

UNIVERSITY OF KWAZULU-NATAL

**A STUDY OF CAPACITY BUILDING STRATEGIES OF HEADS OF
DEPARTMENT, CURRICULUM CO-ORDINATORS AND LEVEL 1
EDUCATORS IN THE ECONOMIC AND MANAGEMENT SCIENCES
LEARNING AREA IN 5 PRIMARY SCHOOLS IN THE ETHEKWINI
REGION OF KWAZULU-NATAL DEPARTMENT OF EDUCATION**

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**DISSERTATION SUBMITTED IN PARTIAL FULFILMENT OF THE
REQUIREMENTS FOR THE MASTER OF EDUCATION DEGREE**

IN THE SCHOOL OF EDUCATION

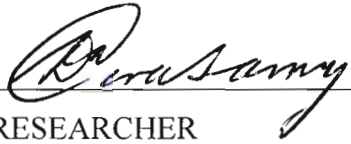
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FEBRUARY 2005

DECLARATION

I, RAJENDREN SABAPATHY DORASAMY, declare that this dissertation is my own work, and has not been submitted previously for any degree in any university.


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ABSTRACT

The dire need for capacitating Economic and Management Sciences (EMS) educators in subject-specific knowledge occurred to me whilst conducting workshops for EMS educators within the KwaZulu-Natal Department of Education. Educators often complained that they neglected EMS as a Learning Area as they lacked the requisite subject-specific knowledge. This, they claimed was exacerbated by the paucity of EMS educator and learner support materials. This prompted me to undertake a case study of the current capacity building strategies of heads of department, curriculum co-ordinators and level 1 educators in (EMS) Learning Area.

The case study was restricted to a cluster of 5 primary schools in the Ethekeini Region of the Kwa-Zulu Natal Department of Education. Schools were chosen on the basis of convenience, cost, proximity to each other and previous professional involvement with the schools.

Data were collected through questionnaires, interviews and observation at workshops. Findings suggest that there existed a lack of fundamental knowledge in the EMS learning area and further that current development strategies did not necessarily meet the needs of educators. Stemming from the research findings, the study recommends that continuous professional development of educators must be seen as an evolving set of activities that should respond to the specific contextual needs of educators at different stages in their lifelong development as professionals.

DEDICATION

Dedicated to the memory of my late Grandmother, Mrs Mungamma Dorasamy, who inspired in me the love of teaching and gave me my foundational exposure to entrepreneurship.

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CHAPTER 1

INTRODUCTION

1.1 BACKGROUND TO THE STUDY

This study seeks to investigate the professional development strategies of Economic and Management Science (EMS) educators in light of their new roles. These new and expanded roles arose as a result of the introduction of new groupings of subjects into Learning Areas and the introduction of a totally new Learning Area called the Economic and Management Sciences. Together with these new roles came the huge ‘down loading’ of responsibilities to primary schools. Concomitant with these responsibilities came the rise in expectations, such as curriculum management, financial management, etc. and greater calls for the accountability of schools from education officials and society at large for quality. Unprepared senior managers, such as principals and deputy principals, faced by such demands often resorted to what Lofthouse in Bush and West-Burnham (1994:35) called the “hot rivet game” where, responsibilities are often shifted down to middle management, such as heads of department. These in turn relegate important aspects such as curriculum development to curriculum co-ordinators, such as level 1 educators. According to Fullan (1972) curriculum change and innovation are likely to be more successful if practising educators are involved in the decision-making about curriculum issues. Thus, the expanded responsibilities for educators, such as curriculum development and management entails liaising with the broader community, school governing bodies, private sector and other stakeholders with a view to developing interdisciplinary approaches to the curriculum. Therefore, all curriculum co-ordinators are faced with the daunting task of attempting to connect their curriculum and learning responsibilities to the Curriculum Guidelines as prescribed by the Department of Education.

Tanner and Tanner (1980) argue that teachers, whilst having a vital role in curriculum development, must not be left on their own without help. Tanner and Tanner (1980) further point, that past

efforts to involve teacher in curriculum development revealed that teachers could contribute significantly to the development of new knowledge about the curriculum when they are provided with adequate resources and consultative and supervisory assistance. The past also revealed the pitfalls of expecting

teachers to conduct curriculum research without the help of qualified persons (Tanner & Tanner, 1980:xvi).

However, in South Africa, such rapid and sweeping changes have not necessarily been introduced with sufficient development of educators. Referring to the inadequate and appropriate development of teachers, Jansen (1999:7) had this to say:

This was followed by the introduction of a policy called continuous assessment in school, but again without any teacher preparation and with minimal guidance as to how this could be achieved and ... The sudden emergence of the proposal, bringing ordinary teachers into contact with a curriculum discourse completely foreign to their understanding and practices.

Therefore there seems to exist a huge gap between mission and vision of the Department of Education on the one hand and the capacity of curriculum co-ordinators for successful implementation on the other. If educators are not sufficiently capacitated, the danger therefore exists that educators might function at the “imitative-maintenance level” (Tanner and Tanner, 1980:636). Teachers may therefore seek compliance to policy guidelines through adherence to textbooks, workbooks and routine activities.

Curriculum development and curriculum change aim at maximizing the effectiveness of teaching and learning. Lofthouse in Bush and West-Burnham (1994:125) argues that “all schools exist to provide pupils with quality learning experiences” through the formulation and implementation of sound curriculum strategies. The Curriculum, therefore, is to be thought of in terms of “activities and experiences rather than knowledge to be acquired and facts to be stored” (Bush and West-Burnham, 1994:128). This then leads to another related concept – “Curriculum effectiveness” A Curriculum is effective if it can appropriately interact with educators’ competence to facilitate educator performance, help learners gain learning experiences that fit their needs and produce educational outcomes in line with the stated Curriculum Statements. Thus, one of the key factors likely to influence curriculum effectiveness in South Africa is the educators’ knowledge of the subject content and generic principles of Outcomes Based Education (OBE). My experiences with educators seems to suggest that educators are not knowledgeable in the EMS learning area, thus impacting negatively on their ability to develop and manage the EMS curriculum.

There seems to be a downstream problem that inadequate fundamental knowledge of the principles of OBE and subject specific content in the EMS Learning Area, leads to poor curriculum development and implementation. Whilst acknowledging that

various factors influence curriculum management, the expanded role of educators as curriculum managers requires continuous capacity-building programmes on their part. Without sufficient capacity building strategies, the expanded role of educators could become disempowering to educators. Such programmes should entail the development of fundamental knowledge in the EMS Learning Area as well as knowledge on the generic principles of curriculum development and management. Currently, it is not clear whether or not educators facilitating EMS in the intermediate and senior phases in the primary schools are knowledgeable about the subject or whether strategies are effective in capacity building.

1.2 PURPOSE OF THE STUDY

The purpose of this study is to examine current capacity building strategies of EMS educators in place in terms of their nature and their extent of effectiveness and the attendant challenges with particular reference to primary schools in one district in the Ethekwini Region in Kwa-Zulu Natal.

1.3 STATEMENT OF THE PROBLEM

There is little contention that teachers need to know the subject matter that they are teaching and moreover, they need to know how to present this clearly to learners. In their analysis of the relationship between knowledge and practice in teaching Cochran-Smith & Lytle in Adler and Reed (2002:1) argue that, “Teachers who know more teach better”. Although there may not be consensus on what “*knowing more and teaching better*” (Adler, 2002:1) means, this simple idea should guide the practice of all teacher development programmes. However, despite the fact that teachers attend workshops, EMS teachers are still unsure as to what and how to teach in the EMS learning area. This could be indicative in part of their lack of the fundamental knowledge in the EMS learning area and/or lack of sufficient knowledge on generic issues surrounding Outcomes Based Education and integration of EMS with other learning areas.

1.4 RESEARCH QUESTIONS

In order to address this question of facilitating the EMS curriculum effectively, the study is guided by the following specific questions:

- 1.4.1 Do heads of department, curriculum co-ordinators and level 1 educators have fundamental knowledge in the EMS learning area?
- 1.4.2 Are current development strategies sufficient and effective in capacitating heads of department, curriculum co-ordinators and level 1 educators to manage the EMS learning area?
- 1.4.3 What are the challenges being faced in these processes?

1.5 SIGNIFICANCE OF STUDY

Given that “the most critical challenge to teacher education in South Africa is the limited ‘conceptual knowledge base’ of many teachers” (Taylor and Vinjevold in Adler and Reed, 2002:4), it becomes imperative that educators become life long learners. On the basis of findings of this study, it is hoped that appropriate in-service capacity building education programmes will be designed. It is further hoped that these programmes will assist to empower educators in facing the exciting challenges of education in South Africa.

1.6 DELIMITATIONS

The sample for this research study consists of one cluster of 5 schools situated in the Phoenix North district within the Ethekwini Region in the Kwa-Zulu Natal Department of Education. The focus of this study is on professional development of Economic and Management Sciences teachers from Grade 4 to Grade 7 in the primary school.

1.7 LIMITATIONS

This research, whilst being informed by universal norms and standards regarding capacity building strategies, draws its conclusions from interactions with EMS educators from one district in the Ethekwini Region of Kwa-Zulu Natal. Therefore the findings may not be generalisable to the entire teaching corps of South Africa.

1.8 DEFINITION OF TERMS

1.8.1 CURRICULUM

For the purposes of this study, the term “curriculum” is used in a wider sense to be inclusive of the “official” curriculum, the “actual” curriculum and the “hidden” curriculum.

1.8.2 HEADS OF DEPARTMENT

These are educators who hold a promotion post on level 2 and are responsible for the overall management of a phase or of a group of learning areas. They enjoy positional authority.

1.8.3 CURRICULUM CO-ORDINATORS

In this study curriculum co-ordinators refer to those educators on post level 1 who have been delegated the responsibility of curriculum planning and to assist in the management of a grade or a phase.

1.8.4 FUNDAMENTAL KNOWLEDGE

Fundamental knowledge refers to knowledge that is essential for a teacher to function effectively. It includes subject specific knowledge, pedagogic subject knowledge and generic knowledge of Outcomes Based Education.

1.8.5 PROFESSIONAL DEVELOPMENT

Fullan (1992:77) defines Professional Development (PD) as “the sum total of formal (eg workshops) and informal (eg peer interactions) learning experienced by teachers and others”. Thus, in this study PD refers to all the activities engaged in by teachers to enhance their knowledge, skills and attitudes in order to educate children more effectively.

1.8.6 LEARNING AREA

A group of related subjects grouped together as a learning area.

1.9 ORGANISATION OF THE STUDY

This chapter has described the problem and its setting. Chapter 2 reviews literature around continuous professional development and support of educators to develop appropriate development strategies for teachers. Chapter 3 describes the research methodology used in this investigation. Chapter 4 presents and discusses the data. Chapter 5 draws conclusions and recommendations emanating from the study.

CHAPTER 2

LITERATURE REVIEW

2.1 INTRODUCTION

The purpose of this study is to investigate the current capacity building strategies of heads of department, curriculum co-ordinators and level 1 educators in the Economic and Management Sciences (EMS) learning area. This chapter on literature review of professional development (PD) provides a theoretical perspective for this study. Chapter 2 therefore provides a description of what professional development is and the reason for professional development of educators. It also outlines the aims of in-service education and training (INSET), the PD approaches and enumerates some of the challenges of professional development. It concludes with emerging issues for professional development.

2.2 THE CONCEPT OF PROFESSIONAL DEVELOPMENT

The notion that the professional development of educators hinges solely on the number and type of in-service and/or orientation courses organized for them by outside agencies is rejected by a number of authors (Hoyle and Megarry, 1980:50; Hoyle in Harris, Lawn & Prescott, 1982:344; Skilbeck, 1984:254 and Daresh, 1987:3). True, such provisions do contribute to the professional development of educators but “forces both inside and outside the teaching profession now have adopted the stance that the teacher must be a continuous learner” (Ryan, 1984:352). Hence, it is now “the responsibility of every educator to take responsibility for their own learning” (Department of Education - National Curriculum Statement, 2004) and adopt a policy of “Lifelong learning” (Coutts, 1995:117). However, it is the commitment of educators to their professional responsibilities, and the opportunities that exists for them to function as autonomous professionals, that determine their real professional development.

This study is based on the premise that professional development of educators must include aspects of curriculum development. Accordingly, Fullan (1992:67) argues that, “Professional development must become more curriculum and job embedded” – training fit-for-purpose. It works both ways: “when contemplating a curriculum

priority, build in some ongoing professional development; when contemplating a professional development event, link it to curriculum priorities and follow through” (Fullan, 1992:67), that is, they must form part of a plan. This, however, does not discount the importance of other development strategies such as university courses, one-day workshops, etc as they serve different purposes such as awareness of new ideas, a chance to meet peers, etc. These are valuable and necessary; especially in keeping with the requirements of the Continuous Professional Development and Support (CPDS) policy document (KZN DoE - 2003) requiring educators to accumulate points towards their professional development. However, when it comes to local-level curriculum priorities, professional development must be incorporated as part and parcel of an implementation plan.

The literature on the concept of ‘professional development’ and its definitions are voluminous. Professional development is achieved through CPDS that includes pre-service education and training as well INSET. However, CPDS has a broader context than being narrowly defined within the parameters of pre-service and in-service training. This is because professional development in education is now conceived as a continuum of lifelong learning extending from initial professional qualification followed by intermittent refresher and orientation courses. Pather (1995:61) therefore claims that no matter how thorough or systematic PRESET education is, it cannot prepare a teacher to respond successfully to all the demands and changes he will encounter during a career spanning forty odd years. It implies

Education professionals with an attentive and responsibly independent attitude engaged in the on-going pursuit of proactive professional learning and development (KZN DoE Policy Document for CPDS – July 2003).

Bush & West-Burnham (1994:285) alluded to professional development in education embracing related concepts. Firstly,

Professional Development is seen as a process, spanning an individual’s career, whereby the teacher continues to develop the knowledge and skills required for effective professional practice as circumstances change and as new responsibilities are accepted.

Secondly is the notion that “knowledge acquisition and skills development should ... be more directly related to the substantive problems faced by teachers” (Bush,

1994:285), to “improve job-related skills, knowledge and attitudes of staff” (Cheng, 1996:129).

This perception of professional development highlights the dynamic nature of development needs for “organizational aim” (Cheng, 1996:129), through “maintaining staff efficiency” and for personal growth of educators through “career prioritization” (Cheng, 1996:129). This suggests that development activities, whilst being underpinned by theoretical imperatives, must be contextualised to reflect and build on actual teacher and organizational experiences.

However, authors such as Rust (1990) and Cheng (1996) agree that traditional approaches to training has been externally controlled and planned with a top-down management approach sharing one common characteristic: “the trainee as the ‘empty vessel’” (Rust, 1990:95). This implied that teachers were deficient in some particular knowledge and skills and those trainers and administrators understood better and more wisely the teaching processes. This necessitated what Shaeffer in Rust & Dalin, (1990:95) called “teacher-proof lessons must be transmitted to new and practicing teachers”. Hence, some authors have espoused a distinction between in-service training and in-service education. Eraut in Bush & West-Burnham (1994:286) argued that in-service training involved activities “in which a teacher-employee is told what to do and how to do it” which Lanier in Rust & Dalin (1990:95) called “teacher training because it is all form and no substance and has no faith in teacher’s judgment”. This leads to what Hoyle in Harris, Lawn and Prescott (1982:282) called “the restricted professional – who is mainly interested, for e.g., in children and classroom teaching”. Whereas in-service education, is considered as a process “in which a teacher-professional is supported in his task of trying to answer the questions for himself” (Eraut in Bush & West-Burnham, 1994:286) which, Lanier in Rust and Dalin (1990:95) refers to as “professional teacher education”. Hoyle (in Harris, Lawn & Prescott, 1982:282) refers to this as “the extended professional, who is, in addition, also interested in, for e.g. attending courses of a theoretical kind and participating in decision-making”.

An example of this debate contrasts the teaching of new skills to the inculcation of a new conception of teaching which Avalos in Rust and Dalin (1990:96) calls the “skill development” and the “model’ approaches. The former concentrates on “changes in discrete teaching techniques” whereas the latter on a “thorough restructuring of the

trainee's conception of teaching" (Rust, 1990:96) on the basis of broader educational perspectives.

The distinction between in-service training and in-service education emanates from the way needs analysis is conducted. A training perspective is "intended to provide externally identified solutions to problems associated with curriculum delivery by teachers as employees" (Bush, 1994:286). Needs analysis is extrinsic, normally divorced from educators' inputs. This type of development keeps the educator at an "Imitative-Maintenance Level" (Tanner and Tanner, 1980:636) whereby a multiplicity of isolated skills development activities is treated as dead ends rather than as means of generating further learning. Teachers at this level are concerned with curriculum maintenance leading to what may be termed 'professional compliance'.

An education perspective, on the other hand, identifies with the professionalism of educators and encourages the analysis of problem and potential solutions by professional educators themselves. "Needs analysis is of necessity intrinsic, conducted in the context of self-generated priorities" (Bush, 1994:286). This perspective leads educators to either the "Mediative level" or "Creative-Generative Level" (Tanner and Tanner, 1980:638). Mediative level is the level at which curriculum packages are adapted, accommodated, adjusted and integrated by innovative educators who fall short of the necessary reconstruction for substantive problem-solving. Creative-Generative level is where educators reflect on what they are doing and attempt to find more effective ways of working. Educators are able to diagnose their problems and formulate hypotheses for solutions.

This has provided a broad perspective of what professional development is. It alludes to the need for a shift in paradigm in programme developers to no longer conceive of educators as recipients of knowledge alone but as constructors of knowledge as well. Development strategies should, based on the purpose of development, be developmental in nature. It should take on the education perspective rather than the training perspective especially for the Economic and Management Sciences educators in primary schools.

2.3 THE GROWTH OF PROFESSIONAL DEVELOPMENT

The multiplicity of INSET programmes stemming from the dichotomy between Pre-set and INSET training necessitated comprehensive and theory based schemes to

explain the differences between programmes in terms of certain basic principles. Thus, two schemes, one using the question “what for” and the other “for whom” (Murphy, 1987:18) provided descriptive variations among INSET programmes. The question “what for” (Jackson in Murphy, 1987:18) gave rise to two basic approaches to INSET training, which were called the “defect”, and the “growth” approaches (Murphy, 1987:18).

The defect approach oscillates between two perspectives, i.e. ‘obsolescence’ and ‘inefficiency’ (Murphy, 1987:18) along a time continuum. Obsolescence, which is curable through relevant training, occurs because of teachers’ limited basic training; teachers not keeping abreast with their subject knowledge or teachers being ignorant of the latest educational development. A classic example of this is the advent of computer technology through which voluminous amount of relevant information can be accessed from various web sites. However, if educators aren’t computer literate, although appearing irrelevant to their learning area, they become ‘obsolete’ because of their inability to access latest educational developments.

Inefficiency, however, relates to the skills of the educator. The cure here, whilst disputed, revolves around issues such as ‘supervision, competency-based teacher education or performances of pupils reflecting on teachers’ tenure” (Murphy, 1987:19). Typically, the defect approach is behaviourally oriented.

The Growth approach begins with the acknowledgement that “teaching is a complex and multifaceted activity” and “the motive for learning ... is not to repair personal inadequacy ... but to seek greater fulfillment as a practitioner” (Murphy, 1987:19). This approach recognizes and acknowledges the professionalism of teachers.

A second classification principle of development programme is based on the question “for whom”. Should organizational or individual’s needs serve as the basis for development programmes?

Traditionally, INSET activities, being highly system-centered, were orientated towards organizational needs expecting individuals participating in such courses to acquire skills and habits that would respond to organizational imperatives. Van den Berg and Hartshorne (in Pather, 1995) referring to the detached courses that this model generates, acknowledges that the realities of the individual South African

school contexts from which the participants come, have little or no bearing in the course programme. Thus, those that initiate such courses pretending “to know what the needs of the organization were and determined the framework of the studies accordingly” (Murphy, 1987:19) leads to what Henderson and Perry in Pather (1995) referred to as the existence of mismatch between the needs of a teacher and the course content.

The definition from Main in Murphy (1987:19) reflects this rationale:

is the planned influence of an individual’s psychological process, whose purpose is to gain from staff an attitudinal commitment to the philosophy, values and goals of an organization.

In contrast to such a system-centered approach, recent INSET programmes placed greater emphasis on needs of individual through helping create opportunities for promotion, coping with stress and gaining greater satisfaction from his/her work.

However, closer examination of INSET programmes reveals that they are neither solely system- nor individual-orientated but rather a combination of both with varying degree of emphasis contingent upon circumstances. Fullan (1992:114) therefore argues, “teacher development and school development must go hand in hand. You cannot have one without the other”. Hence, when preparing INSET programmes and activities, designers should be cognizant of observed defects; hedge against future needs and seek “congruence of domain, actors and levels” (Cheng, 1996:87). INSET programmes should harmonize between needs of individuals and organization. The widely quoted definition of Piper and Glatter in Murphy (1987:20) bridges the gap between the above-mentioned programme modalities. Their definition is

... a systematic attempt to harmonize individual’s interests and wishes, and their carefully assessed requirements for furthering their careers with the forthcoming requirements of the organization within which they are expected to work.

This indicates that the complexity of teaching heralds an urgent need for professional development of educators. Professional development needs are dynamic, cyclic and often spirals to higher plains. Merely conducting a series of workshops from a top-down approach, does not necessarily meet the needs of the organization or the individual educator. Professional development strategies should therefore be ‘needs-driven’ and contextually sensitive to bringing about any lasting benefit.

2.4 AIMS OF INSET

Taylor and Vinjevoold, in their 1999 Presidents Education Initiative Report (as cited in Adler and Reed, 2002:137), drew a correlation between teachers' conceptual knowledge, student learning and pre- and in-service teacher education. Their report strongly suggests "teachers poor grasp of the knowledge structure ... acts as a major inhibition to teaching and learning ... and that this is a general problem in South African Schools". This could further be exacerbated if claims made by Baines in Coleman and Anderson (2002:204) that teachers' role could change to one in which s/he is

the key manager with information needs, strategic decision-making responsibilities, a direct relationship to the requirements of accountability and a fundamental involvement in the strategy of improvement

aren't matched by appropriate capacitation of educators and administrators. Accordingly Caldwell and Spinks in Bush and West-Burnham (1994:266) have argued, "devolving power to institutions should be matched by the empowerment of people inside schools".

Bell in Coleman and Anderson (2002:188) further reinforces the need for empowerment by arguing that

teachers should not be expected to take in responsibilities for which they have not been prepared and which is not within their sphere of competence. Nor should their work be subject to arbitrary change.

Therefore effective deployment should match the competences and experiences of staff with the demands being placed on them. More flexible staff deployment can be achieved through various forms of in-service training. Therefore, all staff in schools should benefit from a well-structured professional development programme, which Pather (1995:vi) argued "there was no structured, documented national or regional policy for INSET". In an attempt to empower educators in thinking in new ways about school and classroom management, Adler & Reed (2002:2) claim

in the more all-embracing social, political and educational changes in post-apartheid South Africa, in-service professional development is seen as critical to repairing, redressing, professionalising and changing educational practices.

Therefore it must be readily accepted that there must be a correlation between the definitions of INSET and its particular objectives.

A guiding principle aim for professional development can be drawn from a framework for expansion, which states that

there is no major profession to which a new entrant however thorough his initial training, can be expected immediately to make a full contribution. Teachers in their first teaching posts need, and should be released part time to profit from, a systematic programme of professional initiation and guidance, and further study where necessary (Murphy, 1987:23).

Accordingly, the continuum of personal and professional needs of educators span his/her entire career oscillating between induction needs for orientation; extension needs for new roles; refresher courses to keep from being obsolete and conversion needs for internal redeployment.

Whilst aims for INSET training abound, some of the more salient ones as enumerated by Murphy (1987:22) and Murphy in Pather (1995) are:

- The integration of experience with theory
- Provision for upward mobility
- Supplying teachers for the systems
- Combating ‘burn-out’ of teacher
- Educating teachers to serve as initiators of change and change agents.
- Management of change

It is necessary to discuss each one of these aims in detail.

2.4.1 THE INTEGRATION OF EXPERIENCE WITH THEORETICAL STUDIES

According to Carr (in Murphy, 1987) there exists a gap between theory and practice at both initial and in-service levels. At the initial training level there is a tendency to regard institution work and school practice as separate parts of a course of training whilst at the in-service level, teachers are often left bewildered by the vast amount of reading, much of it indigestible, that is required of them. Jansen (1999:9) captured this most succinctly when he wrote “one of the most striking features of South African OBE that it has possibly generated the most extensive vocabulary to accompany a curriculum reform initiative in the twentieth century”. The fallacy of separating theory and practice is still being perpetuated by the Department of Education whereby the Teacher Development Strategy for the Further Education and Training phase (FET) involves orientation to be conducted by department officials

and targeted subject-specific knowledge being outsourced to higher education institutions separately.

There is an urgent need to integrate experience and theoretical studies in INSET courses. Without these, teachers have difficulty in combining classroom experience with educational theory. Wasp (in Murphy, 1987:22) aptly asks the question “How can this gap between theory and practice be bridged and how can teachers be encouraged to construct their own cognitive maps to make theoretical sense of adverse classroom practice?” One purpose of INSET therefore, must be to answer this question, and providers must build material into in-service courses that is theoretically rigorous and yet practically applicable. If the aim is to improve teachers’ understanding of educational theory by integrating it with experience is to have relevance in any INSET strategy; educators must be empowered on current educational theories with appropriate combination of practice. Joyce and Showers (in Murphy, 1987) being cognizant of this integration proposed a unique model which they referred to as ‘on site coaching’ of teachers, to enable them to translate theory into practice through theory, observation and practice. What these writers were advocating was for continued support (discussed in detail later) being provided to educators. This also implies using the school as a continuous training ground, through general staff room discussion, the sharing of experiences through such practices as “shadowing’ in which younger teachers observe experienced colleagues at work.

However, with the introduction of Economic and Management Sciences (EMS) as a new learning area, most educators in the primary school have very limited experience in teaching the EMS curriculum. Furthermore, a probable lack of content knowledge in EMS combined with the limited experience of educators necessitated a major paradigm shift among primary school educators. Teachers need to acknowledge that content and methodologies for EMS is different from that of other learning areas taught and as such INSET programmes would be the best means of integrating their current experience with theoretical knowledge of EMS. It is therefore recommended that INSET programmes should seek strategies to combine relevant theory with practice.

2.4.2 PROVISION OF UPWARD MOBILITY

Upward mobility and promotion are important objectives on INSET. In South Africa, the recent government legislation on the basic acceptable qualification has meant that teachers must follow INSET courses to gain promotion and obtain a rise in status and salary. Gardner (in Murphy, 1987:25) drew a correlation between upward mobility within the profession and the provision of INSET and further stated “the most important quality that INSET must have is that it should be seen by the teacher to be necessary to him personally”. The following quotation from Gardner’s writing in 1979 quoted in Murphy (1987:25) has particular relevance for the South African education system in the current context:

If credits for in-service courses are needed at certain points throughout the teacher’s career and if without these credits the teacher is debarred from moving up his salary scale or is debarred from promotion to more senior positions, a powerful incentive is added for the teacher.

Recent developments in South Africa make it mandatory for educators, irrespective of their qualifications and years of experience, to continually accumulate credits through various INSET courses for professional and organizational development and for their pay progression. However, Van der Berg (in Murphy, 1987:25) suggests that

no matter what the legal compulsion to attend courses or what the incentives are, it is the total involvement of teachers, their motivation and commitment that are essential if any lasting benefits are to be derived.

Pather’s (1995:46) findings that “teachers may respond to INSET sporadically or whenever they feel they have the time” reinforces Van der Berg’s assertions (in Murphy, 1987:25) that even national plans do not work “if teachers are neither willing nor able to implement national proposals, effective reform is not possible”.

It is therefore suggested that those concerned with provision of INSET programmes must recognize that educators that hold promotion posts, are relevantly capacitated in both methodologies and content of EMS. This empowers educators in supervisory positions to provide effective support to all educators teaching EMS. It must also be noted that no matter what the extrinsic motivation may be for professional development, teachers’ intrinsically motivated total involvement is of paramount importance if any lasting benefit is to be derived. This implies that the educator must see INSET benefiting not only the organisation but as being catalytic to harmonizing his/her needs with that of the organization’s.

2.4.3 SUPPLYING TEACHERS FOR THE SYSTEM

Murphy (in Pather, 1995:47) has identified “high population growth rate and a serious shortage of adequately qualified teachers” as a basic problem facing education systems in developing countries. In South Africa, apartheid has bequeathed a large number of un- and under-qualified teachers within the ‘third world’ constituency of South Africa. According to Pather (1995) in 1993, there were 22% of un- and 70% under qualified teachers in the Department of Education and Training and KwaZulu Department of Education and Culture. Pelsier (in Pather, 1995) had projected that by the year 2000 there would have been shortfall of 15 103 teachers in KwaZulu-Natal. An explosion of primary enrolments, like in many other African and developing countries, further exacerbates this scenario. Limited financial resources, training facilities and time are factors that would prevent the training of teachers on a large scale. Authors such as Klassen, Lauwerys, Kelly and Murray (cited in Murphy, 1987) argue that there is general consensus among planners in developing countries that INSET is an effective means of solving the problem of poorly qualified teachers. Even in industrialized countries where citizens complain that the education system may be misaligned with the requirements of society, use of INSET programmes could combat this malaise.

Another salient point raised by Husen (in Murphy, 1987) was the wholesale transference of colonial education systems to developing countries without essential modifications. It was taken for granted that it would be suitable for societies of quite different economic, cultural and social structures. Husen therefore concluded that it was no wonder that these developing countries were beset with problems of relevancy and a lack of competent teachers (Murphy, 1987).

The legacy of the Apartheid era, major curriculum reform and the introduction of EMS as a new learning area reinforce the importance of appropriate and innovative INSET programmes for professional development of our educators. Although, in the context of developing countries, INSET programmes may be viewed as a crisis management tool to combat the shortage of qualified teachers through ‘emergency’ short courses, INSET must be seen as a permanent feature in the education landscape.

Furthermore, education and educator needs constantly change resulting in non-coherence between organizational and individual needs. Thus INSET can be seen as a means of coherence making on an on-going basis.

2.4.4 COMBATING ‘BURN-OUT’

Teachers all over are leaving the profession not only because they and their families cannot survive on their salaries but also because the proper conditions to practice their professional job no longer exists. High stress caused by the lack of proper conditions in the nature of the school setting itself is therefore an equally significant reason for the demise of teaching. According to Corrigan (in Murphy, 1987:29) and Pather (1995:51) several studies show that “teaching is listed as one of the most stressful occupations” attributable to the following factors:

Low esteem and lack of appreciation by the public: educators’ morale is especially low as a result of various factors. EMS as a new learning area is one such factor that was introduced without sufficient capacitation of educators.

Excessive paper work, especially in terms of continuous assessment and requirements for integration across learning areas in the South African context: Teachers are expected to teach, assess, mentor and continually keep copious notes on learners’ progress. This is expected of them across many learning areas and over many different grades. Most importantly, according to Jansen (1999) these are expected without relevant capacitation of educators.

Unreasonable workloads, large classes crammed into small classrooms and the accompanying problems of discipline – teachers were not capacitated to handle this sudden externally imposed change of working with large classes that have concomitantly increased their workloads.

Lack of relevant learner and educator support materials: With the introduction of the OBE system of education, many educators have found that they could no longer rely on the textbooks as a media resource. Lack of adequate funding to schools, high rate of unemployment, coupled with the teachers’ low salary, meant that neither the school nor teachers were able to purchase “OBE” relevant resource materials. Whilst much

reform has been undertaken, the funding formulas have not been sufficiently revised to cater for the previously disadvantaged schools and are therefore under-resourced.

Pather (1995:52), through his research in KwaZulu-Natal has found additional problems such as “endemic violence in several Black townships” and “cross-fire of ethnic and political differences” contributes to stress.

Accordingly, Klassen and Leavitt (in Murphy, 1987:29) argue that INSET programmes must be provided to prepare teachers to “serve a broader range of education needs, and if they are not, then the likelihood is that they will be unable to cope, and the consequences of that are nervous exhaustion, frustration and eventual burn-out”.

Christiansen (in Murphy, 1987) suggests, that the best learning environment is one that not only meets the needs of the student, but also in which the teacher receives emotional and administrative support. Accordingly INSET should not only help teachers to keep up with the profession, but should also include provision for combating the ‘burn-out syndrome and create opportunities to develop a sense of personal renewal, continued confidence in abilities, and new development in various fields of study.

2.4.5 EDUCATING TEACHER TO SERVE AS INITIATORS OF CHANGE AND CHANGE AGENTS

Before attempting to relate INSET programmes with teacher as change agents or initiators of change, a broader perspective on change and its corollary terms must be understood. It is essential to understand the relationship of implementation not only to innovation but also to teacher development. Simply, implementation is “learning to do and learning to understand something new. Implementation focuses on what happens in practice” which is the nature and “extent of actual change, as well as the factors and processes that influence how and what changes are achieved” (Fullan, 1992:21). Change in other words is a process of learning new ideas and things. Innovation is something that is new to the people encountering it for the first time. Dealing with innovations effectively means alterations in behaviour and beliefs. Thus, the key issue from an implementation perspective is how the process of change unfolds as compared to what people do and think in relation to a particular innovation.

The implementation perspective forces us to confront what is happening in practice. This is why in-service and professional development in support of specific innovation is usually found to be the critical factor for success.

With the new implementation perspective in mind, it must be noted that change is either externally imposed or internally generated. With greater demands being imposed in education through tremendous economic and technological developments in society, schools are compelled to change and develop continuously to satisfy the rapidly growing needs of education.

Whether a school should implement changes or not depends on one hand on the external factors such as political, economical and society, which directly or indirectly pushes the school to respond. On the other hand, the internal factors such as new principal, etc., which cause the school to change its organizational structure and process. The ability of schools to adapt to changes in internal and external environment is contingent upon continuous development of its educators. Gerdes et al and Kathrada (in Pather, 1995) regard the teacher as a change agent. Therefore, “if educators are the main mechanisms to give operational effects to education for industrial innovation and societal renewal, they too need to be relevantly capacitated” (Jansen, 1999:28). However Pather (1995:70) argues “teachers must not be seen as recipients of change but also as initiators”. Pather (1995:70) further contends “if teachers are recipients of change only there is no guarantee that change will take place in a school because subject-adviser, ...is not always present to ensure programme objectives are being achieved”. When teachers are regarded as initiators of change there is a long-term commitment to improve teaching and learning. Hence, according to Murphy (1987:31) it is

incumbent upon those of us who comprise the education profession, in co-operation with other interested or concerned individuals and groups, to undertake the task of developing new and improved programmes for the preparation of those who serve in schools as teachers, administrators and educational specialists.

INSET should therefore, be mandated in providing help to those in education to adjust to the prevailing conditions and to the changes emanating through the explosion of knowledge, technology and development to remain relevant in a changing society. The chief concern and one of the main objectives of INSET must be to devise

strategies for adjusting the curriculum to cope with the constant needs and changes in society.

The general aim of INSET, in any situation, is to improve the quality of the teaching and to instill the habit of continuous life-long education. The reference to continuing education dispels a widely held misconception in the teaching profession that training ends with a qualification in teaching. Hartshorne (cited in Murphy, 1987:35) draws attention to the fact that a qualification in education is only a certificate to a profession “that requires in-service education and training throughout the teachers whole career”.

All of these aims and activities can contribute to devising appropriate capacity building strategies to promote life-long education. In developing a positive attitude to life-long learning, the department of education should create the necessary conditions, infrastructure and support for teachers. In the absence of a positive attitude to life-long education Pather (1995:46) argues that “teachers may respond to INSET sporadically or whenever they feel they have the time”.

2.4.6 MANAGEMENT OF CHANGE

The changing educational environment, the divers educational needs of pupils, etc strongly demand educational change, not only at the educational system level, but also at the school-based level. The school has to change and develop continuously to satisfy the rapidly growing needs of education. Change at school may be externally imposed or internally generated. According to Crandall, Eiseman and Louis (in Cheng, 1996) there are two categories of school-based change that educators need to be empowered for: the pedagogic focus change and the organizational focus change. The former focuses on instructional process, teaching methods, etc whilst the latter on school organizational structures and processes such as management style, hierarchy of authority, etc. In South Africa, for example, external change was brought about where there has been a major curriculum change at the system level together with the introduction of Economic and Management Sciences as a new learning area. This change has ushered in internally generated school-based curriculum development requirements. Cheng (1996:147) argues that “curriculum change as a form of planned changes in the school may meet resistance, and its implementation may be affected by

different organizational factors”. Though there may be curriculum evaluation studies, Cheng’s (1996:147) concern is that

Very few provide guidelines or models for practitioners or researchers to effectively implement and manage curriculum change in the complex context of school organization in which there are multi-level influencing factors.

With EMS being a totally new learning area and without a theoretical model linking organizational factors and curriculum innovation and change, it is very difficult to understand the dynamic and effectiveness of curriculum change.

In order to maximize teaching and learning effectiveness, Cheng (1996:147) suggests three possible approaches. The first is a simplistic curriculum change approach where curriculum is developed or changed at the individual, programme or school level to “fit with teacher competence” (Cheng, 1996:148). The second, called the “Teacher Competence Development Approach” (Cheng, 1996:148) whereby teacher competence is developed to meet the demand of the curriculum. This approach assumes that external experts impose curriculum change and teacher competence can be developed easily to satisfy all the needs of the changed curriculum. Considering that EMS is a new learning area, and that South Africa has experienced a radical curriculum reform, neither the first nor the second approach can achieve any degree of success independently. Therefore it is suggested that the dynamic curriculum change approach be used where both the curriculum and the teacher competence be developed and changed. This approach acknowledges that both curriculum and teacher competence are dynamic, continuous and cyclic. It further advocates that

Teacher competence should be developed not only to satisfy the demands of the existing curriculum or the changed curriculum but also to develop the curriculum more appropriately to fit the students’ characteristics, school goals and pre-existing school conditions (Cheng, 1996:149).

A significant point about this approach is that it recognizes that if effective curriculum change is to be achieved, then not only administrators or external experts should be involved in curriculum change, but teachers must also be involved in curriculum planning and decision-making. Cheng (1996) therefore shares the view with Fullan (1992:67) that “professional development must become more curriculum and job embedded”.

This approach is most appropriate in view of EMS being a new learning area with educators not necessarily having the relevant capacity to develop, innovate and manage the EMS curriculum. Professional development strategies must therefore acknowledge that EMS is a new addition to the curriculum and should therefore assist teachers with this new change that has been imposed onto them.

2.5 PROFESSIONAL DEVELOPMENT APPROACHES

Professional Development activities can come in a variety of types – event-specific workshops, meetings, conferences, ongoing consultants, support group meetings, user manuals and from a variety of sources, i.e. external consultants, board consultants, knowledgeable administrators and fellow teachers. “Regardless of their identity the providers must be credible to teachers implementing the change and the activities should focus on assisting with implementation of specific innovations” (Fullan, 1992:43).

Different, but apposite approaches with varying foci must be used to facilitate appropriate participant interaction with relevant support materials. A critical component of staff development is to institutionalize provisions for ongoing socialization and training. Therefore, when considering approaches for professional development, recent Human Resource Management theories seek to start from a consideration of “what the strategies of an organization might be and then asks how the human resources can help formulate and accomplish those strategies, and what human development and motivation is required to meet those ends”. (Bush, 1994:200). This approach is embedded in the requirements as stated in the Education Labour Relations Council’s Collective Agreement no. 3 of 2002 (ELRC) whereby staff members and “his or her immediate supervisor develop a Work Plan ... linked to organizational requirements ...”.

The chosen approach(es), as enumerated below, not only reflects the interpretation and importance placed on professional development but will also reflect how well professional development is integrated with other areas of management. “Analysis of preferred current approaches therefore allows and encourages an organization to promote a balance of interests in terms of professional development activity” (Bush, 1994:300).

2.5.1 ORGANIC APPROACH

This approach to professional development views change as evolutionary. In these approaches development occurs naturally as a normal consequence of experience and social interaction which, Murphy (1987) referred to as “on site coaching”. This also implies that the school is used as a continuous training ground. Joyce (in Pather, 1995:44) therefore recommended that “if education is to flourish and if schools are to be a vital force in society, it is necessary to rebuild the school into a life-long learning laboratory not only for the children but also for the teachers”. Dissemination is via informal discussions, staff room discussion and sharing of experiences through such practices as ‘shadowing’ in which younger teachers observe experienced teachers at work. The only purpose of planning here is to

design studies that provide descriptions of practice which can serve as vicarious experiences for practitioners, which in turn will stimulate reflection, insights, natural generalizations and personal change in practice” (Fullan in Bush & West-Burnham, 1994:301).

Such approaches assume a great degree of professionalism of educators that are self-directed and motivated to improve.

Training at this level is usually highly contextualised and very institutionally focused. It caters for a high degree of congruence between organizational and individual needs. However, this approach also has its attendant challenges that are enumerated under the heading Challenges: Centralized and Decentralized Improvement.

2.5.2 AD-HOC APPROACHES

Ad-hoc or laissez-fair approaches are “characterized as lacking in planning or integration” (Bush, 1994:301). The strategy adopted thus far by both national and provincial education training teams reflected this narrow stimulus-response approach. According to Bush (1994) professional development in these approaches is reactive and opportunistic and lacks any systematic attempt to coalesce organizational and individual needs within a managed programme. Joyce (in Pather, 1995:44) therefore criticizes Ad Hoc INSET programmes and recommends teachers to “continuously improve their repertoire of teaching skills”. However, this approach, usually through the cascading method, holds its rightful place because of its unique purpose it serves.

It is usually used at times when major reforms in education requires urgent dissemination of information across the entire spectrum of the education sector – such as the current curriculum reform being experienced in South Africa. The major drawback of this system, however, is the ‘dilution of impact’ i.e. interpretation of issues becomes muddled and this invariably causes confusion. It must be stressed that this approach should not be used as a stand-alone method but with appropriate interventions at different levels, the desired outcomes could be achieved.

2.5.3 PROCESS-BASED APPROACHES

These approaches include those models of professional development that emphasizes reflection, analysis and self-generated review. Typically these approaches are considered developmental processes in their own right. “They aim to enhance practice through a cycle of learning leading to the testing of potential solutions to problems in practice” (Bush, 1994:301).

Tanner and Tanner (1980:646) referred to this approach as “action research” whilst Shaeffer in Rust & Dalin (1990:96) referred to it as “Participatory Teacher Training”, which Burrello and Orbaugh (cited in Pather, 1995:68) referred to it as “Collaborative approaches” and Lyons in Coutts (1995:117) called it “on-the-job self-improvement” that are driven by priorities identified by learners themselves. The educators’ daily classroom interaction is recognized in the training itself. In order to facilitate this kind of a participatory, self-directed training programme, an appropriate and enabling organizational environment is required through collegial means.

However, this approach makes many assumptions that are essential to its success. Some of these, whilst not exhaustive, are professionalism of educators, collegiality and appropriate capacity of educators.

In view of ‘Participatory teacher training’ being the new foci in terms of teacher development strategies, a brief account of this strategy is warranted.

William Goode (cited in Tanner and Tanner, 1980:628) points out that implicit in the definition of a professional is the “responsibility for the development of professional knowledge – this means that if educators are to be professional, they must have a role in generating knowledge about the curriculum”. Thus, Shaeffer in Rust & Dalin (1990:96) proposes “Participatory Teacher Training” as a new approach to

professional development. Burrello's and Orbaugh's research quoted in Pather (1995) has proved that collaborative approaches to INSET programmes are the most effective. Other writers such as Agrie and Ducharme, Joyce, Binko and Newbert, Weil and Clinton (cited in Pather, 1995), stress the need for all participants in INSET to work together at all stages. Whilst participatory teacher training has not been clearly defined, its characteristics, shared with other traditional approaches are:

Educator plays an active role in the training process and is therefore not a passive recipient of knowledge – teacher becomes a participant in decisions regarding the needs to which training must respond, what problems must be resolved and what skills and knowledge must be transmitted. The teacher becomes an agent rather than the object of change as envisioned in the concept paper – (DoE, 2004) “Teachers are regarded as change agents and are key to the transformation of education”. The assumption being that “the most effective learning occurs when the learner is treated as a constructor of his/her own knowledge” (Rust, 1990:97).

Because of participation – training becomes self-directed and the teacher self-taught. “The autonomous nature of the teacher in the classroom is recognized in the training itself as he or she is encouraged to assess problems and design and experiment with appropriate solutions” (Rust, 1990:97) in other words – the classroom becomes the training ground.

2.5.4 CONSULTANCY APPROACH

In this approach professional development is done through the use of outside agencies, such as non-governmental organisations, business consultants, etc., to analyse the education system holistically within schools/districts or provinces.

The significant advantage of the use of consultancy as a form of development is that, other than providing additional capacity to the often under-resourced Department of Education, it provides alternative perspectives on management practices and provides unencumbered support. Invariably consultants, collaborating with industry, tend to bring in business principles and align these with educational perspectives to the advantage of educational improvement. However, in South Africa, for the purposes of ensuring quality in in-service training through consultants, the following legislative requirements must be met:

- ❑ Consulting agents must be registered/accredited with their relevant Sector Education and Training Authority (SETA).

- ❑ Consultancies must also register or be accredited with the Education, Training and Development Practitioner SETA.
- ❑ Programmes must be registered on the National Qualifications Frameworks (NQF) on a unit standard and should be accredited by the South African Qualifications Authority. Participants undertaking these training should therefore receive certification.

2.5.5 OBJECTIVE APPROACHES

Typically these are manifestations of super ordinate models of control as described by Day in Bush and West-Burnham (1994:290). These approaches place priority of organizational needs over, and at times at the expense of, individual career or professional needs. Here, according to Murphy (1987) and Bush (1994:302) staff development programmes are “designed to gain from staff an attitudinal commitment to the philosophy, values and goals of an organisation”. Development in these approaches are therefore ‘deficit-driven’ whereby needs of the system are identified and competencies are developed in individuals to meet these specific needs.

At a more sophisticated level, an objectives approach to professional development would advocate integrated strategies for recruitment and retention ... and meet the needs of the organization over a period of time (Bush, 1994:303).

2.5.6 SUPPORT

Although support is not an approach, it deserves separate mention on account of it often being neglected by most, if not all, approaches. Support services should be seen “to include all agencies and services that provide opportunity to education staff, enabling training and experience to be effectively utilized; professional attitudes to be encouraged; and staff development to be facilitated” (Rust, 1990:143). Support should therefore be seen as an integrating function that should ensure professional development activities coalesce with lasting teacher changes in application to benefit both learner and organisation. Thus a proper framework of support should indicate, “that effective professional development is not a peripheral bolt-on, ... rather, an integral feature of day-to-day work” (Bush, 1994:298). Some of the purposes of support as defined by Bush (1994:298) are:

- To ensure appropriate needs analysis

- To ensure appropriate match between need and learning activity
- To resource agreed activities
- To facilitate performance enhancement as a result of learning
- To monitor the effectiveness of the learning experience
- To evaluate the effectiveness of the development activity.

2.6 SOME CHALLENGES OF PROFESSIONAL DEVELOPMENT

Given that teaching is a complex, dynamic and tension-filled profession, teacher development faces multidimensional challenges both in pre-service and in-service programmes. The task of teacher development is not made easier when one considers and acknowledges a history of neglect and dysfunction as a legacy of the apartheid era in South Africa. Redress through curriculum reform has been the driving force for the growth of interest in in-service education, especially in South Africa. This has posed many challenges and according to Adler (2002:3) teacher development programmes must manage tensions inherent in:

“The nature of the knowledge selected by the programme; how to balance educational activity between subject and pedagogic knowledge, and between theoretical and practical knowledge.

The location and duration of the programme – where teacher learning is best conducted, and for what length”.

Whilst many challenges face teacher development, the following, not necessarily exhaustive, shall be discussed.

2.6.1 FOLLOW THROUGH

Whilst in-service programmes may be prepared after necessary consultation and reflect the perceived needs of educators, the question is how to ensure that the INSET training is implemented in practice. Authors such as Vivian (in Rust & Dalin, 1990:66) deplore this programme deficiency of not ensuring acquired learning being integrated into actual teaching. INSET courses thus far have been removed from the day-to-day realities of the coalface of teaching – thus leading to it being artificial. With the further deficiency of not ensuring that simulated cases are adapted and implemented, a further divide between training courses and school improvement is created.

It could therefore be argued that if any lasting benefit is to be experienced through INSET, then an urgent and effective follow-through of courses must be implemented.

Currently, whilst many INSET programmes may be conducted, there seems to be little or no monitoring and support at school level of the implementation process.

This deficiency causes non-implementation, partial implementation or confusion resulting in incorrect implementation of programmes. It is thus hoped that through this study relevant 'follow-through' models can be developed to see the process of INSET through to fruition.

2.6.2 INTEGRATION OF AUTHORITY AND SUPPORT

The impact of professional relationships of educators with administrators and supervisors has, in no small measure, been responsible for impeding professional development strategies. To begin with, "supervision tends to be error orientated" (Tanner and Tanner, 1980:630). Professional development has been inhibited whereby supervisors, despite problems being identified by educators, "continue to start and end by pointing out educators' errors" (Tanner and Tanner, 1980:630). Therefore, "there was a tendency to keep authority and support separate on the grounds that the evaluative role of authority is incompatible with providing developmental support" (Fullan, 1992:77). Recent studies indicate that these two are in fact not only compatible, but also essential that they are both integrated as envisioned in the Policy Framework for Continuous Professional Development and Support (KZN DoE – July 2003). In particular, "putting the responsibility for implementation planning explicitly and squarely on the shoulders of those in line position ... makes it necessary for support and authority to be combined in a way that greatly strengthens the likelihood that sustained attention will be paid to implementation and follow through" (Fullan, 1992:77). Accordingly, the teacher development strategy (NCS concept paper June 2004) argues for "the role of the school principal and SMT's in both the orientation and the targeted training phases is central to the implementation".

However, inherent in this is the assumption that those assuming positional authority possess/enjoy expert authority (fundamental knowledge) in a specific Learning Area,

especially in Economic and Management Sciences, to provide relevant support. A true professional should therefore be involved in building the knowledge base for his or her field. Supervision must therefore “help the educator to build this knowledge base” (Tanner and Tanner, 1980:630). In so doing, supervision must become concern-focused or problem-focused. However, should there be no such expert authority enjoyed in the school, then some structural re-organization should be considered. At a minimum, “it means making explicit the implementation-planning role expectations of districts & moving resources from districts to school level to support implementation” (Tanner and Tanner, 1980:630). There should also be an examination as to what extent the present structures facilitate or inhibit the co-ordination and integration of curriculum development, professional development and curriculum support, curriculum implementation and evaluation.

2.6.3 THEORY-PRACTICE TENSION

One of the tensions of educator development programmes is what Adler (2002:5) calls the “theory-practice tension”. This tension revolves around how to combine learning about teaching through a distancing process called “theory” with learning through immersion in experience referred to as “practice”. In other words should teacher development programmes focus on principles of teaching and learning or on direct experience in classrooms. This tension applies both to the subject-focused components and the pedagogy-focused components of teacher education. The problem is that no teacher development programmes can provide experience of all the complexities teachers are likely to face. As a result, some argue that programmes need to provide opportunities for teachers to understand the underlying principles of teaching in general and of specific subject. These can then be applied and adapted to particular and diverse circumstances, and to new challenges as these arise – much like the “one-size-fits-all” methodology used thus far by the Department of Education in South Africa. Others argue that this kind of knowledge, divorced as it is from real classrooms, is not easily applied or adapted. Teacher education is likely to be more effective if it is focused on examples of practice and more direct experience in the classroom and alongside experienced teachers – i.e. customization of programmes, driven by needs of educators. Many teachers regarding the Revised National Curriculum Statement (RNCS) role-out programmes held by the Department of Education in KwaZulu-Natal schools are currently experiencing this tension. The theoretical imperatives of the RNCS programmes often take precedence over the

contextual realities of classroom practice. Teachers are often ill capacitated to operate at the Creative-Generative level and therefore need more capacity building. Davies and Zaret (cited in Pather, 1995) recommended that pre-service period of training be followed by sustained INSET phases for the application of teaching skills and bridging theory with practice. Tanner and Tanner (1980:646) called this “action research” whereby teachers could and should improve the curriculum through investigations into their classroom problems.

This tension intersects profoundly with tensions over the location of teacher education and tensions over the duration of programmes, particularly with regard to INSET programmes.

2.6.4 THE TENSIONS AROUND PLACE AND TIME

Do teachers learn more about how to teach through courses based in Educational institutions like universities or do they learn more from actually teaching themselves, and from observing experienced teachers and working alongside them as do apprentices and trainee doctors? (Adler, 2002:6).

The advantage of programmes at institutions is that the distance from the site of practice provides a vantage point from which to look at practice, think about it and critique it while not having to worry about how the actual practice is being carried out. This distancing provides possibilities for developing conceptual tools to think about and work on practice, a distancing that it is hard to establish when one is immersed in the day-to-day ongoing challenges of schools. Alternatively, learning to teach in schools brings teachers up against the realities of classrooms and the kinds of issues they will face as fully-fledged teachers. “The arguments for school-based programmes are particularly powerful in contexts of curriculum reform” (Adler, 2002: 6). Reforming a curriculum means developing new approaches to knowledge, learning and teaching, and constructing new kinds of classroom practices. Teachers need to be able to see directly what this practice looks like, or at least be able to imagine what it looks like. This requires school-based initiatives. Thus tensions related to activity and location is intertwined with tensions over time. Institutional based programmes are time constrained in terms of field experience and lack necessary financial and human resources to provide adequate support to educators in their working environment. However, in other training programmes, time tensions extend beyond allocation of time within the programme to the duration of the programme itself. There is often a sense of urgency in implementing reform, and a

tendency to organize short periods of INSET in support of the reform. Tanner and Tanner (1980) and Adler (2002) agree that longer in-service training is viewed as more useful than in-service activities of a day or a few hours. Adler (2002:6) further lays claims that

Short-term programmes do not easily translate into changed or better classroom practice ... school-based programmes appear to be far more effective at the level of classroom practice, though again there are resource and cost implications.

Thus, according to Adler (2002:6) the challenge of any programme design is how it is to be managed in terms of What is included and excluded, what is integrated and what is kept apart, how much time is given to activities within the programme and to the programme as a whole, where these activities take place, that ultimately shape learning possibilities for teachers.

Thus, it is the management of these constraints that determines what it is teachers can and do learn from such programmes. The Department of Education must therefore assess the cost-benefit ratio of holding short courses and hoping for a radical change as opposed to preparing more long-term programmes. Programmes must be needs driven and organized at venues outside of the school situation. This provides an enabling environment, whereby teachers can supplement their experiences with appropriately critiqued, interrogated and accepted innovations of a theoretical nature for sustained change.

2.6.5 CENTRALIZED OR DECENTRALIZED IMPROVEMENT

Which INSET programmes would be more effective; centralized – organized by department officials for teachers on a top-down basis or decentralized – organized for the teachers by the teachers at district/cluster/school level? Discouragingly, “neither centralized nor decentralized approaches work” (Fullan, 1992:117). The decision of whether INSET should be centralized or decentralized, according to Day in Bush (1994:290) depends on who dominates the management of professional development programmes. Is it the super ordinate or the subordinate group? The relative control of one group over the other determines the level at which professional development activities will be undertaken. “In essence, the locus and direction of control may be said to be bottom-up or top-down” (Bush, 1994:290).

Centralized INSET, because of its fixation to standardize curriculum and performance, is inappropriate and ineffective, except in its narrowest sense. Fullan (1992:114) argues that this leads to “intensification” which he defined as:

Increased definition of curriculum, mandated textbooks, ... specification of teaching and administrative methods backed by evaluation, and monitoring all serve to intensify as exactly as possible the what and how of teaching.

Although ‘restructuring’ occurs best at decentralized INSET programmes – such as school-based or site-based, it is problematic; either because of lack of expertise by educators in development strategies or workshop ethics or because assessment of attempted changes cannot be tracked. Restructuring as defined by Fullan (1992:114):

Enhanced roles for teacher in instruction and decision-making, integration of multiple innovations, ... radical reorganization of teacher education, new roles such as mentors, coaches, and other teacher leader arrangements.

According to Fullan (1992) some of the inherent obstacles to school-based inset programmes are inadequate time, training and technical assistance; unresolved issues involving administrative leadership on the one hand and enhanced power among other participants on the other; constraints on teacher participation in decision-making; reluctance of administration at all levels to give up traditional prerogatives and restrictions imposed on schools by unions, districts, provincial and national departments of education.

School-based approaches pose the danger of “substitution of site-based approaches for central responsibilities involving initiation and support of comprehensive school reform efforts” (Levine and Eubanks cited in Fullan, 1992:119). Furthermore, teacher development approaches at school level may be so contextualised that it may lack portability. We must therefore, “not be lead naively to see the school as isolated from its sociopolitical context, able to engage in miraculous self-renewing activities without district, community” (Fullan, 1992:119) and provincial and national support. The tension between centralized and decentralized responsibilities must also consider that the school will never become the centre of change if left to its own devices. Schools cannot redesign themselves. Schools can, through ignorance of new developments and/or through paucity of theoretical reflection, perpetuate obsolescence by encouraging a fallacy of being innovative. The role of all stakeholders is therefore crucial to establish the conditions for continuous and long-term development and for school to stay truly innovative.

2.7 EMERGING ISSUES

Overall, there is very little by way of books dedicated exclusively to the subject of the professional development of EMS teachers in primary school. It was therefore found necessary to provide a broad framework definition of what professional development is, to identify different perspectives on professional development and the growth in the field of professional development especially in EMS. A thorough discussion of the aims of INSET was investigated followed by the different approaches to professional development. Finally, a closer examination of some of the challenges facing professional development was undertaken.

It was established that the challenge of today's education context needs education professionals who are lifelong learners. These should be teachers who are proactive in their search for professional development, knowledge and opportunities; voluntarily seeking to improve their own teaching practice throughout their careers; that support colleagues and contribute to a climate of professional development. However, we cannot assume that education professionals develop spontaneously and independently. Education professionals need to be nurtured, developed and supported as individuals and as institutional and professional groups, through strategically structured and planned programmes that are appropriately resourced. Accordingly, although there exists many approaches and strategies to professional development, no one particular method can claim any degree of success for the holistic development of educators. Different methods and approaches serve different purposes. Aims of INSET differ according to needs and time. Therefore, within any educational organization or particular institution it is probable that more than one approach will be used. The range will depend on the size, structure and culture of the organization and will be influenced by the perception and preferences of individual professional staff.

Whilst development needs of individuals and organization change constantly, so too must development strategies to meet these needs. However, whatever the reason or method of development, one crucial feature of any development model must identify with the concept that development is a process that needs monitoring and support built into it. Furthermore, attempts must be made of all development strategies to seek congruence of organizational needs, individual needs, theory and practice and training and support.

CHAPTER THREE

RESEARCH METHODOLOGY

3.1 INTRODUCTION

The purpose of this study was to investigate the capacity building strategies of Heads of Department, Curriculum co-ordinators and Level 1 educators in the Economic and Management Sciences (EMS) Learning Area in 5 primary schools in the EtheKwini Region of KwaZulu-Natal Department of Education. The study also looked at the attendant challenges facing capacity building among EMS educators.

This chapter describes the research methodology. First the research design is described. Sampling techniques, data collection methods, data analysis procedures and the limitations follows.

3.2 RESEARCH DESIGN

The study used the qualitative design in order to gain an in-depth understanding of the situation and current professional development strategies of EMS educators. Qualitative research involves the collection of data through asking, watching and reviewing to capture detailed description of situations, events, people interaction and observed behaviours. It provides “explanation and understanding of what is unique and particular to the individual rather than of what is general and universal” (Cohen, Manion and Morrison, 2001:7).

Within the qualitative paradigm, this investigation undertook a case study. A case study was considered for this research because Cohen et al (2001:181) asserts that “contexts are unique and dynamic hence case studies investigate and report the complex dynamic and unfolding interactions of events, human relationships and other factors as a unique instance”. According to Hitchcock and Hughes (in Cohen, Manion and Morrison, 2001:182) case studies

- (a) are set in temporal, geographical, organisational, institutional and other contexts that enable boundaries to be drawn around the case;
- (b) can be defined with reference to characteristics defined by individuals and groups involved; and
- (c) can be defined by participants’ roles and functions in the case.

Furthermore a case study provides “a unique example of real people in real situations, which enables readers to have clear understanding of ideas” (Cohen et al, 2001:181).

This is important as case studies provide fine grain details that provide powerful human-scale data from which decisions regarding development strategies can be made where theory can be infused with practice. It also provides an opportunity to analyse intensively the multifarious phenomena that affects EMS educators' capacity to teach EMS.

This approach was appropriate for the study because, whilst I exercised little or no control over events, it afforded me an opportunity to investigate the rich and vivid descriptions of events affecting the curriculum co-ordinators' ability to manage the EMS curriculum. It was an investigation of "an instance in action" (Adelman et al in Cohen, Manion & Morrison, 2001:181).

With due cognisance of costs, time and administrative support required for the successful completion of this study, the non-probability convenience sampling strategy was used in selecting a sample of 5 primary schools in the Phoenix district. The sample chosen was based on the writer's access to the chosen schools. In order to keep travelling costs and time factor at a minimum, schools chosen were within close proximity to each other. Prior working relationship with these schools and an understanding of the respondents also created a collegial atmosphere between respondents and me.

3.3 THE RESPONDENTS

In this study there were three categories of respondents. The first category of respondents for interviews was 6 Heads of Department to whose leadership the EMS learning area devolved. The second category of respondents was the level 1 educator who was asked to complete a questionnaire. The 18 level 1 educators comprised of one educator per grade teaching EMS in the intermediate and senior phases in primary schools. The third category of approximately 180 respondents provided observational data collected over a period of two years. These respondents participated in EMS workshops conducted by myself at Ikhwezi Community College of Education.

3.4 DATA COLLECTION METHODS

This study adopted a methodological triangulation of data collection instruments including interviews, observations and a questionnaire. Cohen et al (2001:113)

defines a methodological triangulation as “using the same method on different occasions or different methods on the same object of study”. The rationale for triangulation was informed by Cohen et al (2001) and Erlandson and Neuman in De Vos, Strydom, Fouché & Delport (2002:341) where

the researcher seeks out several different types of sources that can provide insights about the same events or relationships ... and By observing something from different angles or viewpoints, they get a fix on its true location.

Accordingly, through the use of multiple measures of the same phenomenon, the capacity to collect as much relevant information as possible was substantially enhanced since weaknesses of one instrument were overcome by the strengths of the other. It therefore brought diverse theories to bear on a common problem by revealing all aspects of the phenomena researched. “Finally, triangulation may also serve as the critical test, by virtue of its comprehensiveness, for competing theories.” (De Vos et al, 2002:342).

3.4.1 QUESTIONNAIRE

This study used one questionnaire that was administered to the longest teaching EMS educator per grade, from grades 4 to grade 7, in the Intermediate and Senior phases in primary schools. This yielded a total of 18 respondents from 5 schools.

Questionnaire comprised mostly of yes/no, rank ordering and Likert rating scale closed questions. This was done because they compel respondents to make a choice and was useful as a funnelling device for subsequent questions. These types of questions also “do not discriminate unduly on the basis of how articulate the respondents are” (Cohen et al, 2001:248). However, closed questions have limited scope in capturing the rich descriptive experiences of educators. This was therefore counterbalanced with some open-ended questions to enable respondents to write free response in their own words. However, the actual number of open-ended questions was limited since Maharaj (1991:44) claims, “such questions invariably elicit a great deal of repetition and irrelevant materials which takes a long time to sift through”. In order to prevent respondents from becoming disconcerted by shifting from one topic to the next and back, questions were grouped into different categories and logically sequenced. Section A asked for biographical data of respondents. Section B dealt with information regarding the respondents’ content knowledge of economic and management sciences. Section C elicited data on professional development strategies and Section D dealt with the challenges of INSET programmes

The questionnaire was an appropriate method as it was considered least time consuming because it enjoys the capacity to be administered without the researcher. Questionnaires are also the least threatening to participants.

Acknowledging that people attach different meanings to words in different contexts, questionnaires were pilot tested among 8 educators at workshops conducted at Ikhwezi Community College of Education. This was done to check for clarity of the questionnaire items, instructions, layout, and time frames for completion, to eliminate ambiguities or difficulty of words, to identify commonly misunderstood or non-completed items.

The questionnaires, in individual A4 envelopes, were hand delivered to the heads of department (HODs) of each school in the sample. With the permission of the principal, the HODs were requested to hand these questionnaires to the longest teaching EMS educator in each of grades 4, 5, 6, and 7. It was established that in 3 schools there was only one educator per grade teaching EMS whilst the other two schools had three educators teaching EMS across four grades. This therefore brought the total number of respondents to 18. The questionnaire was accompanied by a covering letter, attached as appendix A, which set out the purpose of the research, the assurance of confidentiality, and time frames for collection. Respondents were notified, in writing, that the completed questionnaires were to be put into A4 envelopes, sealed and deposited into a specially provided box placed in the staff room to be collected on a stipulated date. Principals were advised that they were not expected to assist by way of collecting completed questionnaires. The reason for doing this was to ensure that respondents would not be inhibited by the fact that principals would have access to the type of data provided by individual teachers of the staff of schools.

Initially, only 12 completed questionnaires, out of a possible 18, were collected. As this represented 67 % of the respondents in the sample, a personal visit was made to enquire whether educators required additional time for the completion of the questionnaire. It should be noted that the visit was in no way intended to put pressure on the respondents nor to influence their responses. In fact, an appeal was made to the HODs not to intimidate teachers who had not responded. This follow-up method

yielded a further 6 completed questionnaires bringing the total number of respondents to 18. This figure represented a response rate of 100 %.

It is accepted that, although the sample size was small, a response rate 100% was sufficient to enable the writer to draw tentative conclusions about the topic being researched and to make proposals accordingly.

3.4.2 INTERVIEW

This study used face-to-face semi-structured interviews with senior/intermediate phase heads of department of the EMS learning area. Interviews enabled the capture of the rich diversity of experiences of HODs, discussing “their interpretations of the world in which they live, and to express how they regard situations from their own point of view (Cohen et al 2001:267). The focus of interviews was to investigate whether level 1 educators’ perspectives of their own subject-specific knowledge of EMS correlates with HODs perceptions and the demands of the curriculum. Thus, it attempted to either corroborate or refute level 1 educators’ responses in the questionnaires. It was also to solicit information on how heads’ of department fundamental EMS knowledge impacted on their ability to manage the EMS curriculum and provide professional support to their educators. Through interviews, it was also intended to seek HODs’ development challenges and what strategies were employed to facilitate efficient implementation and management of the EMS curriculum. Interviews, therefore served as an additional means of gathering information by providing access to what is “inside a person’s head” (Cohen et al, 2001:268) to make it possible to measure what a person knows. Interviews were used as it allowed for clarification and common understanding of meanings that provided an opportunity to capture the deeper interpretations of issues by curriculum co-ordinators.

As interviews are generally time consuming, interviews with all five HODs were conducted after hours. With the permission of the HODs concerned, all interviews were tape-recorded. Furthermore, as suggested in De Vos et al (2002) and with the express permission of the interviewees, the writer made notes, when necessary, whilst the interview was in progress. The HODs were most co-operative in assisting me with the processes of data collection.

3.4.3 OBSERVATION

As a member of the teacher development directorate mandated with the professional development of educators, I was able to observe EMS educators as participants at workshops conducted at Ikhwezi as well as in their natural working environment at schools. Observation also includes conversational interactions with educators and other education stakeholders at conferences, seminars and gala functions. Observation as a strategy presented “opportunity to gather ‘live’ data from ‘live’ situations”. Observations further enabled the researcher

to understand the context of programmes, ... to see things that might otherwise be unconsciously missed, to discover things that participants might not freely talk about ... to move beyond perception-based data (Cohen et al, 2001:305).

The role of the researcher in the professional development workshop was that of a facilitator, a participant and an observer. The focus of the observation was to determine the level of content knowledge of educators in EMS and the level of integration of generic knowledge with content knowledge. Educators were also observed for their level of preparedness for transformation from teacher to facilitators of the EMS curriculum. The period of observation was over a period of 2 years and workshops were conducted over a 2-day period.

3.5 DATA ANALYSIS PROCEDURES

Through a process of analytic induction, qualitative data from interviews, observations and responses to open-ended questions in the questionnaires were analysed. In the analysis of qualitative data I sought patterns of responses and determined causal connections of responses to provide solid descriptive findings of EMS educators’ fundamental knowledge and their capacity building strategies.

All interviews were transcribed and each transcript was subjected to a system of coding to sort data and to uncover underlying meanings in the text to bring both the “central and peripheral referents to the researcher’s attention” (De Vos, Strydom, Fouché, Poggenpoel & Schurink, 1998:341).

Data were classified into categories that corresponded with those in the questionnaire. Category A was on professional development requirements of educators whereas category B reviewed the HOD’s strategies for the provision of subject knowledge and

support to educators. Capacity development needs of heads' of department in providing relevant support to educators was classified as category C whilst category D addressed the challenges experienced by heads of department in managing the EMS curriculum. Lastly category E identified the strategies HODs used in addressing challenges identified in category D.

Observational data and field notes were also subjected to a system of coding, sorting and classification into categories as identified for interview transcriptions.

Quantitative data from the questionnaires were analysed using the SPSS programme. Through the use of Excel programme various types of graphs were generated.

Data from various sources were triangulated to help the researcher to maintain credibility, accuracy, representation and authority of the research.

3.6 LIMITATIONS OF THE STUDY

Although the research has been informed by universal norms and standards regarding capacity building strategies, the findings are not easily generalisable to the general South African teaching corps. Accordingly, whilst generalization of such findings and recommendations will be restricted to this cluster, such information may be applicable to other similar clusters with similar demographics within the district or region.

This is as a result of this research having been conducted within a small sample in the KwaZulu-Natal province, which is not sufficiently representative of the education system of South Africa.

3.7 SUMMARY

This chapter has set the framework for this research project. It also outlined and provided relevant motivation for the research design, sampling design and data collection methods chosen. The processes of piloting, administering of questionnaires and conducting of interviews were discussed. The chapter also highlights the some of the limitations of this research project. Finally, in light of maintaining credibility, consistency, accuracy and validity of the findings of this research, this chapter provided an in-depth review of different data analysis strategies.

CHAPTER FOUR

DATA PRESENTATION AND DISCUSSION

4.1 INTRODUCTION

The purpose of this study was to investigate the capacity building strategies of Heads of Department, Curriculum co-ordinators and Level 1 educators in the Economic and Management Sciences (EMS) Learning Area in 5 schools in the Ethekwini Region of KwaZulu-Natal Department of Education. This chapter presents and discusses the findings. Data, both the quantitative and qualitative means, as discussed in chapter three, were collected. Thus, through methodological triangulation of data from questionnaires, observations and interviews, data were analysed and findings are presented and discussed in this chapter.

For purposes of ease of understanding and presentation, research findings are presented under four categories. Section A presents and discusses biographical data from questionnaires. This section merely identifies background information of educators that has a material bearing on educators' competence and capacity to facilitate the EMS curriculum. Thereafter, data collected through questionnaires, interviews and observations, were methodologically triangulated and are presented in sections B through to section D. Section B discusses the level of EMS content knowledge of heads of department, curriculum co-ordinators and level 1 educators, whilst Section C identifies and discusses professional development strategies for EMS educators. Section D discusses the challenges of in-service education and training (INSET) programmes and some of the strategies heads of department have put into place in addressing some of these challenges.

4.2 SECTION A - BIOGRAPHICAL DATA

Figure 1 Teaching experience of EMS educators

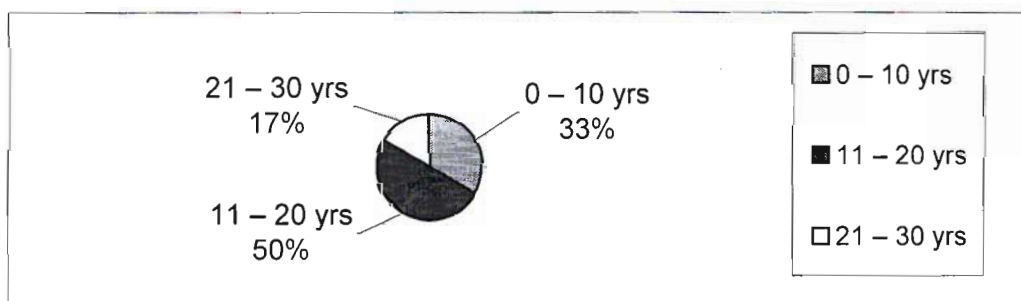


Figure 1 shows that out of a total of 18 respondents 9 (50 %) had between 10 to 20 years of teaching experience whilst a further 3 (17 %) had more than 20 years of teaching experience. This data shows that most of the respondents were quite experienced educators.

Figure 2 Years teaching experience at current school

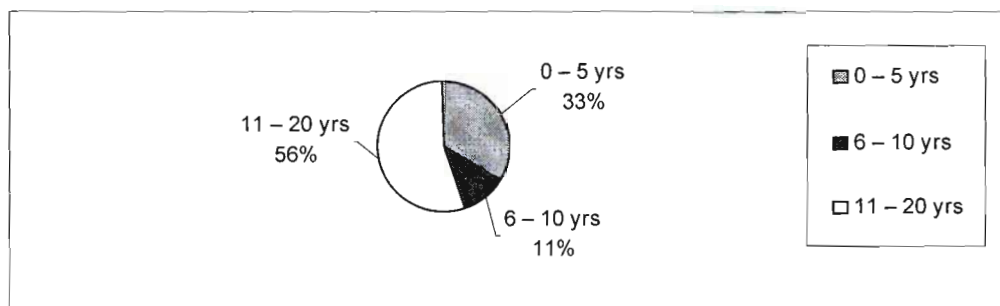


Fig. 2 reveals that 10 (56 %) of the educators taught for more than 10 years at their current schools whilst a further 2 (11%) respondents had at least 6 years of teaching experience at the current school. This indicated that the respondents enjoyed a relatively stable working environment where professional development could have been conducted incrementally with the same group of educators.

Figure 3 Teaching qualification

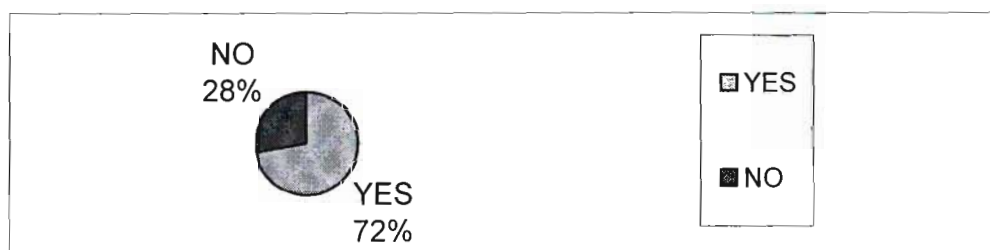


Figure 3 show that 5 (28 %) of the 18 respondents did not have a teaching qualification. This highlights what Murphy (in Pather, 1995:47) has identified as a “serious shortage of adequately qualified teachers” as a basic problem facing the education system in developing countries. Earlier studies by Pather (1995), where it was found that 22 percent of educators were unqualified, indicates that the supply of qualified educators to the system hasn’t improved.

Table 1:
ACADEMIC QUALIFICATIONS:

Qualifica tion	BA	BCOM	B.ED	B.PAED	B.PAED (HONS)	B. SPRTS. SCI.	HDE	UHDE	FDE	RES. CEN. MAN	NO RESP
No.	5	2	4	2	1	1	4	2	2	1	2

Table 1 indicates that whilst many educators had varied specialized academic qualifications, only 2 educators (11 %) had relevant academic qualification in EMS. By Bells' assertion (in Coleman & Anderson, 2002:188), that "teachers should not take in responsibilities ... which is not within their sphere of competence", it could therefore be interpreted that, with the exception of 2 educators with professional and commercial academic qualification, all other educators in the case study should be considered unqualified or under qualified.

This is further validated by educators' claims at workshops where an educator portraying a common view of workshop participants argued that

We may be qualified teachers, but because EMS is a new learning area, we do not have the necessary skills and therefore tend to leave this to the Governing Body appointees who are effectively unqualified".

Reports by HODs further validated claims that commercial qualifications did help educators teach EMS better. One HOD reported that

Whilst many educators have specialized subjects ... others don't have very much background information or qualification with regard to EMS. They therefore find Economics is generally not a very easy subject to teach. It makes it worse without the necessary qualification, marrying the content with the practical aspect proves to be a major challenge. It becomes even more difficult to manage if one doesn't have the relevant qualification.

Data from this section also impacts on the quality and interpretations of responses contained in later sections.

4.3 SECTION B – CONTENT KNOWLEDGE OF EMS

This section attempted to determine the subject-specific knowledge of educators teaching EMS. It further looked at how this knowledge or lack thereof affected educators in the teaching and/or management of EMS curriculum

Figure 4 Do you have subject-specific knowledge in EMS?

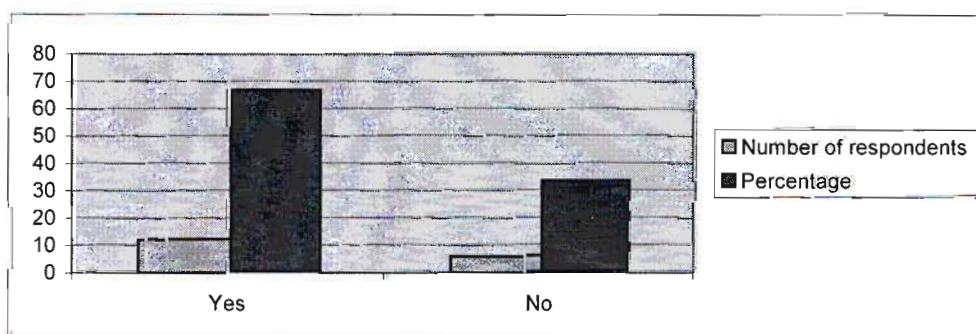


Figure 4 reflects that 12 (67 %) of the respondents reported that they had subject-specific knowledge in EMS. Whilst table 1 indicated that only 2 educators had a commercial qualification, the claims of 12 educators in fig. 4 that they had subject-specific knowledge could be attributable to knowledge gleaned through reading and experience. However, this does not reflect the depth and breadth of their knowledge.

Figure 5 How do you rank your EMS knowledge?

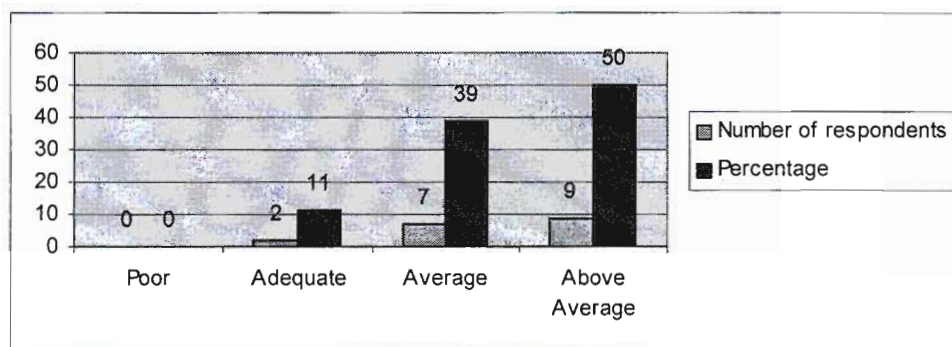


Fig. 5 built on information presented in fig. 4 in that it showed that whilst educators had knowledge in EMS, only 9 educators (50 percent) ranked their knowledge as above average. However, neither their heads of department nor educators at workshops corroborated respondents' claims of above average subject-specific knowledge. Whilst all HODs interviewed shared the view that educators lacked EMS subject knowledge, the following response by one HOD captured the essence of their concern.

Like all educators in the system - a body of knowledge is required before someone needs to disseminate it to someone else. Every educator would like to have this body of knowledge, which would be his or her key in order to help pupils under his or her care. For me as a HOD, I find that this is sadly lacking in especially the field of EMS

This was also corroborated another HOD who had the following to say:

Many of my teachers have no or very little knowledge of the subject matter. Teachers with no knowledge are forced to teach a subject which they have little or which they are not empowered to teach. Due to lack of content and methodology in EMS, I have found that educators are experiencing difficulty in making EMS as practical as possible.

Maharaj (1991:79) reported similar findings where he found disturbing the fact that one third of his respondents were "teaching subjects they were not suitably qualified to teach".

All HODs refuted educators who fallaciously claimed above average knowledge. One HOD, whilst portraying the shared sentiments of all HODs, argued that educators were

Teaching the children according to what's there in terms of theory and because of their lack of EMS knowledge, there is a tendency of lacking innovative ideas in the teaching of EMS.

Another HOD pointed out that

Whatever we get is from textbooks. We rely totally on materials that are handed out to us from books. Teachers stick to textbooks and outside that they don't have knowledge – so they have a problem of expanding.

This is probably what Hoyle in Harris, Lawn & Prescott (1982:282) meant by the “restricted professional ... who is mainly interested in classroom teaching”. According to Tanner and Tanner (1980:636) teachers at this level operate at an Imitative-Maintenance level where they

rely on textbooks, workbooks, and routine activities, subject by subject. Skills are treated as dead ends rather than as means of generating further learning. Ready-made materials are used without critical evaluation, resulting in a multiplicity of isolated skill development activities.

Fullan (1992:114) calls this a process of intensification “that serve to intensify as exactly as possible the what and how of teaching”.

A HOD who had the following to say reflected despondency on the part of the HODs, curriculum co-ordinators and educators:

The Department is totally unfair to introduce a new Learning Area such as EMS knowing that we do not have the necessary qualification or experience in teaching EMS. Furthermore, they still expect us to perform at our best.

This highlights what Bell in Coleman & Anderson (2002:188) asserts that, “teachers should not take in responsibilities ... which are not within their sphere of competence. Nor should their work be subject to arbitrary change”. This despondency of teaching in a Learning Area outside of their competence led to what one HOD argued that

Teachers with no knowledge are forced to teach a subject which they have little or which they are not empowered to teach. This therefore affects the morale of the teachers and if the morale of the teachers is low, then his output is definitely going to be affected.

It can therefore be argued that due to lack of fundamental knowledge in EMS, the already segmented EMS curriculum “is further fragmented” (Tanner and Tanner, 1980:636).

Figure 6 What is your role in EMS?

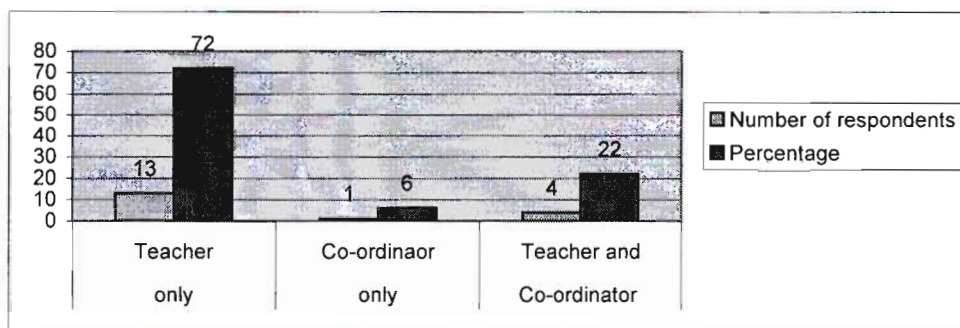


Fig. 6 indicates that 13 (72 %) educators teaching EMS were teachers only and not curriculum co-ordinators. This is of particular relevance as it questions the validity of teachers who claimed to have had knowledge but were not delegated the responsibility of curriculum co-ordination.

Figure 7 If you are a curriculum co-ordinator, please indicate how you were selected?

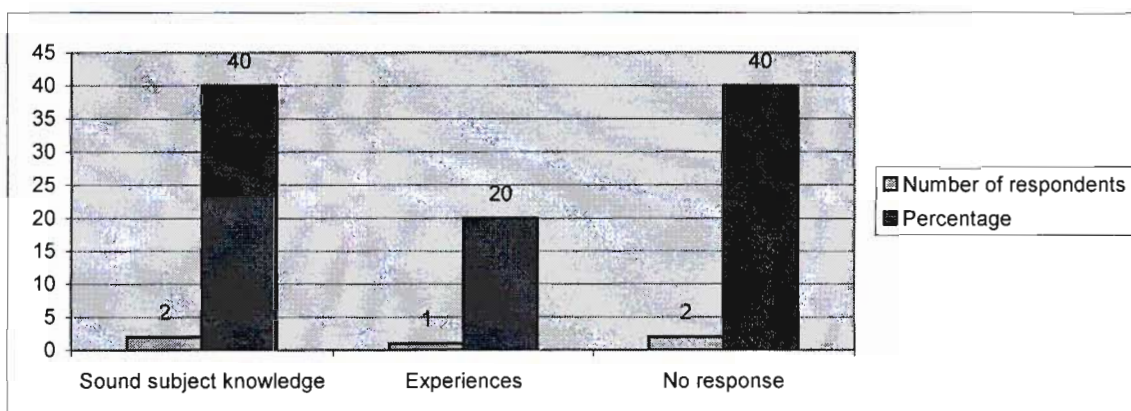


Figure 7 indicates that of the 5 educators in fig. 6 that co-ordinated the EMS curriculum, 2 educators (40%) reported that sound subject knowledge was the reason for them being delegated this responsibility. Educators, at workshops were unanimous that commercial qualifications will help them teach and manage the EMS curriculum better if, according to one educator who the following to say

We get proper and relevant knowledge in EMS; we can manage the curriculum better and design proper work schedules together with daily preparations to ensure proper grade progression.

This re-affirms what Eraut in Bush & West-Burnham (1994) and Hoyle (cited in Harris, Lawn & Prescott (1982) referred to the in-service education empowering educators attending courses of a theoretical kind to answer questions for themselves. This possibly reveals that educators recognized that their “poor grasp of the knowledge structure ... acts as a major inhibition to teaching and learning” (Taylor and Vinjevold as cited in Adler & Reed, 2002:137).

Lack of fundamental knowledge in EMS affects not only the efficacy of the teaching and learning process but also has broader implications for the professionalism of the educators. The rationale for most educators (72 % in fig. 6) not being entrusted with curriculum co-ordination, as one head of department reported that

Not many of my educators who teach the Economics part of the HSS/EMS have proper training in the field, so to delegate curriculum co-ordination to them would be asking for too much from the educators who are already overburdened with high workloads and large classes.

The argument that the HODs were averse to delegating this responsibility on account of them still being held accountable could also hold true. This was pointed out by one HOD present at a workshop who queried

How can one ask teachers to manage the EMS curriculum if they do not fully understand the content themselves? After all, if they knew what and how to teach EMS properly, then they too can and should be asked to co-ordinate the curriculum. Until then, I would prefer not to delegate this responsibility, as I would still be held accountable.

This also re-affirms Maharaj's (1991:79) assertion that

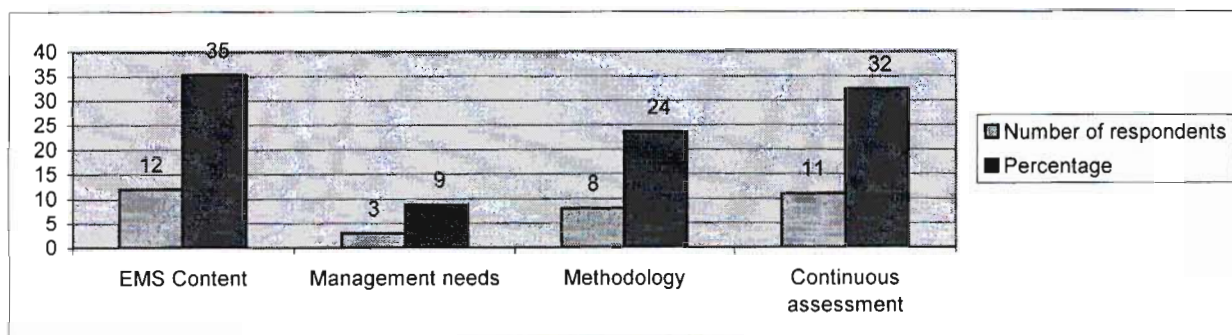
Meaningful teacher-participation in decision-making regarding subject curricular ... will not be possible if teachers are teaching subjects in which they lack the necessary competence and skills.

If Cochran-Smith's claim that "teachers who know more teach better" (cited in Adler & Reed, 2002:1) were true then this could imply that EMS has been and may continue to be marginalized unless further INSET training is undertaken.

However, time did not allow investigating further the 'no response' by 2 educators.

4.4 SECTION C – PROFESSIONAL DEVELOPMENT STRATEGIES

Figure 8 What are your training needs?



In this question, educators were given the choice of identifying more than one of the alternatives as their training needs. Figure 8 therefore shows that EMS content made up 35 percent of the training requirements, whilst continuous assessment and methodology made up a further 32 percent and 24 percent respectively. These training needs as identified by educators constitute fundamental knowledge as defined in Chapter 1.

Through interviews it was established that HODs also identified fundamental knowledge in EMS as their development need to capacitate them in providing appropriate support and advice to their educators.

Of significance is the low preference for management needs. Without further investigation, one can speculate that teachers, in view of few promotional opportunities, were despondent about upward mobility and therefore did not see the need for management courses. Alternatively, the day-to-day realities of teaching could prove inhibiting for management responsibilities as reported by one educator at a workshop that

We teach in very large classes for almost the entire day. We have little time to do any real research and with all the continuous assessments for the large classes, we seldom have time in the afternoon.

Figure 9 To what extent do you find inset training providing sufficient EMS content knowledge?

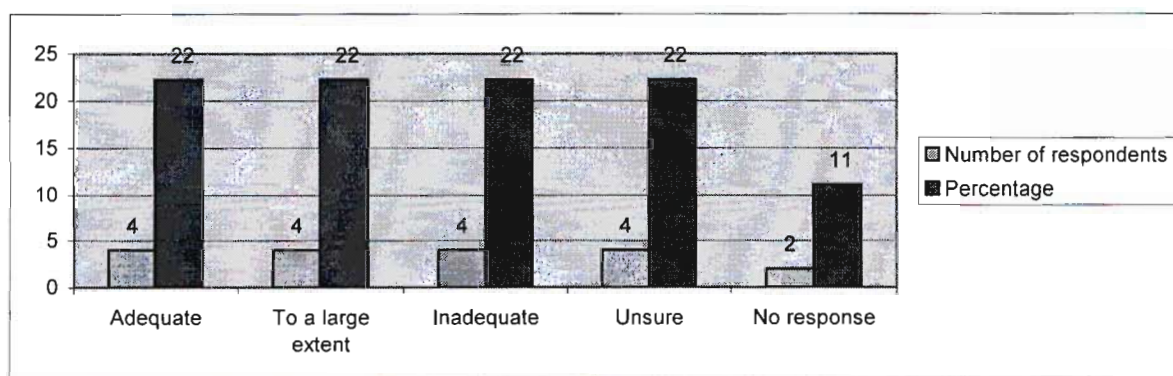


Figure 9 shows that only 4 educators (22 percent) found that training adequately met their needs. This could therefore mean that the high preference for fundamental knowledge as reflected in fig. 8 may not have been met. This was evident at an EMS workshop where an educator felt that

We often find that facilitators concentrate on the generic aspects of OBE and RNCS and ask us to contact our subject advisors for EMS specific contents, whom we have not seen from the time EMS was introduced.

Another educator also expressed concern that

We are experiencing extreme difficulty in integrating the EMS content with the other Learning Area. We do not know how to integrate with other Learning Areas as we lack the knowledge in the EMS field. This also affects our ability to assess pupils fairly.

Furthermore, the extent to which training needs were not being met could be deduced from one educator's query that asked

Why did the Department not have proper training for the educators before introducing new Learning Areas such as EMS?

This highlights the extent of the problems educators faced when INSET training did not capacitate educators with sufficient EMS content knowledge.

From a management perspective, interview responses indicated that HODs were of the view that INSET training hasn't really empowered them. It was the contention of one HOD that

Although not very much was said to us and not much guidance was given to us at the RNCS workshop because they were not looking at specific Learning Area but was very general.

HODs have therefore argued that the training that they have attended hasn't capacitated them in providing support to their EMS educators.

This leads to what Henderson and Perry in Pather (1995:75) called a "mismatch between the needs of the teacher and the course content".

Without further investigation, the analysis of the unsure responses and no responses was not possible.

Figure 10 Are EMS support materials provided sufficient?

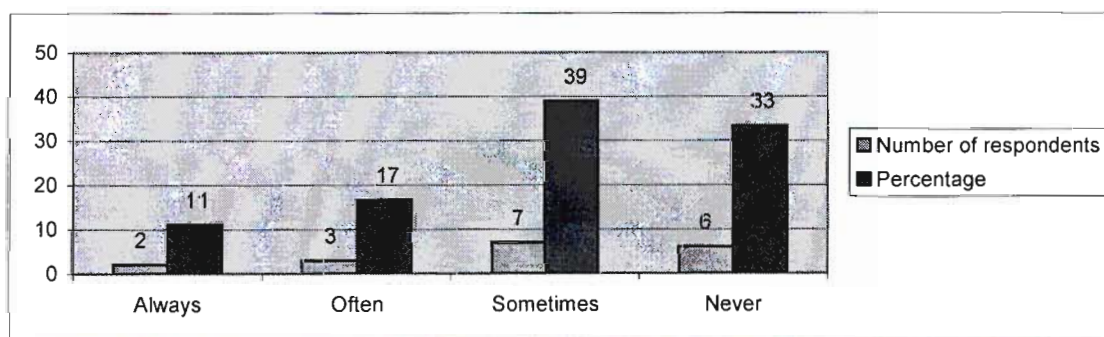


Figure 10 indicates that 6 educators (33 percent) found that EMS support materials provided were insufficient. Figure 10 also reveals that a further 7 educators (39 percent) found that workshops sometimes provided EMS materials.

Apart from training needs not being adequately met as reflected in figure 9, EMS is further marginalized through a paucity of EMS support materials. An educator, echoing the sentiments of EMS educators at a workshop, pointed out that

The prescribed or recommended textbooks for HSS/EMS has only about a quarter of the information dedicated to EMS and the rest is on HSS. The amount of EMS information contained in these textbooks can be covered in only one term. Thereafter, we are at a loss regarding what to teach.

As a result of the lack of sufficient EMS materials, an educator at a workshop reported that

With the EMS content being so little to complete, we would rather have pupils constructively occupied doing HSS during the combined HSS/EMS periods than not doing anything at all.

This “justification” of not wasting time in class defeats the purpose of having introduced EMS to develop entrepreneurial skills in learners.

The claims of various educators that EMS support materials was insufficient was corroborated by one HOD who felt that

More time is being spent on HSS than on EMS.

The lack of sufficient EMS support material, exacerbated by a lack of appropriate and adequate training and the high rate of un- and under- qualified EMS educators is bound to lead to what one HOD argued

The marginalisation of the EMS curriculum.

Table 2
Please rank which level of workshops most effectively meets your training needs.

		Most effective	Effective	Less effective	Least effective	No response	Total
Cluster	Number	2	5	3	1	7	18
	Percent	11.11	27.78	16.67	5.56	38.89	100
District	Number	5	3	3	-	7	18
		27.78	16.67	16.67		38.89	100
Provincial	Number	1	2	1	5	9	18
	Percent	5.56	11.11	5.56	27.78	50	100
School	Number	6	3	2	2	5	18
	Percent	33.33	16.67	11.11	11.11	27.78	100

Table 2 shows that 6 educators (33.33 percent) indicated that school level workshops most effectively met their training needs. The salient point about wanting school-based professional development as cited by one educator at a workshop was

When we have a problem, we need to resolve it at that point and not have to wait for a workshop to be held at some future date.

The sentiment expressed by one HOD, which was shared by other HODs, was that school level development was the most effective as it allowed for

open discussions at subject committee level where teachers can feel free to raise whatever concerns they have. Peer assistance, where what one finds difficult, someone else from the department can come up with an idea ... to make it easier.

This is corroborated by research and experience of McLaughlin, Marsh and Goodlad in Pather (1995:206) who advocate that “schools as being the most suitable venues for INSET for this is where problems and needs exist”.

Educators also cited contextual factors such as availability of other educators, travel arrangements, regularity of discussions, personal and hands-on approach that makes school level workshops more attractive.

This implies the use of the school as a “continuous training ground, through general staff room discussion, the sharing of experiences through such practices as ‘shadowing’ in which younger teachers observe experienced colleagues at work” (Murphy, 1987:22).

Christiansen in Murphy (1987), therefore suggests, that the best learning environment is one that not only meets the needs of the student, but also in which the teacher receives emotional and administrative support. It therefore stands to reason that, “schools will be the most popular location as needs frequently originate from this source and teachers, also as the target group; are easily accessible (Pather, 1995:207).

However, table 2 also shows that 5 educators (27.78 percent) showed preference for district level workshops as most effectively meeting their training needs. Educators at workshops also shared the view expressed by one participant that district level workshops allowed

Educators to meet to exchange and share wider views and ideas from a broader spectrum of schools. It brings all teachers of EMS together so that more knowledge is gained through such interaction. We also find that most support and subject content is provided at district level

From a management perspective, it was found that the general consensus of HODs regarding district level workshops was captured by the response of one HOD. He had the following to say:

Teachers of the same Learning Area sit together and discuss the work schedules to develop uniformity at district level. This also helps the pupils when moving from one school to another, there would not be a gap or void. Discussions at district level helps so that the problem areas and challenges can be better handled and sorted out.

This is also corroborated by Elliot's claims (cited in Pather, 1995:206) that "off-site INSET has the advantage of allowing teachers from different environments to engage in discussing common problems". Elliot (in Pather, 1995:206) also argued that these meetings allow for professional exchange to take place. Such interaction also reduces teacher isolation, which one HOD has argued that

What we've decided to do now is not to work in isolation because that was also a problem. We sat and designed a lesson on our own and we tried to figure out EMS on our own. It was difficult.

However, whilst the "no responses" needed further investigation, it was of great concern that table 2 shows that 5 educators (27.78 percent) indicated that provincial level workshops were least effective in meeting their training needs. The general consensus of educators at workshops expressed by a participant was that

Provincial level workshops rarely take our needs into account and therefore does not always meet our training needs.

It must be stressed that professional development workshops hosted at different levels serve different purposes and are therefore appropriate within their contexts. Therefore, depending on the needs of educators and the type of INSET that is being offered; different locations are required.

Figure 11 Do you receive support to ensure that the training you receive at workshops translates into practice at school?

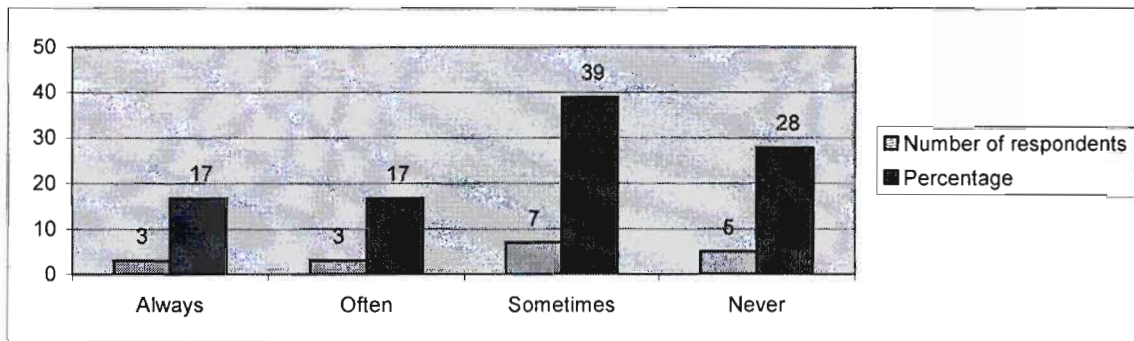


Figure 11 shows that 5 educators (28 percent) indicated that they never received support from facilitators to ensure that the training they received was effectively translated into practice at school. A further 7 educators (39 percent) also indicated that they received support only sometimes. This reflects that educators rarely receive any support at school to ensure that what has been discussed at workshops is properly implemented at schools. Without proper support structures, whereby facilitators of initial training come to schools to assist educators to effectively translate training into practice, called follow-through, there is no way of gauging the success of the training.

Among other factors, Vivian in Rust & Dalin (1990) deplores the programme deficiency of not ensuring acquired learning being translated into actual teaching. This lack of continuity of training to ensure what Davies and Zaret (cited in Pather, 1995) recommend for the application of teaching skills and bridging theory with practice heightens what Adler (2002) calls the “theory-practice” tension.

An educator therefore complained that

After the workshops are held, we are left to our own resources to implement numerous changes that are expected in the curriculum. We find it extremely difficult that sometimes even the facilitators cannot provide us with sufficient information. This leads to confusion and frustrates us. The Subject Advisors are difficult to contact.

This stage of professional development is as important as conducting the workshop itself

TABLE 3:

Are follow-up workshops conducted at the following levels?

		Adequate	To a large extent	Inadequate	Not at all	No response	Total
School level	Number	6	1	6	3	2	18
	Percent	33.33	5.56	33.33	16.67	11.11	100
Cluster level	Number	3	-	8	3	4	18
	Percent	16.67		44.44	16.67	22.22	100
District level	Number	6	1	4	4	3	18
	Percent	33.33	5.56	22.22	22.22	16.67	100
Province level	Number	2	-	3	9	4	18
	Percent	11.11		16.67	50	22.22	100

Table 3 shows that 6 educators (33.33 percent) found adequate follow-up workshops were conducted at both the school and the district level. Table 3 also shows that 9 educators (50 %) found that no follow-up workshops took place at provincial level. This is corroborated by the preferences indicated in table 2 that school and district level workshops most effectively met educators' training needs whereas provincial level workshops were least effective.

It must be pointed out that follow-up workshops encourage implementation and reflection on the part of educators for further discussions. Without follow-up workshops, testing efficacy of initial training becomes almost impossible. Furthermore, one educator at an EMS workshop argued that

Without follow-up workshops, there is no way for me to double check whether what I have been doing since the initial training is correct, nor do I have an opportunity to discuss my problems encountered.

In view of a lack of follow-through and insufficient follow-up workshops, HODs have instituted a process whereby educators have to provide report-back following attendance at workshops. One HOD felt that this report-back process

leads to confusion, as teachers, through their own filtration processes, often provide report-back on what they perceive as important thus omitting some salient points of the workshops.

Whilst Daresh in Pather (1995:77) concludes, "INSET is viewed as more effective when it is part of training that continues over an extended period of time" findings in this research indicate that because of a lack of follow-up and follow-through INSET may be ineffective.

The lack of follow-up and follow-through also concurs with what Hartshorne in Pather (1995:77) has found that “course members have minimum communication with programme leaders after they return to their schools. This does not allow for much development and can minimise change both in the individual and the school”.

Figure 12 Are facilitators adequately trained to conduct workshops hosted by the department?

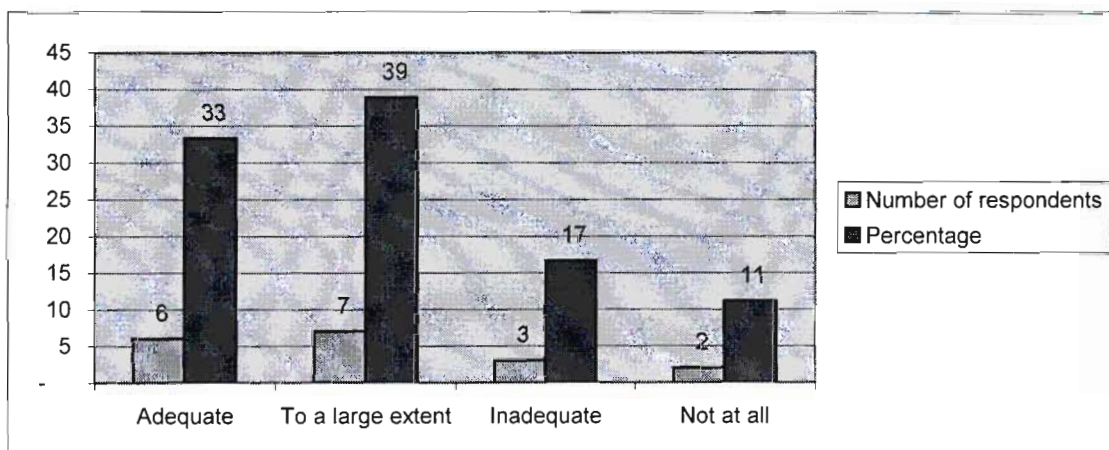


Fig. 12 indicates that only 2 educators (17 percent) found that facilitators were not adequately trained to conduct workshops. It is also shown that 6 educators (33 percent) found facilitators to be adequately trained whereas 7 educators (39 percent) found that facilitators were trained to a large extent to conduct workshops. This indicates that facilitators essentially have relevant skills to facilitate workshops. However, adequately trained facilitators alone do not ensure that workshops can achieve any degree of success. Other factors, such as follow-up and support, in combination, determine the success of any INSET programme.

However, one HOD has complained that

We have the knowledge but we do not have or we lack the skills in terms of putting it forward to the teachers in terms of facilitating the workshops

HODs have therefore argued that they experience difficulty in conducting in-house workshops to provide further support to educators.

4.5 SECTION D – CHALLENGES OF INSET PROGRAMMES

TABLE 4

Are teachers needs taken into consideration when designing workshops?

		Always	Often	Sometimes	Never	No response	Total
School level	Number	1	5	8	2	2	18
	Percent	5.56	27.78	44.44	11.11	11.11	100
Cluster level	Number	1	1	11	2	3	18
	Percent	5.56	5.56	61.11	11.11	16.67	100
District level	Number		4	7	4	3	18
	Percent		22.22	38.89	22.22	16.67	100
Province level	Number		1	5	9	3	18
	Percent		5.56	27.78	50	16.67	100

Table 4 shows that 5 educators (27.78 percent) found that their needs were being taken into account often at school level. This view is shared by Joyce (cited in Pather, 1995:44) who recommended that “if education is to flourish and if schools are to be a vital force in society, it is necessary to rebuild the school into a life-long learning laboratory not only for the children but also for the teachers”.

A further 4 educators (22.22 percent) found that district level workshops took their training needs into account when designing workshops. It was disappointing to note that 9 educators (50 percent) found that provincial level workshops never took their needs into account when designing workshops. This is contrary to the recommendations of the Kettering Foundation Institute and the Rand Foundation (Tanner and Tanner, 1980:659) that INSET “activities should flow from problems identified by the school staff. At a workshop, it was reported by an educator that

We arrive at a workshop venue not knowing what to expect. Sometimes, it is not our Learning Area but we are asked to attend.

This approach reflects what Rust (1990) and Cheng (1996) contend that traditional approaches to training has been and continues to be externally controlled and planned with a top-down management approach. An educator speaking for other participants at a workshop argued that

We are considered as recipients rather than constructors of knowledge. We often come to these workshops hoping to discuss our problems and generate solutions but we find that we have to sit back and passively receive information from facilitators.

Berg and Hartshorne in Pather (1995) also found that realities of the individual South African school contexts from which the participants come, have little or no bearing in the course design. Van den Berg's writing about Traditional Model in Pather (1995) used overseas and in South Africa corroborates the extent to which educators' needs were overlooked in my findings. Van den Berg and Bolam in Pather (1995) agree, notwithstanding the traditional approach to promoting innovations, traditional models are becoming increasingly problematic as inadequate account is taken of the different school contexts in which it is offered.

However, despite criticisms and drawbacks, the traditional INSET model has certain merits as pointed out by an educator at a workshop that

Meeting teachers at workshops helps us as we get to discuss some of our challenges during breaks. We sometimes learn more from each other than the workshop itself. We also establish contacts and often contact each other after the workshops to exchange ideas and resource materials.

Pather (1995:77) has also found that, "teachers from different backgrounds, in meeting outside their school environment, can become more aware of problems in education, and identify or redefine their needs. They can also evaluate their own work and the status of the subject in their schools in an atmosphere of professional co-operation".

Figure 13 Is it important that you participate in programme design for workshops?

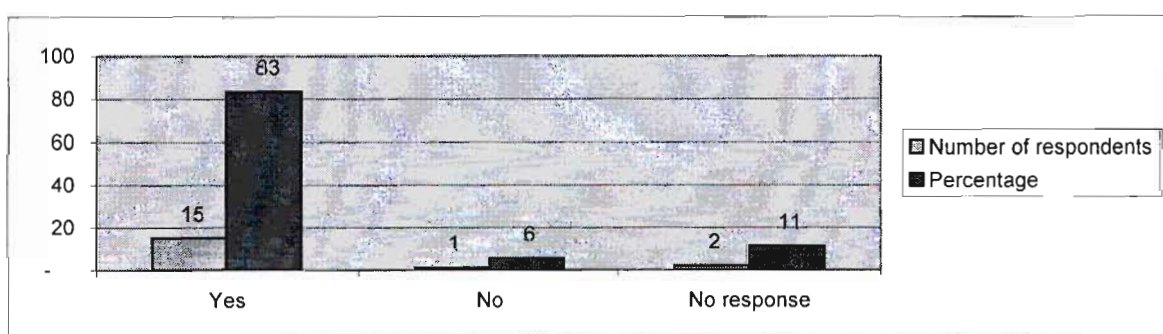


Figure 13 shows that 15 educators (83 percent) preferred the notion that teachers should have a participatory role in programme design for workshops. At a workshop it was established through a participant that

We, as teachers being in direct contact with pupils know the problems and understand the needs of learners and educators and are therefore in the best position to make inputs as to what works at classroom level.

Bush (1994:285) shares this view by stating that, "knowledge acquisition and skills development should ... be more directly related to the substantive problems faced by

teachers”. Maharaj’s (1991) findings also reported similar findings for teacher participation in workshop design. Educator participation in workshop programme design was considered important by one HOD who reported that

It is imperative for educators who are at the grassroots level to decide and design what best suits them and their learners. Educators know from experience what works and what doesn’t.

This correlates with Maharaj’s research (1991:54) where it was found that “Teachers are responsible for the operationalisation of the curriculum. They should therefore, have a say in the ‘what’ and the ‘how’ of the curriculum”.

The reasons for participatory role in programme design proffered by educators is shared by Pather (1995:70) who recommended that

Learners should be given opportunities to participate in the planning and delivering of INSET programmes. It is in an environment that allows adults to set their own standards and work at a pace determined jointly by course-leader and participant.

Morant in Pather (1995:100) argues “continuous feedback both from teachers and pupils also assists in correcting deficiencies and effecting modifications during the implementation phase of INSET”. It is only during the period of consolidation that the revisions to the programme can be minimized.

Figure 14 Do INSET workshops empower me to integrate theory into practice?

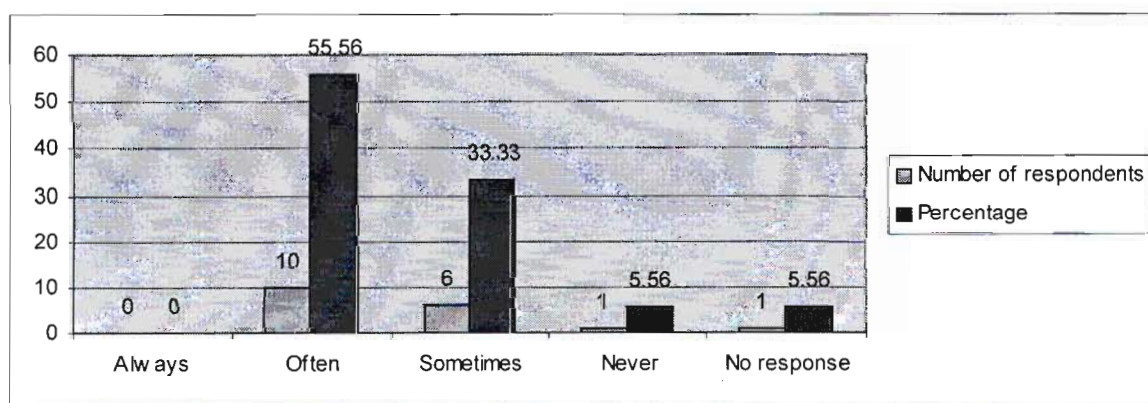


Figure 14 show that 10 educators (55.56 percent) indicated that INSET programmes empowered them to integrate theory into practice. However, figure 11 reveal that educators seldom got follow-through support to ensure that this integration of theory into practice took place. HODs at interviews generally refuted this claim. Their concern as enunciated by one HOD was that

Educators are experiencing difficulty with marrying the theory with the practical aspects of the EMS.

Since the theory-practice tension revolves around how to combine learning through a distancing process with experience, little can be achieved if no monitoring or mentoring is in place to ensure that not only do educators apply theory but also that it is being applied correctly.

Figure 15 Do INSET programmes empower me to cope with the various changes in education?

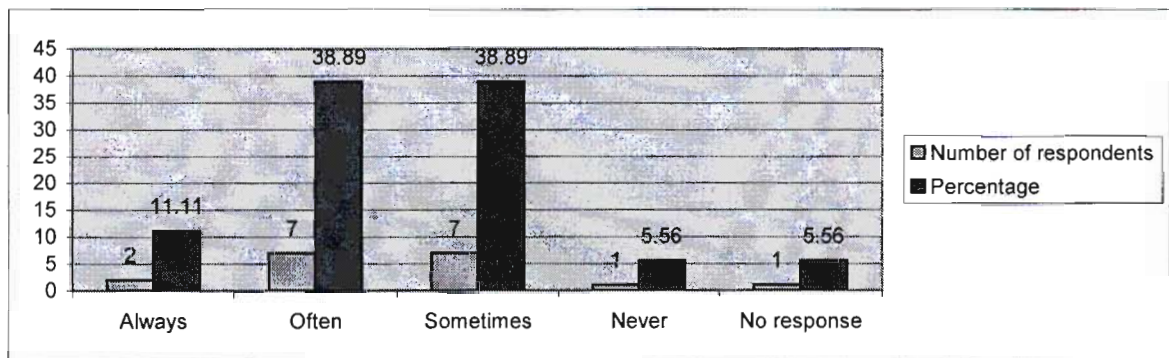


Figure 15 shows that 7 educators (38.89 percent) indicated that INSET programmes did empower them to cope with the various changes in education. It also reveals that a further 7 educators (38.89 percent) found that INSET programmes sometimes provided capacity in them to cope with changes. However, this was not corroborated by educators at EMS workshops where it was pointed out by one educator that

The volume and pace of change from content-based education to OBE and now to RNCS has been too quick with too much information but not sufficient workshops to fully enlighten us on how to cope. Other internal changes such as much larger classes in small classrooms, fewer teachers and overload make teaching a frustrating job.

Whilst acknowledging that educators found that INSET programmes empowered them to cope with changes, it must be noted that “change is a process and not an event: delivering a programme at a course is an event but the process through teacher support of various types can take a long period” (Pather, 1995:135). Therefore professional development strategies with insufficient follow-up (table 3) and follow-through (fig. 11) workshops and educators’ needs not always being taken into account “can negatively affect change” (Pather, 1995:134).

Pather (1995:134) also concludes “there is no one type of strategy that can be applied to promote all types of innovation. Certain combinations are recommended”.

Figure 16 Do you think that support should be combined with supervision?

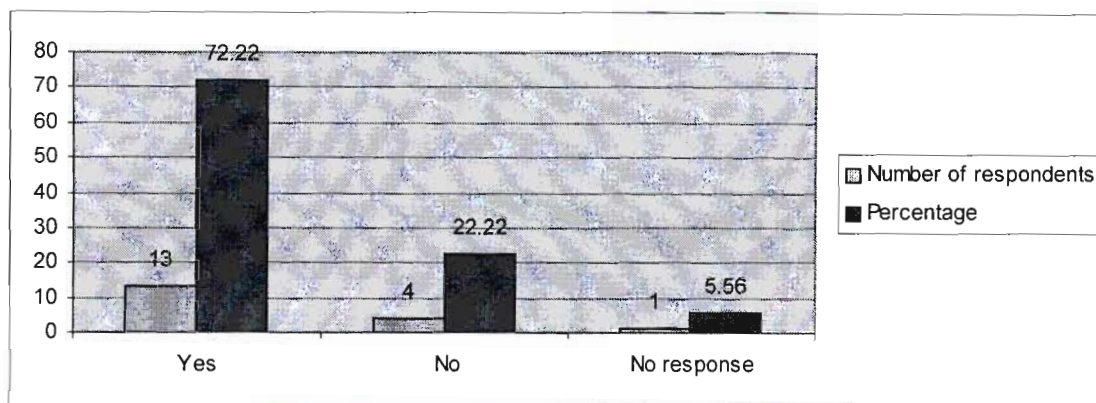


Figure 16 show that 13 educators (72.22 percent) preferred that support should be combined with supervision. However, closer examination of responses in the questionnaire revealed that one educator was of the view that

A mentoring perspective needs to be adopted to encourage discussions between educators and senior management at school.

Synthesis of teachers’ response in the questionnaires reveals that supervision, if combined with support, will encourage discussions, provide feedback and change strategies immediately and at correct juncture to overcome shortfall. Appropriate supervision will also enable educators to monitor progress and help implement changes.

According to Tanner and Tanner (1980), the role of HODs and curriculum co-ordinators, has been and still continues to be to help “teachers provide quality education experiences for children and youth”.

It must be stressed that although it is the responsibility of HODs to provide support, the capacity to provide this support is contingent upon HODs and curriculum co-ordinators having relevant knowledge. One HOD interviewed reported that

I am not an EMS teacher and as regards advice, as managers of schools, without content you can’t really give advice confidently. It’s very difficult for you in appreciating the intricacies of the EMS curriculum and therefore cannot help our educators in interpreting the curriculum for implementation

Another HOD at an EMS workshop had the following to say:

We need to give them a correct direction to follow. A direction you know will result in something constructive. But, unfortunately, we ourselves are wanting in this Learning area and therefore giving advice is confined to general issues of administration.

Furthermore, whilst some HODs have empowered themselves with information gleaned through copious amount of reading, relevant skills to facilitate professional development is also important. One HOD has reported that

What's relevant is we have the knowledge but we do not have or we lack the skills in terms of putting it forward to the teachers in terms of facilitating the workshops.

Therefore, without fundamental knowledge and relevant facilitation skills being developed among HODs, support to educators could be minimal.

Whilst it was generally accepted that supervision should be combined with support, HODs felt that due to inadequate time, the provisioning of support for discussion, reflection and arriving at solutions to their daily problems often proved untenable. One HOD reported that

I also have a form class and I am teaching equal hours as the level 1 educator and there's little time left for me to give special support to teachers.

According to Miel in Tanner and Tanner (1980:659) "it is obvious that there can be no progress on curriculum improvement unless time is given to it".

However, figure 16 also shows that 4 educators (22.22 percent) chose not to have supervision combined with support. An analysis of their reasons as reflected in the questionnaire showed that they felt that supervision caused tension and should therefore not be combined with support. It was disturbing to note that one educator at a workshop expressed the view that

Qualified teachers do not need further supervision.

4.6 EMERGING ISSUES

This chapter has presented data collected through both the quantitative and qualitative methods. Data from different sources were compared, analysed and presented in an integrative basis.

Section A showed that there still exists a high number of unqualified educators in the system. Upon closer examination and according to Bells' assertion in Coleman & Anderson (2002:188), that "teachers should not take in responsibilities ... which is not within their sphere of competence", it could therefore be interpreted that most educators in this sample, through lack of relevant competencies, are unqualified.

Section B addressed the issue of fundamental knowledge in EMS among HODs, curriculum co-ordinators and level 1 educators. Data presented reveals that there exists a lack of fundamental knowledge in the EMS Learning Area among all educators and HODs at school. It was also found that as a result of the lack of fundamental knowledge, many educators sought rigid adherence to textbooks and prescribed methods. This leads to educators being "restricted professional" (Harris, 1982:282) as they operate at an "Imitative-Maintenance level" (Tanner and Tanner, 1980:636). This section also found that educators with commercial qualifications taught and managed the EMS curriculum better.

Section C showed that whilst educators knew what their training needs were, INSET programmes did not necessarily meet their requirements. It was established that most INSET programmes were of a generic nature leaving the subject specific knowledge to the resources of the educators. Furthermore, it was pointed out that school level and district level INSET programmes were considered most effective in meeting the requirements of educators. However, a major deficiency in the provisioning of INSET programmes identified revolves around the lack of sufficient continuous in-school follow-through and follow-up workshops.

It was also found that the EMS support materials provided were not sufficient to meet the demands of the curriculum. This lack of sufficient EMS support materials has led to Human and Social Sciences learning are being favoured over EMS.

Section D has identified that one of the challenges facing INSET programmes was the need to factor educators' needs into programme design. INSET programmes must also design programmes with continuity built in from the inception so that changes being implemented can be tracked and necessary amendments to training strategies can be effected. It was also found that whilst the majority of educators felt that support should be combined with supervision, relevant capacities must be developed in educators and supervisors to facilitate this process.

Findings in this research therefore confirm that there exists a lack of fundamental knowledge among all educators in the EMS learning area and that unless proper measures are put into place, EMS will continue to be marginalized. Findings also showed that the existing INSET strategies are not necessarily effective in changing the landscape in the EMS learning area. It is against this backdrop that conclusions and recommendations are made in Chapter 5.

CHAPTER FIVE

SUMMARY, CONCLUSIONS AND RECOMMENDATIONS

5.1 INTRODUCTION

The purpose of this study was to examine current capacity building strategies of EMS educators in place in terms of their nature and their extent of effectiveness and the attendant challenges with particular reference to primary schools.

This chapter addresses the summary, conclusions and recommendations. First the entire research process adopted is summarized. Second, conclusions arrived at are given. These conclusions are a response to the key questions of the study. Third and final, recommendations are forwarded. These are in line with the conclusions reached.

5.2 SUMMARY OF THE RESEARCH

This research report unfolded through five chapters. Chapter 1 represented the research problem, questions and its setting. Chapter 2 reviewed literature around definitions of professional development, aims of INSET and approaches for professional development. It also presented some challenges for professional development. Chapter 3 described the research methodology. The study adopted the qualitative research design involving a case study of 5 primary schools within the Ethekwini Region in KwaZulu-Natal Department of Education. Chapter 4 presented and discussed the findings. This involved the analysis and interpretation of data collected through questionnaires, interviews and observations. From this research process conclusions regarding current capacity building strategies were reached. These are addressed in the next section.

5.3 CONCLUSIONS

Research question 1: “Do heads of department, curriculum co-ordinators and level 1 educators have fundamental knowledge in the EMS learning area?” In response to this question, findings in this research indicated that educators who taught EMS were either un- or under-qualified or lacked relevant qualifications to teach in the EMS

learning area. Despite the fact that teachers attended workshops, EMS educators were still unsure about what and how to teach in the EMS learning area. This was indicative in part to the lack of fundamental knowledge in the EMS learning area.

Research question 2: “Are current development strategies sufficient and effective in capacitating heads of department, curriculum co-ordinators and level 1 educators to manage the EMS learning area? Findings in this research revealed that there was a lack of congruence of workshops conducted and the needs of educators. This lack of congruence stemmed from a variety of professional development short courses that were offered on an ad hoc basis with minimal educator participation, follow-up or follow-through. Therefore, it can be concluded that there exists a mismatch between the needs of the EMS educators and the provisions made by the department for professional development (PD).

Research question 3: “What are the challenges being faced in these processes?”

Arising from the lack of fundamental EMS knowledge and a mismatch of development strategies, educators were at varied performance levels and therefore their outputs were very varied. There is therefore a need to standardize the output of all EMS educators. However narrowing this gap poses a challenge. Furthermore, lack of facilitation skills among heads of department (HODs), the constraints of timetables and high workloads for all educators including HODs, also posed a major challenge for school level professional development. It was also found that limited funding exacerbated the paucity of resource materials in the EMS learning area.

As a result of the lack of fundamental knowledge, scarcity of resources and the attendant challenges facing educators including HODs, educators and HODs sought increased definition of curriculum, adhered to specifications of teaching and administrative methods. Furthermore, the positive correlation that would have existed between the levels of educator proficiency, educator confidence and learner achievement has been adversely affected.

5.4 RECOMMENDATIONS

In light of the conclusions identified above, a few recommendations are forwarded.

With EMS educators being at different levels of ability and output, differing strategies must cater separately for unqualified, under-qualified and qualified educators. It must be acknowledged that no single approach can accomplish the desired results.

The first categorization of professional development (PD) strategy should be for the supply of qualified educators to the system. One way of improving the supply and performance of the teaching force at large is to include broadening of entry routes into the profession.

The second categorization of PD strategy should be for those un- and under-qualified educators. INSET programmes, such as the National Professional Diploma in Education (NPDE) and Advanced Certificate in Education (ACE) should address the issue of in-service professional qualifications.

Initial training and INSET programmes such as NPDE and ACE must be seen as the foundation on which further continuous PD courses will be undertaken to address the organic and dynamic nature of teaching.

Having addressed the need to acquire professional and relevant qualifications, teachers should be released part time to profit from a systematic programme of PD, guidance and further study where necessary. Systematic extended period INSET training programmes, at specifically equipped training institutes, should immediately address the existing lack of fundamental knowledge among EMS educators. Through this distancing process, educators will be able to reflect theoretically on training without worrying about the day-to-day realities of teaching. This kind of training should empower educators to become constructors of knowledge and operate at the Creative-Generative level (Tanner and Tanner, 1980). In order to release educators from schools to attend such courses, a database of substitute educators should be maintained to provide relief to schools from where teachers are taken for professional development programmes. It is also acknowledged that this may cause downstream problem regarding funding of such a strategy. In view of this, collaborations between schools, businesses and NGOs could develop innovative means of providing funding.

Alternatively, through mutual agreement between educators, programme organizers and DoE, these extended programmes could be held during holidays and weekends.

As each school develops its own eco-system and ethos in response to the patterns that are both culturally determined and organically related to socio-economic environment, educators' and teacher representative bodies' participation in programme design and implementation must be acknowledged and facilitated. It was evident from responses that the constant contact with what teachers wanted and what was affecting their studies could only be achieved by constant communication. Stakeholders' involvement in the planning and administration of PD enables programme organisers to make adjustments to the programme to ensure coherence between educator needs, school needs and curriculum imperatives. This means that PD strategies must adopt the participatory approach and recognise educators' daily classroom experiences.

In encouraging participatory PD approaches, it should be acknowledged that more collaborative decision-making structures for INSET must ensure that educators will be provided with an on-going support system without which it will be difficult for one to successfully implement ideas discussed at courses. Support can range from the provision of resources such as latest news bulletins, learner and educator support materials, etc, empathy from management to more collaboration with businesses and NGOs.

Whilst the school should be the nucleus of most development activities, confining PD activities to school level only carries the inherent danger of teacher isolation and further fragmentation of the EMS curriculum. School-based approaches also face the danger of substitution of site-based programmes for central responsibilities, such as initiation of curriculum reform and the concomitant provisioning of support materials for such reformation. Therefore, school focused programmes must be supplemented by more generic programmes hosted at centralized venues to achieve coherence of school curriculum with provincial imperatives.

In order to facilitate PD of educators, certain important infrastructure must be established by the Department of Education (DoE). The DoE must institute on-going Advocacy campaign to generate intrinsic motivation in educators to jointly develop

educator competencies. Advocacy alone isn't sufficient, therefore the DoE must establish a clear National and Provincial INSET policy document that clearly articulates and documents its objectives. In putting into effect these policies, due cognizance must be taken that INSET programmes seem to be most effective at district and school level. When school level PD is considered it must be acknowledged that both the heads of department (HODs) and the principals are the vanguard of change. Therefore HODs and principals should also take the initiative in creating opportunities for teachers to participate in decision-making at school. The constraints of time, large classes, etc., which educators have posed as problems in this research, are matters which fall under the purview of the principal and school governing body. They should be able to resolve these in a creative way. The principal and staff can undertake periodic whole-school review and together with the skill development facilitators, offer INSET on a development basis.

Furthermore, with HODs being in the forefront of providing support to educators, it becomes crucial that they be developed not only in EMS subject specific knowledge but also in facilitation skills. Heads of department or any other educator must also be developed as a "key" educator to act a skills development facilitator to help co-ordinate and conduct workshops.

Given the current shortage of support materials, fully resourced nucleus schools within clusters should be established by the DoE. Whilst funding from the DoE may prove problematic, creative ways through collaborations with other education stakeholders may be an alternative route. The nucleus schools should facilitate the sharing of resources to increase capacity of neighbouring schools. These efforts will assist schools within their contextual realities, however, schools do not exist in isolation.

In order to prevent schools from working in isolation, district core-training teams (DCTT) must be established. It would be the responsibility of the DCTT to liaise with the skills development facilitators at school and cluster levels to organize and conduct development programmes. The aim of these district level programmes will be to ensure coherence of school level programmes with provincial curriculum prerogatives. All DCTT must be fully trained by the provincial core training team (PCTT).

PCTT and DCTT must collaboratively train and develop skills development facilitators (SDFs) to serve at cluster and school levels. These SDFs must be mandated to identify needs of educators and co-ordinate PD activities. Most importantly, SDFs must also provide follow-through support to ensure that what is learnt at training is implemented at schools. SDFs must also encourage subject-committees to be established at cluster levels.

Having established proper infrastructure for professional development, subject advisors must be deployed at district offices to provide administrative, professional and subject specific support to all educators within the district.

Having put into place the infrastructure for professional development, educators must be convinced that developing competencies is a joint responsibility of all stakeholders in education. However, one must accept that the legacy of apartheid, and the concomitant orientation towards a particular conception of curriculum practice and teacher professionalism in this country, has made people grow accustomed to being told what to do and how to do it. Breaking away from this mould will entail a need for a paradigm shift in management to embrace democratic, participatory leadership styles, collegiality and collaborative consensus making that will make it possible for educators to want to behave as “extended professionals”.

In conclusion, if the existing mismatch between PD strategies and educators’ needs is not met with a radical paradigm shift in PD approaches, then INSET programmes will continue to prove sterile.

Therefore, in formalizing the delivery of PD, organizers must take cognisance of the wealth of experience that exists among educators. Continuous professional teacher development must be seen, as an evolving set of activities that should respond to the specific contextual needs of teachers at different stages in their lifelong development as professionals. Teachers therefore require opportunities to develop their professional judgement, to experiment with alternatives and to observe other teachers’ involvement in classroom practice. Professional development must therefore encompass modelling, one-to-one coaching, practice, reflection and feedback.

It is the recognition of the diverse nature of educators' teaching and learning experiences that would give greater value to what should be offered and which designers of programmes must be sensitive to in the development of INSET programmes.

Whilst it is desirable for programmes to offer the generic imperatives of the curriculum, it is as important for the programme to give due recognition to the particularities, peculiarities and idiosyncrasies of different learning contexts beyond the superficial. Sensitivity to and recognition of these variables will force authors of programmes to develop contextually relevant PD material.

Endorsement of Continuous Professional Development and Support (CPDS) as a policy is an essential precursor to our endeavours to re-skill our educator core for relevance.

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APPENDIX A

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The EMS Educators

RESEARCH – CONTINUOUS PROFESSIONAL DEVELOPMENT AND SUPPORT FOR EMS EDUCATORS

I, R.S. Dorasamy, am currently reading for my Master of Education degree at the University of KwaZulu-Natal, School of Education. My current research focus is on current trends in professional development of Economic and Management Science (EMS) educators in primary schools.

You have been selected to participate in a research project to establish the perceptions of continuous professional development and support that helps build capacities in educators. The value of the research will depend on your candid and sincere contribution.

Confidentiality and anonymity of responses are guaranteed. You have the prerogative to participate or not to participate in this research.

Completed questionnaire are to be deposited into the box provided for them in the staff room of your school. I will collect these boxes on Wednesday 3 November 2004.

I thank you in anticipation of receiving your return.

Yours in education

RS Dorasamy

APPENDIX B

QUESTIONNAIRE

SECTION A – BIOGRAPHICAL DATA

1. Teaching experience _____ years.
2. Teaching at your current school _____ years.
3. (a) Do you have a teaching qualification?

☐ Yes ☐ No

(b) Academic qualification – Please tick appropriate box(es)

☐ B.A. ☐ B.COM ☐ B.ADMIN ☐ B.SC

☐ OTHER - Please specify: _____

SECTION B - YOUR CONTENT KNOWLEDGE OF ECONOMIC AND MANAGEMENT SCIENCES (EMS)

Please tick relevant Box and write your response where necessary.

4. Do you have 'subject specific' (content) knowledge in the EMS learning area?

☐ Yes ☐ No

5. How do you rank your EMS knowledge?

☐ Poor ☐ Above average
☐ Average ☐ Adequate

6. What is your role in EMS?

☐ Teacher only ☐ Co-ordinator only ☐ Teacher & co-ordinator

7. If you are a curriculum co-ordinator, please indicate how you were selected?

☐ Sound subject knowledge ☐ Experience

☐ Other, please specify _____

8. Do you think that commercial qualifications such as B.Com, B. Admin, etc helps you to teach EMS better?

1	2	3	4
Strongly disagree	Disagree	Agree	Strongly agree

9. Do you think that qualification(s) with a commercial bias helps you to manage the EMS curriculum more effectively?

1	2	3	4
Strongly disagree	Disagree	Agree	Strongly agree

SECTION C – PROFESSIONAL DEVELOPMENT STRATEGIES

10. What are your training needs? You may tick more than one box.

<input type="checkbox"/> EMS content	<input type="checkbox"/> Methodology
<input type="checkbox"/> Management needs	<input type="checkbox"/> Continuous Assessment

11. To what extent do you find INSET training providing sufficient EMS content knowledge?

Adequate		To a large extent		Inadequate		Unsure	
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12. Are EMS support materials provided sufficient?

Always		Often		Sometimes		Never	
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13. (a) Please rank which level of workshops most effectively meets your training needs.

1 = most effective; 2 = effective; 3 = less effective and 4 = least effective

<input type="checkbox"/>	Cluster level
<input type="checkbox"/>	District level
<input type="checkbox"/>	Provincial level
<input type="checkbox"/>	School level

13. (b) Please justify your number **one** choice

14. Do you receive support to ensure that the training you receive at workshops translates into practice at school?

Always		Often		Sometimes		Never	
--------	--	-------	--	-----------	--	-------	--

15. Are follow-up workshops conducted at the following levels? Please respond to each level by placing a tick in the appropriate box.

At School level	1	2	3	4
	Adequate	To a large extent	Inadequate	Not at all
At Cluster level	1	2	3	4
	Adequate	To a large extent	Inadequate	Not at all
At District level	1	2	3	4
	Adequate	To a large extent	Inadequate	Not at all
At Provincial level	1	2	3	4
	Adequate	To a large extent	Inadequate	Not at all

16. Are facilitators adequately trained to conduct workshops hosted by the department?

1	2	3	4
Adequate	To a large extent	Inadequate	Not at all

17. Do other outside agencies, such as Non-Government Organisations (NGO), conduct training programmes?

Always		Often		Sometimes		Never	
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18. Do you feel that the NGOs are better equipped than department trainers to conduct training?

1	2	3	4
Strongly disagree	Disagree	Agree	Strongly agree

SECTION D – CHALLENGES OF INSET PROGRAMMES

19. How effective is the cascading model of training of educators?

1	2	3	4
Highly effective	Effective	Less effective	Not effective

20. Are your needs taken into consideration in the planning and designing of the workshops? Please respond to each level by ticking in the appropriate box.

School level	Always		Often		Sometimes		Never	
--------------	--------	--	-------	--	-----------	--	-------	--

Cluster level	Always		Often		Sometimes		Never	
---------------	--------	--	-------	--	-----------	--	-------	--

District level	Always		Often		Sometimes		Never	
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Provincial level	Always		Often		Sometimes		Never	
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21. (a) Is it important that you participate in programme design for workshops?

☐ Yes ☐ No

- (b) Please state why.

22. Do INSET workshops empower me to integrate theory into practice?

Always		Often		Sometimes		Never	
--------	--	-------	--	-----------	--	-------	--

23. Do INSET programmes empower me to cope with the various changes in education?

Always		Often		Sometimes		Never	
--------	--	-------	--	-----------	--	-------	--

24. Do you think that INSET programmes are well planned and co-ordinated?

Always		Often		Sometimes		Never	
--------	--	-------	--	-----------	--	-------	--

25. (a) Do you think that support should be combined with supervision?

☐ Yes ☐ No

- (b) Please state why.

26. Please list some of the challenges you face in teaching and/or managing the EMS curriculum.

27. What would you think are some of the solutions to the challenges identified in question 25?

Thank you for your time.

RS Dorasamy

APPENDIX C

SEMI-STRUCTURED INTERVIEW

- 1 What aspect of professional development do you consider important for the development of EMS educators in your school?
- 2 What strategies do you use to provide subject knowledge and relevant support to EMS educators?
- 3 What are your development needs to capacitate you in providing relevant support to the EMS educators?
- 4 What are some of the challenges facing you as the head of department in managing the EMS curriculum?
- 5 How are you addressing the challenges identified?

Thank you for your time