or exclude from the study. The researcher had purposefully chosen three schools in this study. The schools chosen have undergone the IQMS training and implementation. The respondents were able to give relevant information regarding IQMS.

### **3.6 Data elicitation procedures**

I used semi-structured individual interviews for all my participants. Producing data using interviews has some obvious practical advantages. They represented an economic way of obtaining data in some way relating to the behavior of large and sometimes scattered populations (Ackroyd, 1981, pp.66-67). Unlike structured interviews that do not allow flexibility and follow-up, semi-structured interviews are appropriate for a study that interrogates the experiences such as this one (Ackroyd, 1981). The interviewer was free to ask questions in whatever way he or she thought appropriate and natural, and in whatever order was felt to be most effective in the circumstances. Both the interviewer and the participants were allowed much greater leeway in asking and answering questions than was the case with the structured interview. Such an interview almost amounted to a conversation. It also allowed the researcher to test out various lines of questioning, try out different ways of phrasing questions, and gauge the tenor of likely replies and so on. In addition to this use the non-standardised interview was very often used when interviewing key personnel in an organisation when richer and fuller material was required. As a researcher I felt this type of interview qualified as the best tool for collecting data because the participants were free to

interact with the researcher without any restrictions.

### **3.7 Recording interview**

All interviews were tape recorded in order to ensure that the record of what was discussed is kept and that it is accurate. Kvale, (1996, p.160) maintains that some of the methods of recording interviews for documentation and later analyses include audiotape recording, note taking and remembering. I also preferred using the tape recorder because it allows the researcher during the interview process, to spend most of their time during the interview process focusing on the free flow of the conversation rather than on taking notes (Kvale, 1996). Notwithstanding this, I also took notes of some of the issues that could not be captured by the tape, for example gestures, body language and other expressions.

### **3.8 Data analysis**

I analysed the data using a qualitative data analysis procedure. No computer programmes were used for this purpose, nor was a third person that was not involved in the data production used in the analysis. Since this is a qualitative study, I did not wait until the process of data production was complete. This is a principle called "Principle of interaction between collection and analysis" (Erlandson, Harris, Skipper and Allen, 1993, p. 114, cited in Oka and Shaw, 2000, p. 10). To ensure trustworthiness of the research I employed strategies advocated by Denzin and Lincoln (1994), that is, credibility, transferability, conformability, and dependability. The units of analysis were the schools and by soliciting information from all the three major components within schools, that is, principals, heads of departments and educators, I also ensured that the information I got from principals could be triangulated.

### **3.9 Ethical Issues**

#### **3.9.1 Informed consent**

I ensured that I obtained informed consent from my participants. I did that by informing them about the purpose of this study. Kvale, (1996, p.112) states that informant consent entails informing the research subjects about the overall purpose of the investigation and the main features of the design, as well as of any possible risks and benefits from participants in the research project.

#### **3.9.2 Voluntary participation**

I informed all my participants that the participation in this research project was voluntary and that they had the right to withdraw their participation at any stage of the research process.

#### **3.9.3 Confidentiality**

Another ethical issue that was taken into consideration was that of confidentiality. Confidentiality implies that private data identifying subjects would not be reported. If there was information that needed to be published identifying the subjects, subjects needed to agree on the release of identifiable information. I ensured that all conversations with my participants were confidential.

#### **3.9.4 Anonymity**

The participants' names were not revealed to anyone; therefore anonymity was guaranteed. Also the names of the schools where the research was conducted remained anonymous.

In reporting the findings of the study I use codes to hide the identities of both the participants and their schools. What follows below are the codes I generated to

hide the names of schools and that of the participants.

School-A

School-B

School-C

School-A	School Principal A (SA-P)	School HOD A (SA- HOD)	School Educator A (SA-Ed)
School-B	School Principal B (SB-P)	School HOD B (SB- HOD)	School Educator B (SB-Ed)
School-C	School Principal C (SC-P)	School HOD C (SC- HOD)	School Educator C (SC-Ed)

### 3.10 Limitations of the study

Only three schools participated in this study out of thirty five schools in the ward. The size of the sample makes it difficult to generalise on the population. Considering that this study did not aim to generalise, it was very important that I provided thick descriptions of each case in order to gain a deeper understanding of the meanings that my participants attach to their practices.

### 3.11 Conclusion

This study provides a fresh look at what is going on in schools with regards to the IQMS and it enables principals and the Department of Education in the province to get an insider view of educators, heads of departments and principals' experiences of the IQMS implementation in schools. Anecdotes about successes or failures of this and other policies will be dealt with in terms of conducting an empirical study about these issues.

## CHAPTER 4

### THE IQMS AT THE GROUNDROOTS: VOICES AND EXPERIENCES

#### 4.1 Introduction

This chapter presents the data that was elicited from interviews I conducted with principals, heads of departments as well as educators regarding their experiences and understanding of the IQMS policy implementation. The data is presented in the form of themes that were generated after transcription, coding as well as data analysis processes. I start by presenting a brief biographical story about each of the three schools and thereafter I list and discuss the emerging themes from the data. It must be noted from the outset that while these schools that participated in this study embraced the IQMS policy their voices about their experiences are not necessarily the same. Similarly, the voices within each school are not the same either.

##### 4.1.1 The context of School-A

School-A is one of the oldest secondary schools that were built during apartheid era for the Indian community in this ward. The school has been in existence for thirty years. When it started operating, it did not admit learners from other racial groups as the apartheid laws of the time prescribed. As such the school was reserved for the Indian learners only. Close to the Indian community, where School-A is located, there is a Black community that was also affected by the Group Areas Act. Despite the existence of the Group Areas Act of that apartheid time, both the Indian and Black communities lived together and thus shared historical experience as neighbours. These shared experiences were of a social, economical, and educational nature and these seemed to bind these two cultural groups together despite apartheid rule of that time. As can be expected, the community lacked many resources and facilities such as sports grounds, shops

and other business structures.

After the democratic elections of 1994 the school became part of one single department of education. The school later benefited from some of the transformation initiatives that followed after the 1994 national elections. New buildings were erected through funding from one of the biggest donor organisations in the world. Learners from the Black community could be enrolled in the school. Now the school is one of the highly respected schools in terms of teacher and learner performance in the area. It is now a multi-racial school with highly qualified male and female staff members. The management of the school is mainly male and of ages ranging from forty five to fifty five years. The principal is an Indian male between forty eight and fifty five years of age. The HOD that participated in the study is also a male between forty five and fifty years of age. The post-level educator that participated in this study was also a male between forty six and fifty years of age.

The learners come from families of different racial and economic backgrounds. The enrolment is between nine hundred and one thousand learners. The staff is made up of thirty one educators including the school management team. The school fees are R600.00 per learner per year. Excursions and other activities are used as part of a strategy for fund raising. The infrastructure is of a satisfactory level. For example the school has administration offices, ablution facility, sufficient floor space terms of classrooms and teaching and learning facilities such as furniture, duplicating machines, photo copying machines, computers, sufficient supply of books and stationery. According to the principal the school has been getting good matric results ranging between 80percent and 100percent. He also claimed that the school has maintained good results in matric even in the new dispensation. The learner racial profile includes both Black and Indians. All Black learners speak IsiZulu as their first language and Indians speak English as their first language and the medium of instruction is English. According to all participants in the school, learners are generally well

behaved and there have been no disciplinary problems experienced in the school.

#### **4.1.2 The context of School-B**

School-B is one of the primary schools in the Mayville Ward. Like School-A, this school has benefited from transformation initiatives of the new government. The school did not exist before 1994 and it only came into existence in the late 1990s. It is a new school that was built through funding from one of the biggest organisations in the world. The school is built in the previously Black dominated sections of Umkhumbane. The school's infrastructure is of an acceptable level, for example, the school has administration offices, ablution facility, sufficient floor space in terms of classrooms and teaching and learning facilities such as furniture, duplicating machines, photo copying machines, computers, sufficient supply of books and stationery. All the learners come from the Black community. The enrolment is between nine hundred and nine hundred and twenty five learners.

My participants were of a mixed gender, unlike in School-A in the previous section. The principal was an Indian male between forty six and fifty five years of age. The HOD was Black and female aged between twenty eight and thirty five years and post-level educator was Indian and female educator aged between forty and forty three years. The staff is mixed with males and females of Indian and Black background. All the learners are IsiZulu first language speakers but the medium of instruction is English. According to all of my participants the learners are well behaved and many stakeholders such as the School Governing Body, the Department of Education and other structures in the community play a role in maintaining discipline at school

The staff complement is twenty two members including the school management team. The main advantage of the school is that it is within the developing

community and another advantage is that it is involved in a newly initiated programme of development.

#### **4.1.3 The context of School-C**

The school is a newly erected secondary school under the new dispensation. It was built in 2001. This is evidenced by the appearance of the infrastructure. Previously schools were made up of plain bricks, without electricity, which could not really reflect current learning institutions. The community consists of both Indians and Blacks but the learners are only Black. According to the principal the school's learner profile is going to change soon to reflect the composition of the community. Like in School-A, there was a domination of male voices among all of my participants. The principal is fairly young compared to those of the other two schools. He is a male aged between thirty four and forty years. The HOD is also a male whose age is between thirty six and forty years, and post-level educator was also a male aged between thirty six and forty years. The school has an enrolment of between seven hundred and nine five and eight hundred learners of boys and girls. The staff is made of twenty six educators including the principal and SMT members. The racial profile consists of Indians and Black males and females.

Like School-A, this school is fenced and there is a security guard at the gate. The principal said that even at night there is security guard. Learners are always kept within the school premises with gates locked all the time. It is observable that the tone of the school is conducive to teaching and learning. There seemed to be a high level of commitment by educators to teaching and learning and fund raising activities. Besides their normal teaching activities, educators have been involved in raising funds to buy computers that are used by the learners to enhance learning and teaching practice. The school is also engaged in the newly designed policy initiatives including IQMS implementation.

## 4.2 The emerging themes from the data

The discussion below focuses on the themes that emerged from the data.

### **“IQMS is good on paper but difficult to implement”**

One of the main themes to emerge from my participants was that the IQMS policy was good and they understood it. However, when it comes to implementing it, it was very difficult. There are different dimensions to the difficulty. One of them is that the instrument that is being used is flawed. This flaw emanates from the view that time allocated to the IQMS process makes it difficult if not impossible for educators to dedicate their time doing their normal duties while at the same time doing IQMS processes. When the educator is observed by the Development Support Group (DSG) while teaching, it is imperative that all parties need to be available for the process to take place. The DSG mainly consists of two components from the staff, namely, a peer educator and an immediate superior. In the case of a post-level one educator, the immediate superior is a learning areas specialist. The learning area specialist is the head of department in the school. The difficulty in this respect is that three parties must be available, that is, they should be free from teaching duties at the time of observations. Secondly, one needs to consider the number of educators who need to undergo the same process and all of them need to be available. Thirdly, the deadlines set by the department of education for the process to be completed make it difficult to balance their commitment to class by all these stakeholders, the paper work involved and also do a thorough job in a satisfactory manner.

One of the principals interviewed complained about disruption that usually happens at school during the IQMS process, particularly during classroom observations by the DSG. This is what this principal had to say:

*“Firstly it is very disruptive because for the IQMS to work we need three staff members to go to class at any given time. When that happens the other classes are left unattended” [SB-P].*

This issue of timing was also raised by the principal of School-C when he was reflecting about the challenges faced by schools in trying to ensure that IQMS process was working. He raised some doubts about educators' commitment to the process and wondered whether or not timing was appropriate. This is what he said:

*"I'm not sure whether the problem is with timing or the mentality of the educators or the people who are in charge of IQMS as a whole but I've not been impressed with the way it has been done; it is quite clear to me that the entire process takes quite a long time"* **[SC-P]**.

The question of the IQMS taking a lot of time to carry out was also expressed by educators. Therefore, it is clear that the fact that this policy is time consuming was not only the view of people tasked with management responsibility but it was the experience of everybody in the schools studied. One the issue of time, one educator commented:

*"Sometimes because of the time table, four teachers are going to be IQMSed in one day. With a staff of 30 teachers and IQMS for one week, it means that during the first period, some classes will be left unattended while their teachers observe teachers who are being IQMSed"* **[SC-Ed]**.

The notion of good intentions of the policy has been expressed by different participants. One of the participants that saw the value of IQMS was the HOD of School-A, who puts it this way:

*"IQMS is an excellent instrument brought on board by the Department of Education. However the effectiveness of the implementation process has flaws"* **[SA-HOD]**.

This notion of the system being flawed is better expressed by the educator of School-B when she said:

*"The educators have to select the people that they want on the DSG, resulting in people selecting friends on the panel. We're not getting quality, the quality is sidelined"* **[B-Ed]**.

According to this educator, the system allowed educators to appoint their friends to act as the Development Support Group, and that in her view, this presented flaws which undermines the policy's good intentions. One of the major challenges of using friends is the perception amongst many of the participants that honesty is lacking among many key stakeholders at school level. On this issue the educator for School-C felt that the appointment of both the Development Support Group (DSG) and School Development Team (SDT) actually undermined the entire purpose of IQMS.

The principal of School-B further explains the other difficulty around implementation which he regards as not being properly done in the sense that it does not seem to serve the purpose. This principal said the following:

*"The Department of Education has not focused on the situation in the school and how the principal is supposed to manage a process which is good in policy but hard to implement in the manner that will benefit the learners and staff" [SB-P].*

The principal of School-A brought another dimension to the discussion of good intentions of IQMS by elaborating on how this policy was meant to equip principals and other personnel within the schools. He gives a detailed account of how he introduced the policy in his school, as well as how all stakeholders were going to benefit from the process but also that it was not to be. He says that:

*"We have followed guidelines that were given to us. The IQMS document outlined the different steps that we had to follow in order to go ahead with the process. The required meetings were held and matters that concerned educators and that were confusing were discussed. We wanted the process to be transparent and we made it clear to all educators that the Integrated Quality Management System is there to help us produce quality education as an end result. This is a developmental process, not a fault-finding process, but to develop individuals, including myself as the principal. Then it could be a success and ultimately the children will benefit*

*from the process” [SA-P].*

The sentiments expressed by the above-mentioned principal were echoed by the HOD of School-B when she outlined how the IQMS could benefit educators by for example: giving them clarity on teaching skills as well. This participant was very passionate about teaching and the role that the IQMS could play in educators’ professional development. She argued that the IQMS was in reality a way of life rather than just a tool to monitor and assess quality of teaching and learning situation. This is what he said in this regard:

*“IQMS is a good thing and because besides the incentives the department is giving us, it furthermore gives us clarity on how to teach our classes, and is ideally a way of life” [SB-HOD].*

It is clear from the above discussion that there are a lot of challenges facing the implementation of the IQMS policy and that its intentions, as good as they are, are being challenged when it comes to implementing the policy.

### **“No educator participation in IQMS policy formulation”**

The participation of educators in all key aspects of the school and policy process remains crucial in South Africa given its past as well as its current situation. In this study many participants felt that educators were not involved in the formulation of the IQMS policy. This is despite the fact that teacher unions are in many cases consulted in policy formulation processes. This complaint comes from all the three categories of my participants, namely, principals, HODs and post-level one educators. According to them it does not matter that their unions represents them at the nation level discussions of policy process. They felt that their representatives did not articulate educators’ experiences on the ground. In this regard this is what educator for School-B had to say:

*“We educators have first hand experience, so the policy should come from educators” [SB-Ed].*

On the same issue, the principal of School-B argued that the involvement of schools is crucial; he maintained that the lack of participation of the 'grassroots' in the policy process contributed to its voices not being considered.

*"I don't think that the DoE has considered what problems people experience on the ground" [SB-P].*

The principal of School-A was very particular about who needed to participate in policy formulation among the school-based stakeholders; he felt that school principals should. He argued that they should be involved in debates and deliberations about the IQMS at a provincial level. The principal of School-C added the question of benefits for the policy when educators and school principals have been involved in the policy formulation process. He cited the issue of accountability and ownership of the process as one of the benefits of participation. He suggested how that kind of participation could be facilitated. He said for instance that each province should have three democratically elected principals who should represent their respective provinces in the national policy formulation process. He elaborated that a mandate should be given by schools on things to be discussed that pertain to policy formulation and implementation, and that post-level one educators should have their own representation, with unions continuing to play their role uninterrupted.

### **"There is a need for outside intervention in schools"**

This theme manifested itself in many different ways. There was much agreement among participants about the need to have outside intervention but the nature of that intervention and the motivation for it differed. The principal of School-B for instance argued for the restoration of Subject Advisors and that these Subject Advisors needed to serve a different purpose than they are currently serving. At the moment Subject advisors provide emotional support to educators without having to get inside their respective classrooms. This participant further argued that these officials are specialists, and as such, they are better positioned to assist in supporting teaching and learning. He regarded HODs as not being

appropriate for IQMS because in his view, the HODs are not specialists in their fields.

*“Subject advisors are experts in that field and moving from school-to-school they will realise the standards that are in operation in various schools” [SB-P].*

It is clear from the above discussion that outside intervention will revolve around Subject Advisors and that these are regarded as experts in their respective fields. It is also evident that their tasks as currently structured will need to change if such an intervention is to succeed. Such an idea is supported by the principal of School-C. The HODs for all the three schools agree that outside intervention is needed for quality assurance purposes. The educator for School-C added another layer to the discussion by advocating the usage of outsider intervention for the verification of scores after educators have been assessed. He said on this issue:

*“You need some improvement here and there, but there is no intervention after scoring. Maybe ask experts from outside” [SC-Ed].*

### **“Scores are inflated for better salary and not for development and quality education”**

The data from all the three schools indicated that scores were inflated during class observations. This theme links with the first one about the difficulties in implementing the IQMS at school level where honesty is said not to be prevailing. When scores are inflated it is clear that the purpose of the policy was not being realised. It is clear that subjectivity overruled the purposes of the IQMS process.

*“Since the IQMS is linked to pay progression your friend will not want to disadvantage you, so they give scores to enable you to get one percent that you require to get your salary adjusted” [SB-Ed].*

The above-mentioned point is shared by the educator for School-A when he says that:

*“Nobody would want to score a peer association no matter how badly a teacher performs in the classroom; the peer won’t be honest in terms of scores” [SA-Ed].*

This issue of linking payments to quality assurance measures is topical. The officials in the Department of Education at the national level and the Minister of Education have been quoted as having raised concerns regarding the lack of honesty in the IQMS process. They have questioned the wisdom of putting high scores when educators are being observed but the performance of learners does not indicate that quality teaching has taken place. The Superintendent General was quoted in the Sunday Times (February 2006) as saying that IQMS process could be enhanced and obstacles removed if the department could work collaboratively with Teacher Unions. Such complaints and reservations about this policy are consistent with these negative voices expressed by the educator for School-A above.

#### **“IQMS has made a difference in schools”**

All three schools that participated in this study commended the IQMS for helping bring back the culture of teaching and learning. It has enabled the SMT to be able to go back to classes and observe what goes on in those classrooms. The question of principals or any management person for that matter to get into classrooms has been resisted by educators for many years during the apartheid era. Such resistance intensified during the late 1980s. Surprisingly, the coming of democracy in South Africa did not bring any change in the attitudes of educators regarding being observed in class. It is in that context that the management of the three schools views the IQMS policy as having brought some changes in their schools. The principal of School-A had this to say:

*“We are now able to see what is happening in the classroom; it has enable HODs and principals to go back to class and observe teaching and learning in progress” [SA-P].*

The above sentiments have also been raised by the HOD of School-B where she outlined how the IQMS had helped by providing guidelines about how to teach.

She said that the IQMS document:

*“Provides clarity on how to teach our classes; everything that teachers are supposed to have when we are teaching, keeping records and doing continuous assessment in each case, IQMS spells out the document one must have in order to carry out these tasks” [SB-HOD].*

A similar idea was expressed by the principal of School-C when he stated that IQMS is a policy *“That helps schools by ensuring that people do what they are supposed to do and implement the regulations” [SC-P].*

It is evident that from the school management perspective, schools that were studied had positive experiences about the IQMS implementation. However such a positive attitude was not restricted to the management only. Post-level one educators also had positive experiences about the IQMS policy. Furthermore, these positive experiences emerged from all the three schools. From the perspective of educators, IQMS seems to have provided the ground for introspection among them, and for them to be able to identify their weaknesses and strengths and build on these. For example the educator from school-C uses the metaphor of a mirror. This is what he had to say:

*“IQMS is like a mirror where you observe whether you are progressing or not and where you need improvement...Am I able to control learners during the lesson? What about after we have done work with the learners? Am I doing an assessment? When I’ve done that, where are the records? And if I don’t have the records; why? [SC-Ed].*

The above questions are indicative of reflections and self-assessment that each educator can use to check if s/he is doing his/her work efficiently. It is also important that educators feel that they need to ask themselves critical questions which interrogate their efficiency and a sense of purpose and commitment to teaching and learning. It is in that spirit that the culture of teaching and learning seems to have begun to come back.

**“The IQMS is for quality and development”**

This theme raises an interesting and intriguing question for researchers in terms of understanding views and experiences of educators and principals in the Mayville ward. The discussion in the previous paragraphs paints a negative picture about the IQMS policy in terms of its implementation. Many participants have said that although the IQMS policy is ‘good on paper’, but it is very difficult to implement. However, the same participants were saying that the IQMS policy was for quality and development in schools. Quality has become a buzz word among many stakeholders including parents. In this study, I did not interrogate my participants’ understanding of ‘quality’, but the term, nevertheless seemed to occupy a special place in the participants’ minds. According to the HOD of School-B *“Quality should form part of a teacher’s lifestyle”*, and this is indicative of how quality is so important to many of the participants. On the same issue of quality one of the participants said:

*“No teacher or parent wants to take their learner to a school where there is no quality education. You will find parents putting learners in the nearby school because they know that the school has the quality education because of IQMS” [SB-HOD].*

Other participants were demanding quality out of the IQMS policy although it was not clear how such a quality was to be sought. The HOD for School-C for example was quite vigorous in his demand for quality in school because of IQMS when he said:

*“I want to get quality out of this; it will be ringing in you mind the whole time. Peoples approach and their attitudes will help them a lot in this and they will develop holistically and outwardly” [SB-HOD].*

Besides the focus on quality is the focus on development. The IQMS was regarded by many participants in this study as a vehicle for professional development. This aspect of the theme points to the very first theme which indicated that the IQMS policy was good on paper but difficult to implement. It

appears that one of its good intentions is that of promoting and facilitating educators' professional development. Many the participants are quite clear on this aspect that professional development should be the major outcome of the policy. One of the participants said:

*“The idea of professionally developing teachers is commendable, but during the implementation the problem becomes apparent. IQMS is more than visiting a teacher in the classroom; it’s also involves the holistic development of the school. It entails development, enhancing development and school capacity because there is weakness in every institution. The purpose of IQMS is to identify areas of development needs and develop them” [SA-Ed].*

### **4.3 Conclusion**

The chapter has presented a brief profile of each of the sites where this study was done. It has presented voices from principals of the three schools, HODs as well as educators about their experiences regarding the IQMS implementation. Participants have put more emphasis on them being made part of the IQMS policy formulation. It is expected that may be if participants as policy implementers form part of the policy formulation solution to the concerns may be addressed. It has also shown that the IQMS has made a difference in their schools. This chapter has shown that educators themselves have a lot to share as employees within the organisation. They have also observed things that made IQMS policy implementation impossible, with themselves being the cause. The next chapter presents and summarises the findings. It also makes some recommendations for various key stakeholders within the area of education.

## **CHAPTER 5**

### **FINDINGS, ANALYSIS AND CONCLUSION**

#### **5.1 Introduction**

This study is, in the main about quality assurance in schools and the schools' experiences of the new policy of IQMS. The IQMS as I mentioned in the first chapter, is a mechanism used firstly by the Department of Education to monitor and assure quality of teaching and learning at school level. It has emerged from the data that schools also viewed the IQMS as a mechanism to monitor their own progress in terms of development. The previous chapters touched respectively on the background to the study and problems statement; reviewing relevant literature for a better understanding of the problem being investigated; methodology used to produce the data, the presentation of the data, and this chapter presents the findings, analyses the findings and concludes the study.

In presenting the key findings of the study, I am using research questions as sub-headings and guides to check whether or not the findings are focused on the key questions driving the study. Under each research question, I discuss the findings, and that discussion is fused with links with both the references to the literature and some snippets from the data.

#### **5.2 Research questions re-stated:**

The next section restates the research questions and the discussion of findings in terms of the research questions. This is the best way of showing the extent to which research questions driving the study have been answered.

✓ **How have schools in Mayville ward experienced the process of Integrated Quality Management System implementation?**

It has emerged quite strongly that schools in Mayville Ward have experienced the IQMS implementation as an imposition from the Department of Education. While it may be an acceptable norm that the policies by the government departments are always an imposition in some respects, it is worth noting that the participants in this study highlighted the issue of the lack of participation of the grassroots as the main factor in them viewing the implementation as an imposition. These participants have also highlighted a number of flaws in the policy as contributing to it not being implementable. As far as they are concerned the entire IQMS system has a number of obstacles such as the lack of honesty and time lines which make the system extremely difficult to implement without compromising the quality of teaching and learning. It needs to be mentioned that the question of quality being compromised by the IQMS processes came quite strongly from post-level one educators. Educators from School-A, School-B and School-C all mentioned the fact that friends are not likely to give each other low scores even if the educator being observed did not perform well.

The three educators pointed to different directions about the quality factor being undermined. The educator from School-A for instance, blamed the notion of using peers as part of the process. The educator from School-B pointed to the linkage of this process to pay progression as the main factor which had the potential to undermine quality, while the educator from School-C attributed the lack of honesty to the lack of outside intervention to verify the scores. In fact it was quite strange to find out that while the policy was regarded as an imposition, the same participants considered outside intervention as indispensable for effective and successful implementation of the IQMS policy in schools.

✓ **What are schools' understanding of the purposes and processes of Integrated Quality Management System?**

In discussing my participants' understanding of the purposes and processes of IQMS, I will initially focus on purposes of the IQMS and then later on, deal with the process aspect of it. According to School-C educator, the purpose of IQMS is to ensure that schools 'run smoothly without problems'. According to School-B educator, the IQMS seeks "to develop the educator". Both of these views are significant especially considering that they come from educators from the classroom level, and not from the school management. In chapter one I have indicated that educators have for some time resisted being supervised and have, through the assistance of some teacher unions, succeeded in denying principals and SMT members from observing them while teaching. Bhengu (1999) among other scholars has indicated how teachers denied principals access to their classrooms.

There is another dimension to development that participants pointed out. According to the HOD of School-B "*Quality should form part of a teacher's lifestyle*", and this is indicative of how quality is so important to many of the participants. From the above and other voices in this study, it has become clear that the issue of quality was regarded as part of the work life of the educators studied. Such thinking is in line with Quality of Work Life Theory (QWL) discussed in chapter two. In terms of QWL Theory, there must be active participation of both the employer and the employee in performing quality, and such a scenario should not be regarded as a once off situation but should be a continuous occurrence. The IQMS policy is grounded on the collective agreement between the Department of Education as the employer and teacher unions as representative of the employees. The two theories employed in this study are Quality of Work Life and Collective Fingers Theory. The difference between these two theories is that QWL has Western influence and CFT has African influence. The similarities are that both theories recommend a

participative approach of an employer and the employee in an organisation and both propositions are already recognised and recommended worldwide.

Schools that participated in the study had the view that the IQMS process should start with individual educators, but also that educators should not be viewed in isolation as they are part of the teaching staff. The educator from School-A was quite vocal about this idea. Such a view is clearly linked with notion of collectivity. Perhaps collective fingers theory is relevant in understanding people working together for the betterment of all. This lies at the heart of the interconnection between individuals and organisations. So the idea of the collective in the IQMS process is very prominent in the understanding of how IQMS is expected to unfold. So, the collectivity concept views developing individuals staff members within developing institutions (Kydd, Crawford & Riches, 1997). Bhengu (1999) argues that there can be no organisational development if individuals in that organisation are not developing. The Collective Fingers Theory calls for the active participation of all the members in the organisation. Such participation requires full support of all members in the organisation, and it is always difficult to solicit support for any project or initiative if the people affected are not participating in it (Alfonso, Firth & Neville, 1981).

The findings are pointing to some benefits for schools when they implement the IQMS policy. Both the school management teams and educators were unanimous in that the IQMS had made valuable contributions towards making their schools better. They also expressed hypothetical assumptions about what school could be like if they could adopt the IQMS fully. From the management perspective, the IQMS has granted them access to the classrooms. This is something that they had been deprived of for some decades now due to the educators' resistance to the practice of principals coming to observe educators teaching. From the educators' perspective, the implementation of the IQMS has been 'a revelation' and a 'self-discovery' in terms of teaching. The educator from School-C used a metaphor of a mirror to illustrate how the IQMS had enabled

them as educators to gauge and measure their own progress in terms of teaching. All these issues point to some benefits that this policy has for schools in the researched community. As should be expected, the HODs also felt that the IQMS had at last restored their authority in terms of it enabling them to gain access to the educators' work books, files, classroom and observe them while teaching. It had enabled them to get a sense of what goes on in the classrooms.

✓ **What do schools think needs to be done to enhance IQMS implementation?**

This question was more like making recommendations and is very hypothetical in nature. One of the most generally held views was that the IQMS can work better if staff members can work as a team. Other virtues expressed by many participants were honesty, trust and consistency. Honesty came out strongly when the issue of self-evaluation was raised. Similarly, consistency was raised particularly with regards to assessment aspect of the IQMS. That is, the scores needed to be consistent with the performance levels of the educators as well as learners' outcomes. According to the participants, it does not make sense if educators get high percentage scores during the IQMS process but learner achievement remained dismal; there needed to be consistency there.

The National Minister of Education and other officials also made some remarks on the matter of high scores there were not comparable to the real evidence of educator performance in terms of what was done by the learners. One of the studies conducted outside South Africa in Mexico suggested that educator performance is measured by what is achieved by the learners. That means if learners are under performing, the educators' score cannot be inflated but the educator will take a route to development rather than a route to a better salary. This leaves us with no other option but to recommend that our current education system is learner centered. The learners give a better picture in reflecting what is taking place in the classroom on daily basis. Even if you meet them after their school years they can tell you that they are what they are because of educator X.

They also should be telling us about educator Y's under performance. Let there be a professional way of involving learners without offending educators in front of their learners. There are a number of things to mention that emerged in the study and one of them is that to achieve quality, trust is a major element; quality needs honesty. This is one of the virtues mentioned by participants and it also forms a cornerstone of collective finger theory. Passion is one of them as well; Passion can contribute a lot to IQMS implementation as experienced by the participants in this research. They discovered that passion was lacking in the whole process.

There is a need to enhance the IQMS implementation in schools as suggested by the participants. They made their own thinking on how this need is to be addressed according to their implementation experience results. One of the suggestions participants have made was that there should be active participation of stakeholders that are located at school level. These include educators and school principals. All the participants from all levels discussed this thinking at length. They showed a great interest in telling me more about what they felt. It was as if I was the one given a mandate to allow them to participate in the policy formulation. You could read from their eyes that they were both desperate and frustrated in not being involved in the policy process. Furthermore the participants made suggestions about how their participation in the policy process could be facilitated. They suggested for instance that a structure should be established at a provincial level whereby each province elected a certain number of principals, the HODs and educators to represent them as part of the IQMS policy formulation process.

The participants had other ideas about their participation in the process such as allowing them to review the policy draft and participate by making suggestions. These ideas are in line with what they have stated about the IQMS as a good policy on paper but difficult to implement. The question of teacher unions being part of policy formulation was raised. However, educators that participated in this study felt that as people affected by implemented policies, they should participate

in policy formulation process. This is in addition to teacher union representation. Their interest was to see a practical link between the IQMS formulation and its implementation process. In the QWL theory employees are considered as the rightful people to be involved in decision making in an organisation. That may as well play a major role in quality development. It is confirmed in the QWL theory that companies involved in QWL programmes were productive worldwide. Employees formed part of the decision making and problem solving processes. Ubuntu Management Behaviors (UMB) states that employees being considered with their cultural background in the organisational cultural background can be highly productive. They want to be recognised as part of the organisation and have a say. They want to have a sense of belonging and a sense of ownership.

A need for outside intervention in schools has been expressed by participants. This is part of the thinking suggested by the participants to enhance the IQMS implementation. They felt that a need for outside intervention was a necessity in schools. That outside intervention would help to improve the IQMS implementation. They made mention of how outside intervention was going to be implemented. The neighbouring schools were to organise themselves in forming their own teams depending on the school's need for outside intervention. Another point of view was that of the fifty percent of the IQMS should be managed by school management team and the other fifty percent should be managed by the subject specialists from the Department of Education.

In the Collective Fingers Theory it is suggested that an outsider should be used to conduct a strategic 'bosberaad' as an intervention programme on development.

One of the studies conducted in the United States of America suggested that a need for parent participation as outside intervention in schools may improve both the educator and learner performance. There are a number of independent service providers from the different fields of study in terms of specialisation. Some of them are retired educators, lawyers, managers and so on. These people

can render a good service to schools as outside intervention agents. Quality seems to be a concern everywhere; it needs to be maintained at all levels by both the employer and the employee. That can only be done by the consistency on quality management.

The question of changing the mindset is also very important. The thinking of both the employer and employee should change with the times. That calls for a flexible adaptation to new policies of an organisation. Teacher unions are part of the establishment but the means and ways of enhancing quality in schools seem to be taking a different direction. In one of the studies used in this research, teacher unions' activity was rated number six on Batho Pele. The rating was about the obstacles to the maintenance of quality in schools. Though they did not specifically and clearly address how the teacher unions became the obstacles to quality in schools. In the five stages of the Collective Fingers Theory teacher union's involvement stage is rated number two on the survival theme. This is during the 'bosberaad' where an outsider should be part of the teacher unions' involvement during this stage. With regards to the above issue, Collective Fingers Theory teacher unions will be playing a positive role rather than becoming an obstacle. This might well address the findings on the study about teacher unions as obstacles on quality enhancement in schools.

Communication is another important aspect that needs serious attention. Imagine a situation where workers fail to communicate in an organisation or else there is a communication break down on company policy. Schools are located at the grassroots in the process of IQMS implementation. The argument being advanced in that respect is that communication can enhance quality in schools. The schools said they also wanted to say something after experiencing IQMS implementation if an ear could be given to them. They even said that the documents were sent to them one after another without any verbal communication as a response from the IQMS policy document receivers and implementers. On the Quality of Work Life theory communication was rated top

in the agenda on quality enhancement. The theory stresses employer feedback as the main activity in the process. In one of the studies done in South Africa included in this study, communication was rated poor within the schools with a special reference to principals.

### **5.3 Conclusion**

In conclusion I can say that this study has attempted to capture experiences of schools in Mayville Ward with regards to the IQMS policy implementation. This was done through interactions with school principals, heads of departments and educators. In reviewing literature certain information has emerged such as the similarities and differences between the quality assurance measures used in the United States and that used in South Africa. The Quality of Work Life Theory and Collective Fingers Theory have indicated some linkages between the Western and African philosophies in terms of conceptions of work, care and human dignity. Both these philosophies demonstrate the need to incorporate values and life style into work life on continuous bases.

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**Appendix 1**  
**Letter to the Department of Education requesting permission to  
conduct research**

Z1487 Umlazi  
Phase 5  
Durban  
4360

14<sup>th</sup> January 2006

Province of KwaZulu Natal  
Department of Education

**RE: APPROVAL TO CONDUCT RESEARCH**

Dear Sir/Madam

I am a student of the University of KwaZulu Natal, Student Number 200201777, and I am requesting permission to conduct research in KwaZulu Natal schools, Mayville ward.

My topic is centred around the relationship, Policy formulation and Policy implementation by Mayville Ward Schools on the Integrated Quality Management System and its implementation.

I would be most grateful if you would allow me the opportunity to conduct the research I require in order to complete my dissertation for my Masters Degree.

Yours faithfully

J B Mncwabe.

## Appendix 2

## Letter from the Department of Education granting approval to conduct research

PAGE 03



PROVINCE OF KWAZULU-NATAL  
ISIFUNDAZWE SAKWAZULU-NATALI  
PROVINSIE KWAZULU-NATAL

DEPARTMENT OF EDUCATION  
UMNYANGO WEFUNDO  
DEPARTEMENT VAN ONDERWYS

Tel: 033 341 8813  
Fax: 033 341 8812

Private Bag X9107  
Pietermaritzburg  
3200

226 Pietermaritz Street  
Pietermaritzburg, 3201

NO. 2771

DIE KENNEDY'S

PIETERMARITZBURG

HEERENSTRAAT

Enquiries:  
Embuzweni M. Francis  
Nevada.

Refugees:  
Intakes: 012303  
Vervolg:

Date:  
Lusaka  
Datum: 26/07/2006

To: BJ Mncwabe

RE: APPROVAL TO CONDUCT RESEARCH

Please be informed that your application to conduct research has been approved with the following terms and conditions:

That as a researcher, you must present a copy of the written permission from the Department to the Head of the Institution concerned before any research may be undertaken at a departmental institution bearing in mind that the institution is not obliged to participate if the research is not a departmental project.

Research should not be conducted during official contact time, as education programmes should not be interrupted, except in exceptional cases with special approval of the KZNDoe.

The research is not to be conducted during the fourth school term, except in cases where the KZNDoe deem it necessary to undertake research at schools during that period.

Should you wish to extend the period of research after approval has been granted, an application for extension must be directed to the Director Resource Planning.

The research will be limited to the schools or institutions for which approval has been granted.

A copy of the completed report, dissertation or thesis must be provided to the Research Directorate.

Lastly, you must sign the attached declaration that you are aware of the procedures and will abide by the same.

for SUPERINTENDENT GENERAL  
KwaZulu Natal Department of Education

EDUCATION

26/07/2006 11:22 031-2603600

26 Jul. 2006 11:38

PAGE 02

F. 1

NU. 27/1

EDUCATION

26/07/2006 11:22 031-2603600



PROVINCE OF KWAZULU-NATAL  
ISIFUNDAZWE SAKWAZULU-NATALI  
PROVINSIE KWAZULU-NATAL

DEPARTMENT OF EDUCATION  
UMNYANGO WEMFUNDO  
DEPARTEMENT VAN ONDERWYS

Tel: 031 341 8813  
Fax: 031 341 8812

Private Bag 9107  
Pietermaritzburg  
3209

208 Pietermaritzburg Street  
Pietermaritzburg, 3204

Subject:  
Imbuzo: M Grade  
Mavua:

Reference:  
Isimbuzo: 018008  
Yezinying:

Date:  
Usuku:  
Datum: 24/07/2006

RE: PERMISSION TO CONDUCT RESEARCH

TO WHOM IT MAY CONCERN

This is to serve as a notice that S.J. Mncwaba (20020177) has been granted permission to conduct research with the following terms and conditions:

- > That as a researcher, he/she must present a copy of the written permission from the Department to the Head of the institution concerned before any research may be undertaken at a departmental institution.
- > S.J. Mncwaba has been granted special permission to conduct his/her research during official contact times, as it is believed that their presence would not interrupt education programmes. Should education programmes be interrupted, he/she must, therefore, conduct his/her research during nonofficial contact times.
- > No school is expected to participate in the research during the fourth school term, as this is the critical period for schools to focus on their exams.

for SUPERINTENDENT GENERAL  
KwaZulu Natal Department of Education

Declaration and Understanding - Ref: 103/06

04

PAGE

P. 3

No. 29/1

I the undersigned declare that I acknowledge that I have read and understood the above-mentioned terms and conditions and agree to abide by them. The Research, Strategy, Policy Development and EMIS Directorate reserve the right to withdraw my approval should I be found not to abide by the terms and conditions. I undertake to bind myself to the RSPDE directorate, to submit a copy of the completed report, dissertation or thesis as per terms and conditions.

Name (print): \_\_\_\_\_

Date: \_\_\_\_\_ Signature of applicant: \_\_\_\_\_

EDUCATION

031-2603600  
11:22  
2000 11.20

**Appendix 5**  
**Informed consent**

**Informed Consent Letter**

I am pursuing Masters Degree as a student at the University of KwaZulu Natal. I am also conducting a research about the Relationship between Policy Formulation and Policy Implementation by the Mayville Ward schools: A case of Integrated Quality Management System and its Implementation by the Mayville Ward schools: A case of Integrated Quality Management System and its implementation. Your participation will influence the success of this study. I however designed this study in such a way that it will not disturb daily school routine of the participants.

I am also declaring that should you wish to participate in this study, your name will never be disclosed to any one. All information provided in this study will be managed with strictest confidence. Your participation in this study is not compulsory but voluntary and you have the right to withdraw from the study at any stage of the research process.

Your interest will be shown by filling in the declaration below.

**DECLARATION**

Project: Research on IQMS implementation in schools

I, ..... (Full name of participant) hereby confirm that I understand the contents of this document and the nature of the research project, and consent to participating in the research project.

I understand that I am at liberty to withdraw from the project at any time, should I so desire.

Signature of Participant

Date

.....

.....

Contact details: Researcher: Jetro Bongani Mncwabe 0781816254(C) or 031-9063174(W)

Supervisor: - Dr T.T. Bhengu 033-2605354 (W) Or 0839475321(W)

E-mail: bhengutt @ ukzn.ac.za

**ETHICAL CLEARANCE APPLICATION FORM  
(SOCIAL SCIENCES AND HUMANITIES)**

**Inquiries:**

**Ms Phumelele Ximba**  
**Tel: 260 3587**  
**Email: ximbap@ukzn.ac.za**

PLEASE NOTE THAT THE FORM MUST BE COMPLETED IN TYPED SCRIPT;  
HANDWRITTEN APPLICATIONS WILL NOT BE CONSIDERED

**SECTION 1: PERSONAL DETAILS**

- 1.1 **Full Name & Surname of Applicant:** Jetro Bongani Mncwabe  
1.2 Title (Ms/ Mr. / Mrs. / Dr/ Professor Etc): Mr  
1.3 Student Number : 200201777  
Staff Number : N/A  
1.4 Discipline : Educational Leadership Management and  
Policy  
1.5 School : University of KwaZulu – Natal  
1.6 Faculty : Education  
1.7 Campus : Edgewood  
1.8 Existing Qualifications: FDE, FDE (Man), PTC, SEC, COTE, DELT, Persn. Man  
Dip.  
1.9 Proposed Qualification for Project: MEd

**2. Contact Details**

Tel. No. : (031) 9063174  
Cell. No. : 0781816254  
e-mail : \_\_\_\_\_

**3. SUPERVISOR/ PROJECT LEADER DETAILS**

<i>NAME</i>	<i>TEL. &amp; FAX</i>	<i>EMAIL</i>	<i>DEPARTMENT / INSTITUTION</i>	<i>QUALIFICA- TIONS</i>
3.1 Dr T.T. Bhengu	033-260 5354 (Work) 033-260 5080 (Fax) 0839475321 (Mobile)	bhengutt@ukzn.ac.za	School of Education and Development	STD; B. Paed; B. Ed; M. Ed; D. Ed
3.2				
3.3				

## SECTION 2: PROJECT DESCRIPTION

Please do *not* provide your full research proposal here: what is required is a short project description of not more than two pages that gives, under the following headings, a brief overview spelling out the background to the study, the key questions to be addressed, the participants (or subjects) and research site, including a full description of the sample, and the research approach/ methods

### 2.1 Project title

The Relationship between Policy Formulation and Policy Implementation by the Mayville Ward Schools: A case of Integrated Quality Management System and its implementation.

### 2.2 Location of the study (where will the study be conducted)

The study will be conducted at the Mayville Ward schools, which forms part of an urban area.

### 2.3 Objectives of and need for the study

#### *The major objectives*

- To explore the relationship between policy formulation strategies and policy implementation in schools.
- To contribute to the existing knowledge for better understanding.

#### *Theoretical approach of the research*

- My study theoretical framework will be based on Quality of Work Life (QWL) and the Collective Finger Theory (CTF) paradigms. This paradigms promote participative management, job enrichment, worker involvement. It also considers individual involvement in an organisation .IQMS also considers individual employee involvement in schools as organisations.

### 2.4 Questions to be answered in the research

(Set out the critical questions which you intend to answer by undertaking this research.)

#### *Critical questions*

1. How have Mayville ward experienced the process of Integrated Quality Management System implementation?
2. What are the schools understanding of the purposes and process of The Integrated Quality Management System?

3. What do schools think need to be done to enhance Integrated Quality Management System implementation?

### 2.5 Research approach/ methods

(This section should explain how you will go about answering the critical questions which you have identified in Section 4. Set out the approach within which you will work, and indicate in step-by-step point form the methods you will use in this research in order to answer the critical questions.

For a study that involves surveys, please append a provisional copy of the questionnaire to be used. The questionnaire should show how informed consent is to be achieved as well as indicate to respondents that they may withdraw their participation at any time, should they so wish.)

- My research method will be qualitative in nature (interviews)

#### Data collection

##### *Target population and sampling*

- My research target population will be Mayville ward schools.
- Mayville ward schools are selected because I feel it will be easier to work with principals as one of them.
- Three schools will be selected in this ward for purposeful sampling

##### Data Analysis

- Tape recorders will be used to collect data from participants.
- Data will be transcribed

##### Reliability and Validity

The reliability and validity of data collection will be adhered to by the researcher.

### 2.6 Proposed work plan

STEPS	DATES
• Proposal writing	April 2006
• Ethical clearance	April 2006
• Literature review	May 2006
• Instrument design	June 2006
• Data collection	June 2006
• Data analysis	July 2006
• Writing up	August-October 2006
• Submission	November 2006

### SECTION 3: ETHICAL ISSUES

The UKZN Research Ethics Policy applies to all members of staff, graduate and undergraduate students who are involved in research on or off the campuses of University of KwaZulu-Natal. In addition, any person not affiliated with UKZN who wishes to conduct research with UKZN students and / or staff is bound by the same ethics framework. Each member of the University community is responsible for implementing this Policy in relation to scholarly work with which she or he is associated and to avoid any activity which might be considered to be in violation of this Policy.

All students and members of staff must familiarize themselves with AND sign an undertaking to comply with the University's "Code of Conduct for Research".

#### QUESTION 1.

Does your study cover research involving:	YES	NO
Children		✓
Persons who are intellectually or mentally impaired		✓
Persons who have experienced traumatic or stressful life circumstances		✓
Persons who are HIV positive		✓
Persons highly dependent on medical care		✓
Persons in dependent or unequal relationships		✓
Persons in captivity		✓
Persons living in particularly vulnerable life circumstances		✓

If "Yes", indicate what measures you will take to protect the autonomy of respondents and (where indicated) to prevent social stigmatisation and/or secondary victimisation of respondents. If you are unsure about any of these concepts, please consult your supervisor/ project leader.

#### QUESTION 2.

Will data collection involve any of the following:	YES	NO
Access to confidential information without prior consent of participants		✓
Participants being required to commit an act which might diminish self-respect or cause them to experience shame, embarrassment, or regret		✓
Participants being exposed to questions which may be experienced as stressful or upsetting, or to procedures which may have unpleasant or harmful side effects		✓
The use of stimuli, tasks or procedures which may be experienced as stressful, noxious, or unpleasant		✓
Any form of deception		✓

If "Yes", explain and justify. Explain, too, what steps you will take to minimise the potential stress/harm.

### QUESTION 3.

Will any of the following instruments be used for purposes of data collection:	YES	NO
Questionnaire		✓
Survey schedule		✓
Interview schedule	✓	
Psychometric test		✓
Other/ equivalent assessment instrument		✓

If "Yes", attach copy of research instrument. If data collection involves the use of a psychometric test or equivalent assessment instrument, you are required to provide evidence here that the measure is likely to provide a valid, reliable, and unbiased estimate of the construct being measured. If data collection involves interviews and/or focus groups, please provide a list of the topics to be covered/ kinds of questions to be asked.

### QUESTION 4.

Will the autonomy of participants be protected through the use of an informed consent form, which specifies (in language that respondents will understand):	YES	NO
The nature and purpose/s of the research	✓	
The identity and institutional association of the researcher and supervisor/project leader and their contact details	✓	
The fact that participation is voluntary	✓	
That responses will be treated in a confidential manner		
Any limits on confidentiality which may apply	✓	
That anonymity will be ensured where appropriate (e.g. coded/ disguised names of participants/ respondents/ institutions)	✓	
The fact that participants are free to withdraw from the research at any time without any negative or undesirable consequences to themselves	✓	
The nature and limits of any benefits participants may receive as a result of	✓	

their participation in the research		
Is a copy of the informed consent form attached?	✓	

If not, this needs to be explained and justified, also the measures to be adopted to ensure that the respondents fully understand the nature of the research and the consent that they are giving.

#### QUESTION 5.

<b>Have efforts been made to obtain informed permission for the research from appropriate authorities and gate-keepers (including caretakers or legal guardians in the case of minor children)?</b>	<b>YES</b>	<b>NO</b>
	✓	

If not, this needs to be explained and justified.

#### QUESTION 6.

**How will the research data be secured, stored and/or disposed of?**

After the completion of the whole process data collected will be destroyed. During the process the data collection and storing for analysis, the researcher will use his office strong room to secure data collected.

#### QUESTION 7.

**In the subsequent dissemination of your research findings – in the form of the finished thesis, oral presentations, publication etc. – how will anonymity/ confidentiality is protected?**

The research instrument is designed in the manner that does not expose direct names of the institutions as well as the respondents' names; except the area where research will be conducted as a case study. Respondents will form part of the audience especially in the case of oral presentation.

**SECTION 4: FORMALISATION OF THE APPLICATION**

I have familiarised myself with the University's Code of Conduct for Research and undertake to comply with it. The information supplied above is correct to the best of my knowledge.

.....  
.....  
**SIGNATURE OF APPLICANT**  
**DATE**

.....  
.....  
**DATE:**  
.....  
**SIGNATURE OF SUPERVISOR/ PROJECT LEADER**  
: .....

**RECOMMENDATION OF FACULTY RESEARCH COMMITTEE**

**FULL NAME :** \_\_\_\_\_ **( CHAIRPERSON)**  
**DATE:** \_\_\_\_\_

**SIGNATURE :** \_\_\_\_\_

**RECOMMENDATION OF UNIVERSITY RESEARCH ETHICS SUB-COMMITTEE  
(HUMANITIES AND SOCIAL SCIENCES)**

**FULL NAME :** \_\_\_\_\_ **( CHAIRPERSON)**  
**DATE:** \_\_\_\_\_

**SIGNATURE :** \_\_\_\_\_



UNIVERSITY OF  
KWAZULU-NATAL

Room A126  
Edgewood Campus

31<sup>st</sup> March 2008

Mncwabe, JB

RE: Ethical Clearance Certificate

To whom it may concern,

This letter certifies that an Ethical Clearance Certificate was granted to Mncwabe, JB (Student no: 200201777) Master of Education.

Title of Dissertation: "The relationship between policy formulation and policy implementation by the Mayville Ward School: A case of integrated management system and its implementation"

This EC certificate is on file with the Faculty of Education, Edgewood Campus and should anyone require a copy they can contact my office on the numbers provided.

Yours truly,9

A handwritten signature in black ink, appearing to read 'Derek Buchler'.

Derek Buchler  
Research Officer

cc. Prof Bhana  
File

### Faculty Research Office – Education

Postal Address: Private Bag X03, Ashwood 3605, South Africa

Telephone: +27 (0)31 260 3524

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Founding Campuses:

■ Edgewood

■ Howard College

■ Medical School

■ Pietermaritzburg

■ Westville



2006-08-08

RESEARCH OFFICE (GOVAN MBEKI CENTRE)  
WESTVILLE CAMPUS  
TELEPHONE NO.: 031 - 2603587  
EMAIL: ximbap@ukzn.ac.za

4 AUGUST 2006

MR. JB MNCWABE (2002201777)  
EDUCATION

Dear Mr. Mncwabe

ETHICAL CLEARANCE: "THE RELATIONSHIP BETWEEN POLICY FORMULATION AND POLICY IMPLEMENTATION BY THE MAYVILLE WARD SCHOOLS: A CASE OF INTEGRATED QUALITY MANAGEMENT SYSTEM AND ITS IMPLEMENTATION"

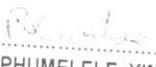
I wish to confirm that ethical clearance has been granted for the above project subject to:

1. Letters of permission from school principals being provided
2. Grammar being corrected on informed consent document

This approval is granted provisionally and the final clearance for this project will be given once the conditions have been met. Your Provisional Ethical Clearance Number is HSS/06323

Kindly forward your response to the undersigned as soon as possible

Yours faithfully

  
MS. PHUMELELE XIMBA  
RESEARCH OFFICE

PS: The following general condition is applicable to all projects that have been granted ethical clearance:

THE RELEVANT AUTHORITIES SHOULD BE CONTACTED IN ORDER TO OBTAIN THE NECESSARY APPROVAL SHOULD THE RESEARCH INVOLVE UTILIZATION OF SPACE AND/OR FACILITIES AT OTHER INSTITUTIONS/ORGANISATIONS. WHERE QUESTIONNAIRES ARE USED IN THE PROJECT, THE RESEARCHER SHOULD ENSURE THAT THE QUESTIONNAIRE INCLUDES A SECTION AT THE END WHICH SHOULD BE COMPLETED BY THE PARTICIPANT (PRIOR TO THE COMPLETION OF THE QUESTIONNAIRE) INDICATING THAT HE/SHE WAS INFORMED OF THE NATURE AND PURPOSE OF THE PROJECT AND THAT THE INFORMATION GIVEN WILL BE KEPT CONFIDENTIAL.

cc. Faculty Research Office (Derek Buchler)  
cc. Supervisor (Dr. TT Bhengu)

**INTERVIEW GUIDE WITH THE SCHOOL PRINCIPAL**

**Experiences of IQMS**

- As a school principal how have you experienced the IQMS implementation in your school?
- What role did you play in that process of IQMS implementation?
- Do you feel that principals should be involved at a national departmental level when policies are formulated? If yes, what are the better ways of facilitating that participation?
- What do you feel about IQMS implementation in your school?

**Purposes and processes of IQMS**

- What do you think was the purpose of formulating the IQMS policy for schools?
- What do you think is the purpose of IQMS implementation?
- How has your school conducted IQMS?
- What is it that you have found useful in the process of IQMS implementation?
- What is it that you have found not useful in the process of IQMS implementation?
- What challenges has your school faced in implementing IQMS?

**Enhancing the IQMS implementation**

- What do you think you as school principal should do in order to ensure that IQMS is successfully implemented in your school?
- What do you think schools can do to facilitate IQMS implementation?
- What role should HODs and educators play to enhance the process of IQMS implementation?

**NB These questions are just guideline and more follow-up questions will be asked to further probe participants' responses.**

## INTERVIEW GUIDE FOR HODS

### Experiences of IQMS

- What is your IQMS experience in your school?
- As an HOD how do you experience IQMS in working with other role-players?
- What role did you play as an HOD in that process of IQMS implementation?
- Do you feel that educators or HODs should be involved at a national departmental level when policies are formulated? If yes, what are the better ways of facilitating that participation?

### Purposes and processes of IQMS

- What do you think was the purpose of formulating the IQMS policy for schools?
- Can you tell how the IQMS was introduced to your school?
- What is it that you have found useful in the process of IQMS implementation?
- What is it that you have found not useful in the process of IQMS implementation?
- What challenges has your school faced in implementing IQMS?

### Enhancing the IQMS implementation

- What do you think schools can do to enhance the IQMS implementation?
- What role do you think the principal should play to enhance the process of IQMS implementation?
- What role do you think you as an HOD should play to improve IQMS implementation?

**NB These questions are just guideline and more follow-up questions will be asked to further probe participants' responses.**

## INTERVIEW GUIDE FOR EDUCATORS

### Experience of IQMS

- How did you experience the IQMS implementation in your school as an educator?
- What role did you play in that process of IQMS implementation?
- Do you feel that educators should be involved at a national departmental level when policies are formulated? If yes, what are the better ways of facilitating that participation?

### Purposes and processes of IQMS

- What do you think is the purpose of IQMS implementation?
- How has your school conducted IQMS?
- What is it that you have found useful in the process of IQMS implementation?
- What is it that you have found not useful in the process of IQMS implementation?
- What challenges has your school faced in implementing IQMS?

### Enhancing the IQMS implementation

- What do you think you as educators should do in order to ensure that IQMS is successfully implemented in your school?
- What do you think schools can do to facilitate IQMS implementation?
- What role should principals play in the process of IQMS implementation?

**NB These questions are just guideline and more follow-up questions will be asked to further probe participants' responses.**

## Appendix 10

## Evaluation Systems for different departments of education under the old dispensation

	EX-HOUSE OF DELEGATES	DEPT. OF EDUCATION AND TRAINING	NATAL EDUCATION DEPARTMENT	KWAZULU DEPT. OF EDUCATION & CULTURE	EX-HOUSE OF REPRESENTATIVES	PROPOSALS IN RESPECT OF NEW SYSTEM
7. SYSTEM OF EVALUATION	<p>A separate rating instrument is utilised for:</p> <ul style="list-style-type: none"> <li>- Level 1 educators;</li> <li>- Heads of Department;</li> <li>- Deputy and Senior Deputy Principals;</li> <li>- Principals;</li> <li>- College Personnel</li> </ul> <p>Evaluation is done on a 7 point scale:</p> <ul style="list-style-type: none"> <li>1 - Poor</li> <li>2 - Weak</li> <li>3 - Fair</li> <li>4 - Satisfactory</li> <li>5 - Good</li> <li>6 - Very Good</li> <li>7 - Excellent</li> </ul> <p>Scores are converted to symbols as follows:</p> <ul style="list-style-type: none"> <li>64-70 - A (91,4%)</li> <li>57-63 - B (81,4%)</li> <li>50-59 - C (71,4%)</li> <li>43-49 - D (61,4%)</li> <li>42 &amp; below - E</li> </ul> <p>Feedback in respect of evaluation is in the form of symbols.</p>	<p>Applicants are interviewed by a Selection panel constituted by the area office.</p>	<p>A 7 point scale is used. Scores are converted to percentages:</p> <ul style="list-style-type: none"> <li>85-100 - highly promotable</li> <li>70-84 - strongly promotable</li> <li>60-69 - promotable</li> <li>0-60 - not promotable</li> </ul> <p>Applicants are advised of their promotability rating.</p>	<p>PRIMARY SCHOOLS: Applicants are interviewed by the Circuit Inspector and his team.</p> <p>SECONDARY SCHOOLS: Applicants are interviewed by the Chief Inspector.</p>	<p>The School Committee makes recommendations in respect of candidates.</p>	
8. EVALUATORS	<p>The evaluation of applicants is carried out by the Principal and members of the management team (SDP, DP and HODS).</p> <p>The Superintendent of Education (Management) evaluates Principals and Acting Principals.</p>	<p>The selection panel.</p>	<p>Two evaluators evaluate each applicant (school based). Applicants for senior posts are evaluated by Superintendents.</p>	<p>PRIMARY SCHOOLS: Circuit Inspectorate</p> <p>SECONDARY SCHOOLS: Chief Inspectorate</p>	<p>Inspectors of Education</p>	

APPENDIX 3

	Departmental Circulars	Regional Gazette Media	Department Circulars/Gazette	Departmental Circulars	Education Bulletins
2. <u>MANNER OF ADVERTISING POSTS</u>	Departmental Circulars				
3. <u>FREQUENCY OF PROMOTIONS</u>	Departmental Circulars Although provision exists for promotions to be effected from 1/1 and 1/7, promotions are effected annually (1/1)	Twice a year 1/1 and 1/7	Twice a year : 1/1 and 1/7	Whenever necessary candidates are interviewed for appointment to promotion posts.	Twice a year 1/1 and 1/7
4. <u>LEVEL AT WHICH PROMOTIONS ARE EFFECTED</u>	Head Office	Decentralised to Area Level in respect of Levels 2-5; for Area and Circuit Offices and Schools post level 6-8 : Head Office	Head Office	PRIMARY SCHOOLS; Circuit Inspectorate SECONDARY SCHOOLS; Chief Inspectorate COLLEGES OF EDUCATION; Head Office	Head Office
5. <u>PROMOTION REQUIREMENTS</u>					
5.1 <u>ELIGIBILITY IN TERMS OF YEARS IN POST</u>	A minimum of two years within a post level.	No restriction.	No restriction.	No restriction	No restriction
5.2 <u>MOBILITY IN TERMS OF POST LEVELS</u>	Applicants may only apply for promotions to posts one level higher than their present post, except in special circumstances when this restriction is relaxed.	No restriction.	No restriction.	No restriction	Applicants may only apply for promotion to posts one level higher than their present post.

APPENDIX 1

89

91



**Appendix 11**  
**Application for employment**  
**Application for Employment**

<p><b>WHAT IS THE PURPOSE OF THIS FORM</b></p> <p>To assist a government department in selecting a person for an advertised post.</p> <p>This form may be used to identify candidates to be interviewed. Since all applicants cannot be interviewed, you need to fill in this form completely, accurately and legibly. This will help to process your application fairly.</p> <p><b>WHO SHOULD COMPLETE THIS FORM</b></p> <p>Only persons wishing to apply for an advertised position in a government department.</p> <p><b>ADDITIONAL INFORMATION</b></p> <p>This form requires basic information. Candidates who are selected for interviews will be requested to furnish additional certified information that may be required to make a final selection.</p> <p><b>SPECIAL NOTES</b></p> <p>1 - All information will be treated with the strictest confidentiality and will not be disclosed or used for any other purpose than to assess the suitability of a person, except in so far as it may be required and permitted by law. Your personal details must correspond with the details in your ID or passport.</p> <p>2 - Passport number in the case of non-South Africans.</p> <p>3 - This information is required to enable the department to comply with the Employment Equity Act, 1998.</p> <p>4 - This information will only be taken into account if it directly relates to the requirements of the position.</p> <p>5 - Applicants with substantial qualifications or work experience must attach a CV.</p>	<table border="1" style="width: 100%; border-collapse: collapse;"> <tr> <td colspan="5" style="text-align: center;"><b>A. THE ADVERTISED POST</b></td> </tr> <tr> <td colspan="2" style="padding: 5px;">Position for which you are applying (as advertised)</td> <td colspan="3" style="padding: 5px;">Department where the position was advertised</td> </tr> <tr> <td colspan="2" style="padding: 5px;">Reference number (as stated in the advert)</td> <td colspan="3" style="padding: 5px;">If you are offered the position, when can you start OR how much notice must you serve with your current employer?</td> </tr> <tr> <td colspan="5" style="text-align: center;"><b>B. PERSONAL INFORMATION</b></td> </tr> <tr> <td colspan="2" style="padding: 5px;">Surname</td> <td colspan="3"></td> </tr> <tr> <td colspan="2" style="padding: 5px;">First Names</td> <td colspan="3"></td> </tr> <tr> <td colspan="2" style="padding: 5px;">Date of Birth</td> <td colspan="3"></td> </tr> <tr> <td colspan="2" style="padding: 5px;">ID number <sup>2</sup></td> <td colspan="3"></td> </tr> <tr> <td style="padding: 5px;">Race <sup>3</sup></td> <td style="padding: 5px;"><i>African</i></td> <td style="padding: 5px;"><i>White</i></td> <td style="padding: 5px;"><i>Coloured</i></td> <td style="padding: 5px;"><i>Indian</i></td> </tr> <tr> <td colspan="2" style="padding: 5px;">Gender <sup>3</sup></td> <td style="padding: 5px;"><i>FEMALE</i></td> <td colspan="2" style="padding: 5px;"><i>MALE</i></td> </tr> <tr> <td colspan="2" style="padding: 5px;">Do you have a disability? <sup>3</sup></td> <td style="padding: 5px;"><i>YES</i></td> <td colspan="2" style="padding: 5px;"><i>NO</i></td> </tr> <tr> <td colspan="2" style="padding: 5px;">Are you a South African Citizen?</td> <td style="padding: 5px;"><i>YES</i></td> <td colspan="2" style="padding: 5px;"><i>NO</i></td> </tr> <tr> <td colspan="2" style="padding: 5px;">If no, what is your Nationality</td> <td colspan="3"></td> </tr> <tr> <td colspan="2" style="padding: 5px;">And do you have a valid work Permit?</td> <td style="padding: 5px;"><i>YES</i></td> <td colspan="2" style="padding: 5px;"><i>NO</i></td> </tr> <tr> <td colspan="2" style="padding: 5px;">Have you ever been convicted of a criminal offence or been dismissed from employment? <sup>4</sup></td> <td style="padding: 5px;"><i>YES</i></td> <td colspan="2" style="padding: 5px;"><i>NO</i></td> </tr> <tr> <td colspan="2" style="padding: 5px;">If your profession or occupation requires State or official registration, provide date and particulars of registration.</td> <td colspan="3"></td> </tr> <tr> <td colspan="5" style="text-align: center;"><b>C. HOW DO WE CONTACT YOU</b></td> </tr> <tr> <td colspan="2" style="padding: 5px;">Preferred language for correspondence?</td> <td colspan="3"></td> </tr> <tr> <td colspan="2" style="padding: 5px;">Telephone number during office hours</td> <td colspan="3" style="padding: 5px;">( ) .</td> </tr> <tr> <td colspan="2" style="padding: 5px;">Preferred method for correspondence</td> <td style="padding: 5px;">Post</td> <td style="padding: 5px;">E-mail</td> <td style="padding: 5px;">Fax</td> </tr> <tr> <td colspan="2" style="padding: 5px;">Correspondence contact details (in terms of above)</td> <td colspan="3"></td> </tr> </table>	<b>A. THE ADVERTISED POST</b>					Position for which you are applying (as advertised)		Department where the position was advertised			Reference number (as stated in the advert)		If you are offered the position, when can you start OR how much notice must you serve with your current employer?			<b>B. 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**PROVINCE OF KWAZULU-NATAL**  
**DEPARTMENT OF EDUCATION**  
**CURRICULUM VITAE FORM**

- Section 1 must be completed by ALL applicants
- Section 2 must be completed by applicants to LEVEL 1 POSTS ONLY.
- Section 3 must be completed by applicants to PROMOTION POSTS

**SECTION 1**

**A. PERSONAL PARTICULARS**

ARE YOU AN ADDITIONAL EDUCATOR		(MARK WITH "X")		YES	NO
1.1 SURNAME			1.2 MAIDEN NAME (If applicable)		
1.3 FIRST NAME /S				1.4 TITLE	
1.5 PERSAL NO. (IF APPLICABLE)					
1.6 POSTAL ADDRESS					
	POSTAL CODE				
1.7 PERMANENT RESIDENTIAL ADDRESS					
	POSTAL CODE				
1.8 CONTACT NUMBERS	HOME		CODE		
	WORK		CODE		
	CELLULAR (if any)				
1.9 CONTACT PERSON	NAME				
	TELEPHONE		CODE		
	CELLULAR (if any)				

**B. EMPLOYMENT DETAILS AND HISTORY**

1.10 PROVINCIAL/NATIONAL DEPARTMENT OF EDUCATION						
1.11 WHERE STATIONED (Name of School/Institution/Other)						
1.12 CURRENT PERMANENT POST (Please indicate if applicable)	LEVEL 1	HOD	DEPUTY PRINCIPAL	PRINCIPAL		
	B REQV 12	C REQV 13	D REQV 14	E REQV 15	F REQV 16	G REQV 17
1.13 CATEGORY CLASSIFICATION (Please indicate)						
1.14 TOTAL YEARS OF SERVICE						

**D. LANGUAGE PROFICIENCY - state 'good', 'fair' or 'poor'**

Languages (specified)						
Speak						
Read						
Write						

**E. QUALIFICATIONS <sup>P</sup>** (please ignore if you have attached a CV with these details)

Name of School / Technical College	Highest qualification obtained	Year Obtained
<i>Tertiary education (complete for each qualification you obtained)</i>		
Name of Institution	Name of Qualification	Year Obtained
Current study (institution and qualification)		

**F. WORK EXPERIENCE <sup>P</sup>** (please ignore if you have attached a CV with these details)

Employer (including current employer)	Post held	From		To		Reason for Leaving	
		MM	YY	MM	YY		
If you were previously employed in the Public Service, indicate whether any condition exists that prevents your re-employment						YES	NO
If yes, provide the name of the previous employing department							

**G. REFERENCES** (please ignore if you have attached a CV with these details):

Name	Relationship to you	Tel. No. (office hours)

**DECLARATION**  
 I declare that all the information provided (including any attachments) is complete and correct to the best of my knowledge. I understand that any false information supplied could lead to my application being disqualified or my discharge if I am appointed.

Signature: \_\_\_\_\_ Date: \_\_\_\_\_

**SECTION 2**

**(TO BE COMPLETED BY APPLICANTS TO LEVEL 1 POSTS)**

(DO NOT EXCEED THE NUMBER OF LINES PROVIDED)

2.1 SUBJECT/S PHASE/S CAPABLE OF TEACHING/AREA OF EXPERIENCE


2.2 INDICATE RELEVANT QUALIFICATIONS, TRAINING INTEREST OR INVOLVEMENT IN SPORT/EXTRA CURRICULAR ACTIVITIES


**LEVEL 1 EDUCATORS ONLY**

**DECLARATION**

I hereby certify that the information supplied is correct and I undertake to furnish any original documents on request.

\_\_\_\_\_  
Signature of Applicant

\_\_\_\_\_  
Date

**SECTION 3**

**(TO BE COMPLETED BY APPLICANTS FOR PROMOTION POSTS ONLY)**

(DO NOT EXCEED THE NUMBER OF LINES PROVIDED)

**2.1 LEADERSHIP: ADMINISTRATIVE, MANAGEMENT AND RELATED EXPERIENCE**


**2.2 ORGANISATIONAL ABILITY AND EXPERIENCE**


**LEVEL 2 AND ABOVE APPLICANTS**

**DECLARATION**

I hereby certify that the information supplied is correct and I undertake to furnish any original documents on request.

\_\_\_\_\_  
Signature of Applicant

\_\_\_\_\_  
Date



PROVINCE OF KWAZULU-NATAL  
DEPARTMENT OF EDUCATION

**APPLICANT'S PREFERENCE LIST**

Posts applied For in HRM Circular No.      of 2006

1. NAME OF APPLICANT	2. PERSAL NUMBER/ID
3. SCHOOL	4. CIRCUIT
5. DISTRICT	6. REGION

PREFERENCE ORDER	POST NO.	SCHOOL	POST DESCRIPTION
1			
2			
3			
4			
5			
6			
7			
8			
9			
10			
11			
12			
13			
14			
15			
16			
17			

\_\_\_\_\_  
APPLICANT'S SIGNATURE

PROVINCE OF KWAZULU-NATAL  
DEPARTMENT OF EDUCATION

**SHORTLISTING: ASSESSMENT OF CV**

1. SURNAME		2. FIRST NAMES	
3. PERSAL NUMBER		4. HRM OF 2006 POST NUMBER	
5. POST DESCRIPTION		6. POST LEVEL	REGION
7. SCHOOL		8. DISTRICT	CIRCUIT

CRITERIA

1	2
LEADERSHIP: ADMINISTRATIVE MANAGEMENT AND RELATED EXPERIENCE	ORGANISATIONAL ABILITY AND EXPERIENCE

SCORE	14	SCORE	7
-------	----	-------	---

3	4
PROFESSIONAL DEVELOPMENT, EDUCATIONAL EXPERIENCE AND INSIGHT	LEADERSHIP: COMMUNITY RELATED

SCORE	14	SCORE	7
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SCORE	42
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REMARKS

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	NAME	SIGNATURE		NAME	SIGNATURE
CHAIRPERSON			MEMBER		
MEMBER			DEPARTMENTAL NOMINEE		
MEMBER			CTU 'SADTU'		
MEMBER			CTU 'SAOU'		
MEMBER					
MEMBER					
DATE:					

PROVINCE OF KWAZULU-NATAL  
DEPARTMENT OF EDUCATION

**SCHEDULE OF SHORTLISTED APPLICANTS**

1. POST NUMBER	2. POST DESCRIPTION	
3. SCHOOL	CIRCUIT	DISTRICT
4. REGION	HRM OF 2006	

NO.	NAME	GENDER	PERSAL NO.	SCORE	TELEPHONE NO.
1.					
2.					
3.					
4.					
5.					
6.					
7.					
8.					
9.					
10.					

	NAME	SIGNATURE		NAME	SIGNATURE
CHAIRPERSON			MEMBER		
MEMBER			DEPARTMENTAL NOMINEE		
MEMBER			CTU 'SADTU'		
MEMBER			CTU 'SAOU'		
MEMBER					
MEMBER					
DATE:					

**PROVINCE OF KWAZULU-NATAL  
DEPARTMENT OF EDUCATION  
INTERVIEW COMMITTEE**

1. SURNAME		2. FIRST NAMES	
3. PERSAL NUMBER (If any)		4. QUALIFICATIONS	
5. YEARS OF SERVICE (If any)		6. POST NO.	
7. POST DESCRIPTION		8. SCHOOL	9..REGION
10.. DISTRICT		11.CIRCUIT	

SUMMARY OF ASSESSMENT

1	2
LEADERSHIP: ADMINISTRATIVE MANAGEMENT AND RELATED EXPERIENCE	ORGANISATIONAL ABILITY AND EXPERIENCE

SCORE	14	SCORE	7
-------	----	-------	---

3	4
PROFESSIONAL DEVELOPMENT, EDUCATIONAL EXPERIENCE AND INSIGHT	LEADERSHIP: COMMUNITY RELATED

SCORE	14	SCORE	7
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PERSONALITY AND HUMAN RELATIONS

SCORE	7
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TOTAL SCORE	49
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REMARKS BY INTERVIEW COMMITTEE

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COMMENTS BY OBSERVERS (If Any):

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	NAME	SIGNATURE		NAME	SIGNATURE
CHAIRPERSON			MEMBER		
MEMBER			DEPARTMENTAL NOMINEE		
MEMBER			CTU 'SADTU'		
MEMBER			CTU 'SAOU'		
MEMBER					
MEMBER					
DATE:					

PROVINCE OF KWAZULU-NATAL  
DEPARTMENT OF EDUCATION

**RECOMMENDED CANDIDATES**

1. POST NUMBER		2. POST DESCRIPTION	
3. SCHOOL		4. REGION	
5. DISTRICT		6. CIRCUIT	
7. HRM CIRCULAR NO	OF 2006		

NAMES OF RECOMMENDED CANDIDATES IN ORDER OF PREFERENCE

NO.	NAME	GENDER	PERSAL NO	SCORE	ADDRESS	TELEPHONE NO.
1.						
2.						
3.						
4.						
5.						
6.						
7.						
8.						
9.						
10.						

	NAME	SIGNATURE		NAME	SIGNATURE
CHAIRPERSON			MEMBER		
MEMBER			DEPARTMENTAL NOMINEE		
MEMBER			CTU 'SADTU'		
MEMBER			CTU 'SAOU'		
MEMBER					
MEMBER					
DATE:					

RATIFIED AT A FULL MEETING OF THE GOVERNING BODY HELD ON \_\_\_\_\_ 200 \_\_\_\_\_

\_\_\_\_\_  
Chairperson

\_\_\_\_\_  
Date Submitted

PROVINCE OF KWAZULU-NATAL  
DEPARTMENT OF EDUCATION

**DECLARATION BY MEMBERS OF THE INTERVIEW COMMITTEE AND SCHOOL  
GOVERNING BODY**

WE, THE UNDERSIGNED, HEREBY AGREE:

1. To observe STRICT CONFIDENTIALITY in respect of all discussions concerning the shortlisting/interviews of all discussions concerning the shortlisting/interviews of educators by not communicating details thereof to any persons not having authority to know these details.
2. To withdraw from the Committee should we have a personal interest (by virtue of a blood relationship or marriage) in any applicant for the post or we consider that a close friendship with an applicant compromises our impartiality in the selection process.
3. To abide by the decisions of the Committee and understand that decisions taken by the Committee will be binding on all members of the Committee.

**INTERVIEW COMMITTEE**

		NAME	TELEPHONE NO.	FACSIMILE NO.	SIGNATURE
CHAIRPERSON					
MEMBERS					
DEPARTMENTAL NOMINEE					
OBSERVERS	CTU 'SADTU'				
	CTU 'SAOU'				

**SCHOOL GOVERNING BODY**

		NAME	TELEPHONE NO.	FACSIMILE NO.	SIGNATURE
CHAIRPERSON					
MEMBERS					

Date: \_\_\_\_\_

Test items from an old exam paper:

QUESTION 1

CHANGE THE FOLLOWING STATEMENTS INTO DIRECT SPEECH:

- (a) Sifiso said that he had run short of money.
- (b) Mr. Brown complained that his shop was losing customers to the new supermarket.

NOW CHANGE THE FOLLOWING INTO REPORTED SPEECH:

- (a) "You must come to the soccer match with me, Molefi," said Joe.
- (b) "Don't sit so close at the fire," said Mother to the two children.

QUESTION 2

CORRECT THE WORDS IN BRACKETS SO THAT THEY ARE IN THE PAST TENSE:

- (a) James (go) to the gym every evening to build up his muscles.
- (b) As we (watch), everyone (gather) in the hall.
- (c) Nomawethu (say) that she (see) Bheki at the market the previous day.
- (d) The whole family (eat) together that day.

QUESTION 3

ARRANGE THE WORDS IN THE FOLLOWING GROUPS SO AS TO FORM A SENTENCE:

- (a) netball; day; Thandi; every; year; last; played.
- (b) mother; I; that; film; take; me; would; to; hoped; a; my.
- (c) expected; exam; she; but; pass; to; failed; she; the.

QUESTION 4

WRITE THE CORRECT PREPOSITION NEXT TO THE ALPHABET:

- (a) Come ..... me to the choir practice.
- (b) We played ..... a very good team.
- (c) Please discuss it with me ..... breakfast.
- (d) Many cattle died ..... hunger.
- (e) Bheki and Amos sat ..... the tree and talked.

under; against; after; with; against

QUESTION 5

WRITE THE ANSWER NEXT TO THE ALPHABET:

- (a) A.....bees
- (b) A.....fish
- (c) A .....tree
- (d) A .....grapes
- (e) A.....players

QUESTION 6

JOIN THE SENTENCES WITH THE CORRECT CONJUNCTION:

but; while; therefore; because; and

- (a) I wanted to go shopping. I needed a new track suit for the tour.
- (b) I polished the floor. Mother washed the dishes.
- (c) We looked at all the shoes. We bought one pair each.
- (d) She had been badly treated. She was very angry.
- (e) I wanted to attend the dance party. I did not have an evening dress.

QUESTION 7

COMPLETE THE FOLLOWING COMPARISONS:

- (a) as hungry as.....
- (b) as bold as .....
- (c) as brave as .....
- (d) as sure as .....
- (e) as free as .....

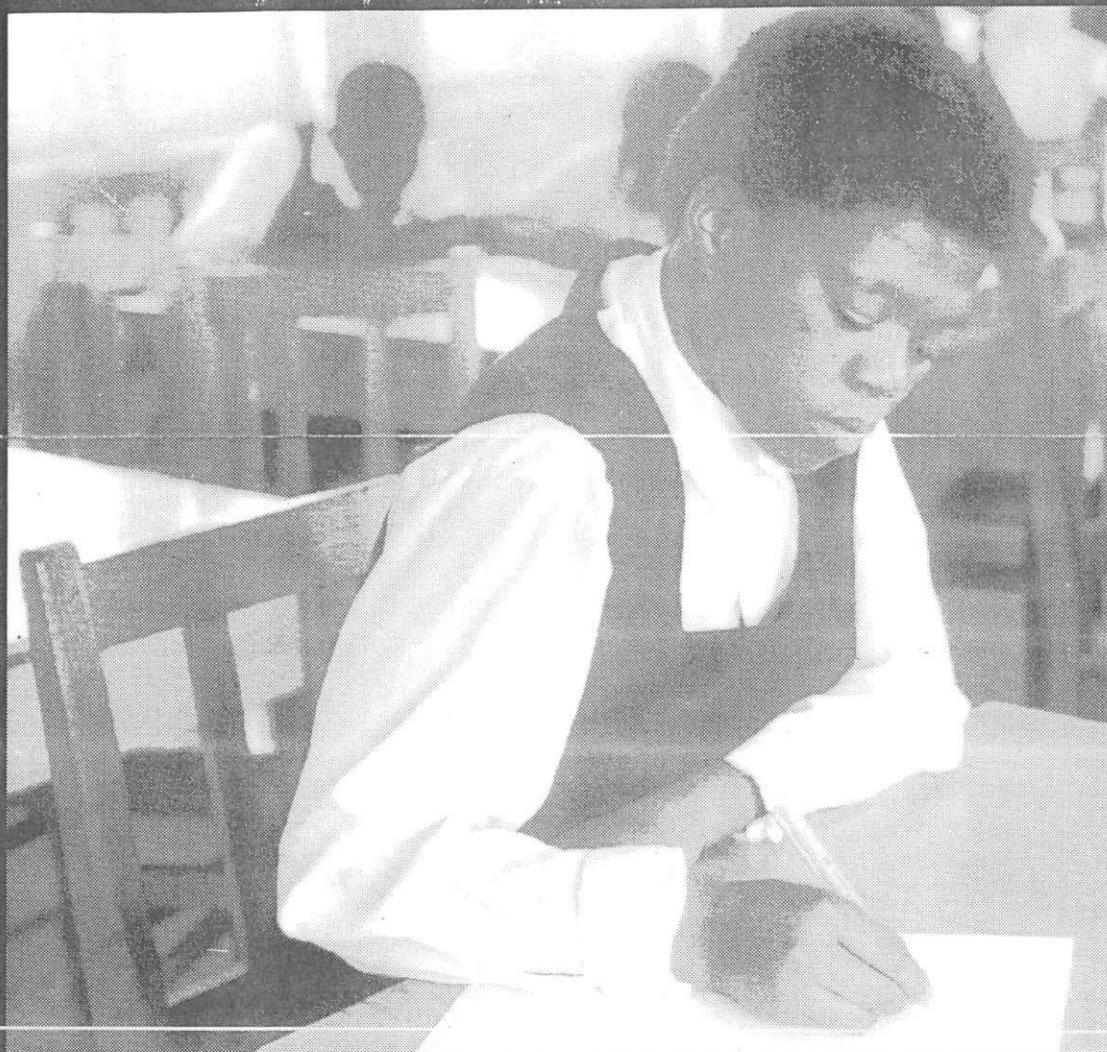
Now check your response against these comments:

- The sentences in the 'traditional' test items don't link together to make a meaningful context or situation. Two questions use only single words or phrases (Questions 5 and 7). Students need to know grammar for the sake of the test only, not as 'language in action'.
- The 'communicative' test items from our Standard Six exam **do** use continuous texts. In addition each task/question relates to the others in the paper through a common theme - gangs. The 'passage' for each task is also a meaningful, interesting communication.
- The communicative tasks express real language purposes, i.e. they are not just 'passages-with-questions'; they are conversations, posters, news-

separate sentences, out of context

What is a 'passage' in the real world?

# CHANGING YOUR EXAMINATIONS



**Changing your English tests and examinations -  
one step at a time**

---

**SECONDARY LEVEL**



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## 4. A teacher changes his English exam

In this chapter we will look at an exam developed by an actual teacher and follow his - and his students' - reflections about it. The teacher is Mr Jetro Bongani Mncwabe of Thuthuka School, Durban. He developed the exam at the end of 1994 with some assistance from ELET materials department (he was taking an inservice course in ELET courses department at the time and was therefore familiar with ELET's work).

*This is how Mr Mncwabe's thinking started to change:*

*"Because of my involvement with ELET projects and courses, I had been teaching my classes (Standards 5, 6 and 7) in a more communicative style for some time. They were accustomed to group work and discussion. We had been playing language games in class, talking openly on many issues, and working with newspapers and other available resources on a regular basis.*

*"My policy was to win the genuine interest of my students and avoid threatening and boring them. I wanted them to learn English the way we use it... in real life you can't take your ten English grammar sentences to West Street as a job-seeker and say "Here, look - I got ten out of ten!"*



*"So I felt at home with CLT (Communicative Language Teaching) - but the exam then became a problem. I thought: How can I teach students to communicate, and then when I test I change to a traditional- style exam? I was worried; everything seemed to be on my shoulders... I didn't want my students to suffer as I did with exams - very formal traditional exams. Even if you passed them, what did they mean to you? Nothing, as far as language to use was concerned."*

**What did Mr. Mncwabe do about this?**

*"First I decided that I must use students' own experiences when I chose passages or pictures. For example: they had recently taken a trip to Hibberdene on the South Coast, and I had a picture postcard showing the resort - I felt all this could be used somehow. Then I found an UPBEAT passage which although a few years old, dealt with warring groups of youngsters in the Natal Midlands - many students were familiar with these experiences and that area. I drafted tasks and consulted ELET materials department for comment and more resources."*

*What was the response of the class to this exam?*

*“Very positive. I had not of course told them exactly what questions they would get, but I had explained what **type** of questions they would be. When they actually saw the paper and, for example, the postcard of Hibberdene showing the place they had visited, they looked really interested and excited.*



*“Some of them even said that they thought the exam might have been too easy! They had expected to feel stressed and threatened in the situation. When they just felt interested, they thought that something must be missing...”*

When we asked the students themselves about the exam, several of them mentioned that they had liked the exam because it was about **things they knew and had seen**.

*How did the students perform in the exam?*

*“They all did better than usual, and everyone passed!” (Several students also commented enthusiastically on this).*

*What suggestions does Mr Mncwabe have for other teachers wanting to improve their tests and exams?*

*“Well - whenever you **teach** an area of the syllabus in a communicative style, give some thought to how you might **test** this area communicatively too. In fact ideally tests or exams could be set early in the year, so that teaching and testing are well co-ordinated.*

*The other important point is that you should **talk** with your colleagues about these issues. On our staff we are encouraged to discuss such issues and to develop our knowledge and skills by attending courses, conferences and so on. When we learn together and share ideas like this it is easier to introduce new approaches.”*



match your  
testing and  
your teaching



talk to  
colleagues

All these positive comments are very valuable, of course; but you as teacher may be wondering whether Mr Mncwabe’s approach will work effectively for **you** in your situation. In this chapter we look at one teacher’s exam and some general aspects of its design and implementation. However in the next chapter we will take a harder look at the exam, the thinking behind it, and how other teachers might apply some of these ideas in ways that suit them too. In Chapter 8 you will find further examples of more communicative-style exams that have been used by teachers.

The exam that Mr Mncwabe finally developed:

## ENGLISH COMMUNICATION: EXAMINATION

STANDARD

MARKS: 200

TIME: 2 HRS

### SECTION A

#### Question 1

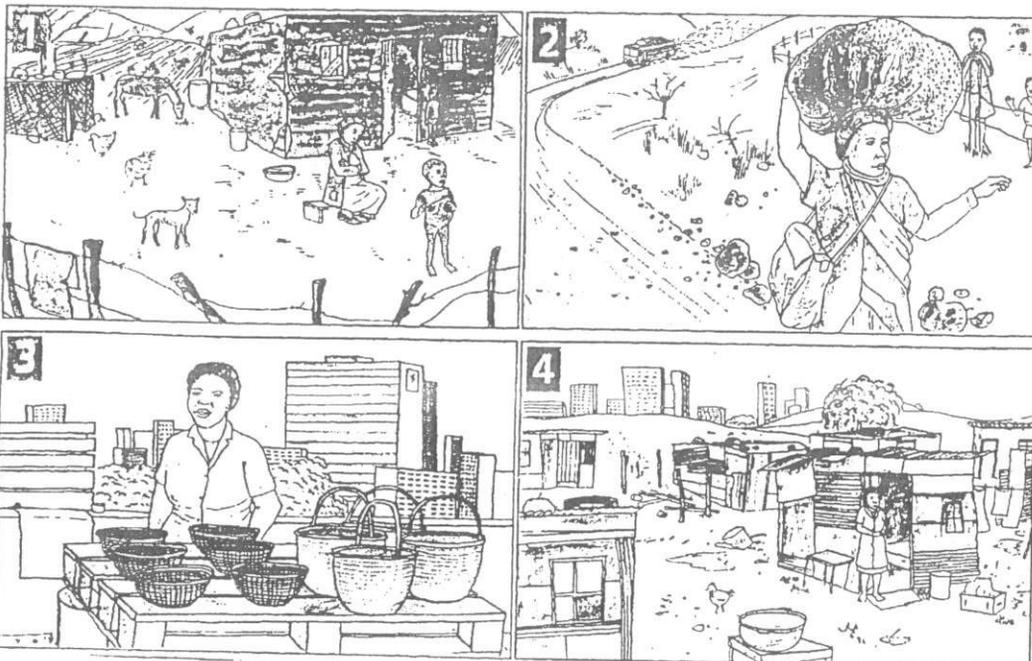
#### WRITING TASK:

**Instructions:** Study the following four pictures. Try to link or connect the pictures to make a story.

**Work like this:**

1. Write your own heading for the story.
2. Write an introduction for the story.
3. Write a few sentences to tell what is happening in each picture. Fit it into the story. The sentences for each picture should form a paragraph. Therefore the body of your story will have four paragraphs.
4. Then write a conclusion. This should tell what *you* think about what happened in the story.

[50]



**NOTE:**  
The margin comments next to the exam tell you broadly how and why the teacher obtained the texts or pictures used. The activities are discussed in more detail afterwards.

the teacher used pictures from the LEARN supplement in the *Daily News* for this writing task

many of the students in this class had had hard life experiences, and even lived on the streets... stories like this one in the picture were therefore familiar to them

the postcard the teacher used shows a fun-spot the students actually visited



the teacher provided writing-pad pages and envelopes to increase the 'authentic' feeling of the letter writing task

experiences like those in the passage were familiar to many of the students who wrote the exam

the teacher obtained the passage from UPBEAT magazine for teenagers. it was printed in the UPBEAT of May, 1988

### Question 2:



The above picture should remind you of your visit to Hibberdene. Now write a letter to a family member or any friend and tell him or her about your visit to Hibberdene. Use the writing pad provided, and address the envelope.

[20]

### SECTION B

#### READING:

Read the passage and answer the questions which follow it.



- A. Themba is a hero in front of his friends. They call him 'Kill them all and come back alone.' He is a skilled fighter after having spent hours practising with his weapons. He sleeps during the day because he has to go out at night on patrol duty. He is second-in-charge of The Scorpions and has 3000 'troops' under his command.

- B. Themba is only 14 years old. Where in the world does a boy become a soldier at so young an age?

In the province of Natal, near the town of Pietermaritzburg, there has been savage fighting for the last ten months. No one knows how many people have died, but by the end of February one group said that it was over 400.

- C. The fighting has been between Inkatha on one side, and UDF and Cosatu on the other. Many reasons have been offered as to why this fighting has taken place. But no-one has tried to answer how the fighting has affected different communities, especially young people.

- D. In Natal there are thousands of boys like Themba. They live like soldiers, not school children. They sleep during the day and fight at night. They don't go to school, but train themselves to use different kinds of weapons.

Themba says he became tough when he saw his friend die. 'I'm not scared to die,' he says, 'because I don't know what it is like to die.'

- E. 'Apart from avenging my friend's death, I had to continue with the struggle for freedom which we had dedicated ourselves to when we formed The Scorpions at the height of the terror.' When asked what he thought of using violence, he replied: 'Iso Ngeso.' (An eye for an eye). 'If they attack our people, must we sit back and relax?'

Half of the population of Natal are under 16 years old and many of the youth have been killed. These are the words of a 10-year-old schoolboy: 'We fight day and night. All the young boys are soldiers of the people. Sometimes things go bad. When they attack we fight them.'

- F. There is another side to this war. People have lost their houses, their families, their possessions. People are forced to flee from their communities and become refugees. Every war has refugees and Natal is no exception.

Thousands   1   families have lost their homes and have been forced   2   look for shelter   3   the bush, in church halls,   4   in the white suburbs of Pietermaritzburg. Things have been made worse with the floods in September last year,   5   destroyed many homes.

Do you think that this made the passage too 'out of date', or not?

Where do you obtain passages for reading tasks when you set exams and tests? Do you experience problems with this? See Chapter Five, page 31 and Chapter Seven, pages 55-56, for some ideas!

Are the questions on the reading passage similar to questions you have set, or not? If not, what are the differences? We will discuss these aspects in Chapter Five.

### READING TASK:

#### Question 1:

The sections of this passage have been labelled A to F. Each section has a heading, but the headings are placed in an incorrect or jumbled order below. Study the passage and write the correct heading next to the letter for each section.

- A. A province at war.
- B. How the boys live.
- C. Why Themba and the other boys fight.
- D. Themba the hero.
- E. The results of war in the community.
- F. Participants in the war.

[18]

#### Question 2:

Now write a short heading for the whole passage. The heading should sum up what the passage is about.

[2]

#### Question 3:

Read Paragraph F. You will see that some words are missing. Fill them in. (1-5)

[10]

#### Question 4:

In each paragraph, find a word that means the same as:

- Paragraph A: expert
- Paragraph C: causes
- Paragraph D: afraid
- Paragraph E: liberty
- Paragraph F: compelled.

[10]

## Question 5:



## STANLEY THE STROLLER



*Read Stanley's story. As you see, it is incomplete. Choose from the words supplied below and fill the gaps so that the story will be meaningful.*

**WORDS: of; left; streets; time; friend; children; working; excited; write; down; homes; future; money; chance; joined.**

Thousands of young people in South Africa live on the streets. For many the \_\_\_\_\_ 1 \_\_\_\_\_ are a safer place than their \_\_\_\_\_ 2 \_\_\_\_\_. But life on the streets, or strolling as the street-\_\_\_\_\_ 3 \_\_\_\_\_ call it, is not easy. Food and money are scarce. There is always the threat \_\_\_\_\_ 4 \_\_\_\_\_ being arrested. Most strollers live from day to day, with little hope for the \_\_\_\_\_ 5 \_\_\_\_\_.

A school in Cape Town is giving new hope to the strollers. Learn to Live gives streetchildren a second \_\_\_\_\_ 6 \_\_\_\_\_ to learn. It gives street children a future.

Stanley Naude \_\_\_\_\_ 7 \_\_\_\_\_ home when he was six years old. Life at home was 'te swaar.' He and a seven-year-old \_\_\_\_\_ 8 \_\_\_\_\_ spent their days riding the trains, up and \_\_\_\_\_ 9 \_\_\_\_\_. 'It was hard for me,' says Stanley. 'It used to take a long \_\_\_\_\_ 10 \_\_\_\_\_ to make \_\_\_\_\_ 11 \_\_\_\_\_. It was much more difficult to stroll in the old days.'

Then Stanley \_\_\_\_\_ 12 \_\_\_\_\_ the Learn to Live school. 'I was \_\_\_\_\_ 13 \_\_\_\_\_,' says Stanley. 'I couldn't read or \_\_\_\_\_ 14 \_\_\_\_\_. So this was my chance to learn.' Stanley took his friend, Kathleen Janssen, to Learn to Live with him. Today Kathleen is \_\_\_\_\_ 15 \_\_\_\_\_ in a hotel restaurant. She is on a six-month training course. Stanley has a good job as a painter.

[30]

(This passage is an extract from an article in UPBEAT No 7, 1993. UPBEAT is a SACHED publication)

Many of the students who wrote this exam had lived on the street in the past. They generally dislike the term 'street-children', feeling it carries a stigma. Their teacher therefore decided to eliminate it from passages like this one in future.

Exam papers of many years back have included 'gap-filling' tasks. Do you think this task is really any different, or not?

See Chapter Five for more discussion of these aspects.

Ex Appendix 14  
Extracts from Collective Agreement No. 8 of 2003 IQMS

**EDUCATION LABOUR RELATIONS COUNCIL**  
*Established in terms of the LRA of 1995 as amended*



**elrc**

EDUCATION LABOUR  
RELATIONS COUNCIL

# **COLLECTIVE AGREEMENT NUMBER 8 OF 2003**

**27 August 2003**

## **INTEGRATED QUALITY MANAGEMENT SYSTEM**

Three handwritten signatures are located in the bottom right corner of the page. The signatures are written in dark ink and appear to be initials or names of the signatories.

# INTEGRATED QUALITY MANAGEMENT SYSTEM

This document consists of four parts:

- Section A:** This contains information on the Integrated Quality Management System.
- Section B:** This consists of the Implementation Plan in the form of a flow diagram with a supporting narrative.
- Section C:** This consists of the instrument to be used for Performance Measurement, Development Appraisal and Whole School Evaluation.
- Section D:** Forms (Annexure A, B, C: PM for salary or grade progression)

**EXEMPLAR A**

**COMPOSITE SCORE SHEET FOR USE IN PERFORMANCE  
MEASUREMENT FOR PAY PROGRESSION AND GRADE  
PROGRESSION FOR Level 1 Educators (28 CRITERIA)**

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

PERSAL NUMBER : \_\_\_\_\_ SCHOOL : \_\_\_\_\_

PERFORMANCE STANDARDS	MAX	SCORE
Creation of a positive learning environment	16	
Knowledge of curriculum and learning programmes	16	
Lesson Planning, preparation, and presentation	16	
Learner Assessment	16	
Professional development in field of work/career and participation in professional bodies	16	
Human Relations and Contribution to school development	16	
Extra-Curricular & Co-Curricular participation	16	
<b>TOTAL SCORE</b>	<b>112</b>	

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

**COMMENTS/REASONS FOR ADJUSTMENT**

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To qualify for salary progression the educator needs to obtain : 56 (2)  
To qualify for grade progression the educator needs to obtain : 78 (3)

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

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

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

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

**EXEMPLAR B**

**COMPOSITE SCORE SHEET FOR USE IN PERFORMANCE  
MEASUREMENT FOR PAY PROGRESSION AND GRADE  
PROGRESSION FOR Level 2 Educators (42 CRITERIA)**

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

PERSAL NUMBER : \_\_\_\_\_ SCHOOL: \_\_\_\_\_

PERFORMANCE STANDARDS	MAX	SCORE
Creation of a positive learning environment	16	
Knowledge of curriculum and learning programmes	16	
Lesson Planning, preparation, and presentation	16	
Learner Assessment	16	
Professional development in field of work/career and participation in professional bodies	16	
Human Relations and Contribution to school development	16	
Extra-Curricular & Co-Curricular participation	16	
Administration of resources and records	20	
Personnel	16	
Decision making and accountability	20	
<b>TOTAL SCORE</b>	<b>168</b>	

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

**COMMENTS/REASONS FOR ADJUSTMENT**

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To qualify for salary progression the educator needs to obtain: 84 (2)  
To qualify for grade progression the educator needs to obtain: 118 (3)

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

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

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

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

**EXEMPLAR C**

**COMPOSITE SCORE SHEET FOR USE IN PERFORMANCE  
MEASUREMENT FOR PAY PROGRESSION AND GRADE  
PROGRESSION FOR Level 3 & 4 Educators (52 CRITERIA)**

EDUCATOR: \_\_\_\_\_ DATE: \_\_\_\_\_  
 PERSAL NUMBER : \_\_\_\_\_ SCHOOL: \_\_\_\_\_

PERFORMANCE STANDARDS	MAX	SCORE
Creation of a positive learning environment	16	
Knowledge of curriculum and learning programmes	16	
Lesson Planning, preparation, and presentation	16	
Learner Assessment	16	
Professional development in field of work/career and participation in professional bodies	16	
Human Relations and Contribution to school development	16	
Extra-Curricular & Co-Curricular participation	16	
Administration of resources and records	20	
Personnel	16	
Decision making and accountability	20	
Leadership, communication and servicing the Governing Body	24	
Strategic planning, financial planning and education management development	16	
<b>TOTAL SCORE</b>	<b>208</b>	

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

**COMMENTS/REASONS FOR ADJUSTMENT**

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To qualify for salary progression the educator needs to obtain: 104 (2)  
 To qualify for grade progression the educator needs to obtain: 146 (3)

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

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

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

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