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evaluation

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## DECLARATION

**I, Muziwenhlanhla Michael Ngobese, hereby declare that this dissertation represents my own work in conception and execution, and I have also acknowledged all the resources that I have used by means of complete references.**

**Signed by me ..... on the .....day of December 2009 at  
.....**

## ABSTRACT

This study primarily looked at teachers' experiences of the IQMS evaluation and its impact on their professional development. IQMS has been actively introduced at the school system for the past five years. The purpose of this study is two fold. Firstly, this study wants to explore the outcomes of IQMS within the school context with a specific focus on outcomes relates to teachers. Secondly, this study wants to document the experience of schools' trip through the IQMS process from the perspectives of teachers and the school managers.

A survey methodology was used to produce the data together with the analysis thereof. Some of the key findings from this study reveal that:

- Teachers with lower teaching qualifications and teaching experiences perceived IQMS to be beneficial to them, while teachers with higher qualifications and longer teaching experiences were suspicious of the IQMS process.
- Younger teachers tend to have more positive feelings towards IQMS while older teachers tend to have negative feelings towards IQMS. On the other hand middle aged teachers tend to have mixed feelings towards IQMS.
- The IQMS evaluation report had a positive impact on teachers in general, in terms of them identifying a need to develop themselves.

Some of the key recommendations in relation to this study are:

- The Department of Education should ensure that sufficient workshops and trainings are properly planned and provision is made for in service training of teachers.

- Quality education can only be possible if the Department of Education ensures that all schools are well resourced.

## **ABBREVIATIONS AND ACRONYMS USED IN THE STUDY**

IQMS- Integrated Quality Management System

DSG- Development Support Group

SDT- Staff Development Team

SMT- School Management Team

## **TABLE OF CONTENTS**

### **CHAPTER 1**

#### **ORIENTATION**

1.1 INTRODUCTIION.....	1 - 4
1.2 IQMS as a system of school evaluation.....	4 - 6
1.3 PURPOSE OF THE STUDY.....	6
1.4 CRITICAL QUESTIONS.....	6
Brief history of the education system in South Africa.....	6 - 9
1.5 RATIONALE.....	9
1.6 CONTEXTUALIZING IQMS.....	9 - 11
1.7 RESEARCH METHODOLOGY.....	11-12
1.8 Literature review supporting the need for the need for the study.....	12-13
1.9 CONCLUDING REMARKS.....	13
1.10 CHAPTER SUMMARY.....	14

### **CHAPTER 2**

#### **LITERATURE REVIEW**

2.1 INTRODUCTION.....	15
2.2 A history of the Evaluation System in South Africa.....	15-18
2.2.1 What is IQMS? .....	18-19
2.2.2 Expectation.....	20
2.2.3 Current critique of the system (IQMS).....	20-21
2.3 A historical account of the different evaluation systems .....	22-23
2.3.1The “New Appraisal” system for Teachers in South African context.....	24
2.3.2 Processes and procedures that are to be followed during the Teacher	

Evaluation Exercise.....	25-26
2.4 Guiding principles of the IQMS.....	26-27
2.5 A global perspective of teacher appraisal.....	27
2.5.1 International Context.....	27-29
2.5.2.1 The main reasons for the implementation of the USA system of evaluation.....	30
2.6 The UK system of teacher evaluation.....	31
2.6.1 The main reasons for the implementation of the UK system of evaluation....	31-32
2.7 African Countries System of Evaluation.....	32-34
2.7.1 The main reasons for implementing Africa's system of evaluation.....	35
2.8 Theoretical and Conceptual Frameworks.....	36-41
2.9 Current Research done on quality education in South African Schools.....	42-45
2.10 CHAPTER SUMMARY.....	45
2.11 CONCLUSION.....	46

## **CHAPTER 3**

### **RESEARCH METHODOLOGY**

3.1 Introduction.....	46
3.2 Methodology employed in the study.....	46-47
3.3 Delimits of the study and sampling process .....	47-48
3.4 Research instrument used in the study.....	49-52
3.5 Ethical Issues.....	52-53
3.6 Validity and Reliability .....	53
3.6.1 Validity.....	53-54
3.6.2 Reliability.....	54

3.7 Critique of the methodology.....	55
3.8 CONCLUSION.....	55-56

## **CHAPTER 4**

### **ANALYSIS AND INTERPRETATIO OF DATA**

4.1 Introduction.....	57-58
4.2 SECTION A: Teachers' perceptions on the IQMS policy.....	58
4.2.1. Relationship between teaching qualification, teaching experience and Perceived benefits of IQMS.....	58
4.2.2. Relationship between teachers' ages and their perceived feelings towards IQMS.....	59
4.2.3. Relationship between school resources and perceived teachers' preparation For IQMS.....	60
4.3 SECTIONB: Teachers' experiences of implementing IQMS .....	63-67
4.4 SECTION C: The impact of the IQMS process and evaluation report on teachers.....	67-71
4.5 SECTION D: School managers' views of the IQMS process.....	71-74
4.6 CONCLUDING REMARKS.....	74
4.7 CHAPTER SUMMARY.....	75

## **CHAPTER 5**

### **SUMMARY OF FINDINGS, CONCLUSION AND RECOMMANDATIONS**

5.1 INTRODUCTION.....	76
5.2 SUMMARY OF KEY FINDINGS.....	76-77

5.3 RECOMMENDATIONS..... 77-78

5.4 CONCLUSION..... 78

BIBLIOGRAPHY..... 79-83

APPENDICES..... 84

# CHAPTER 1

## 1.1 Introduction:

School evaluation systems are part of the accountability regimes that have been put into place for most systems of the government. The current School evaluation system, in the form of Integrated Quality Management System (IQMS), has been through several layers of changes through its developmental stages. The IQMS has systemic and personal foci that attempts to make the school education system more efficient. This study is, therefore, an attempt at exploring teachers experiences of IQMS post their evaluations.

This chapter, therefore, provides a rationale for the need for this study through an articulation of the research focus and questions, a rationale and a literature that attempts to make a case for the need to do this study. Amongst other things this chapter will attempt to interrogate the education system within the South African context in terms of teacher evaluation using Integrated Quality Management System (IQMS) as means of addressing the issue of quality in education. This chapter presents the purpose of the study, critical questions, and significance of the study and finally how the rest of the study will be structured.

There seems to be a multipronged approach to addressing quality in education by the Department of Education, the public, the organized bodies (e.g. teacher unions) and research units. Among this is a public outcry which raises concerns about the education system, the changing goals of quality which make it difficult to meet performativity goals, a commitment by stakeholders for providing quality education and the set of structures and processes to ensure quality provisioning.

According to Horwitz (1990:12) cited by Mthethwa (2004:101) quality refers to the requirements that customers expect from a product or service. In this study, quality education will refer to the provision of quality teaching and learning by the school in accordance with the public expectations. The South African public's expectation is that, quality education needs to examine education provision critically to ensure that it is

relevant and appropriate to the needs of the youth (Galant, 2006:12). In addressing the concerns raised by the public about the quality of education, the National Department of Education formulated and introduced quality assurance interventions in the education sector, and these interventions were in the form of policies. The policies were meant to transform the education system and addressed the issues of quality education at schools and the imbalances created by the apartheid regime. As means of introducing quality and evaluating quality in education, several policies had been developed over time culminating in the introduction of a composite evaluation system, the IQMS.

The first policy that was formulated by the government related to the personal development of teachers and this was formalized into Developmental Appraisal System (DAS). The Department of Education had identified teacher appraisal as one of the central activities of addressing quality to the South African society (Mothata, 2005:213). The major aim of teacher appraisal was to develop teachers in order to improve their delivery in schools (Department of Education, 1998:51). Bell (1992:126-127) argues that appraisal has a part to play in making educators accountable to parents for the education of their children. It also affords parents a further assurance of quality of teaching their children receive. Goddard and Emerson (1995:11) further argue that the cornerstone of appraisal is a belief that educators wish to improve their performance in order to enhance the education of students.

The second policy formulated by the state as, custodians of the education system, was directed at the efficiency of the school. This policy process translated into the Whole School Evaluation (WSE) system. Whole School Evaluation (WSE) was to look at the efficiency of the school to offer what the institution was supposed to be doing and to recognize what the efficiencies were in offering an efficient service, WSE was needed to be done to developmental planner in obtaining efficiency. Schools, like all public organizations, are however being called upon to be accountable. Whitaker (1998:106) maintains that "issues of accountability are never far from our minds these days and it is vital to be clear about our responsibilities to share information and explanations with those who are concerned with the school". Teacher appraisal as described above is an

intervention which aims to benefit both the individual and the school in pursuit of quality education. According to Poster and Poster (1992:2), “appraisal is one of a number of techniques for integrating the individual into the organization”. In other words, it helps harness the unique talents of individuals and co-ordinates their activities towards the achievement of the organization’s objectives by efficient and effective means. Evaluating the effectiveness of the system encompasses a broad scope, including the perceptions of those appraised.

Considering the above, one should , however, realize that quality education can only be accomplished by means of an appraisal system that is based on the improvement of individual performance, which in turn leads to the improved working relationships and development of the individual’s career (Everard, 1996:79). But the question that arises is, whether teachers really view appraisal in this light.

Furthermore, the government has acknowledged that education and training have the central activity of addressing quality in South African society (Mothata, 2005). In August 2005, the Minister of Education, Naledi Pandor argued, that the quest for the improvement of quality in education has been recognized as one of the most significant challenges facing the South African government(Department of Education, 2005). She further stated that, improving the quality of education was critical in ensuring that the learning needs of the disadvantaged society were met and there was a need to provide pathways for families and communities in poverty. In pursuance of this goal, the Minister of Education resolved to campaign for the following, (Department of Education, 2005:122):

- 1 A National Education Evaluation and Development due to begin operating in 2009, a new inspection body that will revive the school inspectorate which will be central to accountability and quality.
- 2 The Quality Pledge which encourages quality in schools. Quality Pledge is an initiative based on how schools can prove their commitment to excellence.

On the other hand in contributing towards addressing the challenge of quality in

education , the HSRC (Human Science Research Council) established the Centre for Education Quality Improvement (CEQI) in 2006 (Kanjee, 2005). According to Kanjee, the primary purpose of CEQI is to support the government and other key role players like: teachers, parents, learners, donors, and Non Governmental Organizations (NGOs) to enhance decision- making processes for implementing relevant and effective strategies to improve education quality at all levels of the system.

For the Department of Education in ensuring that quality education is achieved and addressed, the policy on Integrated Quality Management (IQMS) was established for this purpose. Through its vision on Quality Assurance, the Department of Education (2005: 1) clearly states that, it is going to ensure quality public education through monitoring and improving

- 1 The quality of learning and teaching and
- 2 The processes of educator development.

## **1. 2 IQMS as a system of school evaluation**

The main assumption underpinning this study is that Integrated Quality Management System (IQMS) policy intentions is to ensure quality public education through evaluating and developing teachers as means of addressing the poor quality of teaching and learning in South Africa. Mayatula (2006:1) feels that the development and performance of teachers needed to be separated and dealt with by two different systems. He argues that in the process of integration, teacher development may be compromised. Mncwabe (2007:6) citing Bhengu (1999) agrees that IQMS as an instrument is good for accountability and not for development. He argues that, as IQMS is linked to remuneration, it stands to reason that the system might be manipulated and same mistakes would be made as in the past. Hence quality might be compromised. On the same issue Hindle (2006) complains about the fact that during the evaluation process, the panel which is known as the Developmental Support Group (DSG) would score the evaluatee good high points that does not match the actual performance.

On the other hand Steyn (2006:427) argues that, the literature on teacher appraisal shows that it can be very complex, involving a number of factors that can either impede or support teacher effectiveness. Steyn identifies three main purposes of appraisal as follows: to serve as a basis for modifying behaviour to realize more effective working habits; to provide adequate feedback to evaluate each employee on his/her performance; and to provide managers with data to evaluate future assignments and determine compensation. The feedback provided during the evaluation process is vital to informing the teacher who is evaluated, what ought to be done to map the way forward. This will improve the effectiveness of teaching and learning and ultimately, the quality of education (Abraham, 2001:1).

Since the introduction of teacher evaluation using IQMS in South African schools, specifically for pay and promotion purposes different opinions have come out. Patel (2006:5) suggested that in order to strengthen supervisory roles and performance, an outside agency be used to assess teachers for promotion or remuneration. He argued that if teachers felt that they were worthy of an increase, they should be able to ask an outside agency to come and evaluate them for this. The Teacher (October, 2008) challenges the South African Democratic Teachers' Union (SADTU) boss Thulas Nxesi on the perception that the union shields members at the expense of education. The South African Democratic Teachers' Union has objected to the National Education Evaluation and Development Unit, a new inspection body due to start operating in 2009. The question that comes to the fore is: What are teachers' perceptions of the current system of teacher evaluation called (IQMS) as practiced in their schools?

This study will check what teachers say about IQMS, whether or not it serves the purpose it was created for through the teachers own voices. To address this question it was imperative to look at the historical background of education in South Africa.

### **1.3 Purpose of the study**

IQMS has been actively introduced at the school system for the last five years. What have we learnt from this form of assessment? The purpose of this study is three fold.

Firstly, this study wants to explore the outcome of IQMS within the school context with a specific focus on teachers. Secondly, this study wants to explore the teachers' experiences of IQMS post evaluation. Thirdly, this study also wants to explore the school managers' experiences with regard to IQMS and its implementation in schools.

#### **1.4 Critical Questions**

This study is guided by the following critical questions:

- 1 What are teachers' perceptions of IQMS?
- 2 What are teachers' experiences of being evaluated through the IQMS?
- 3 What are school managers' experiences of facilitating the IQMS evaluation process in their schools?
- 4 How did the evaluation process of the IQMS impact on teachers' professional development?

#### **Brief history of the education system in South Africa**

The history of education system in South Africa dates back to the apartheid period, prior to 1994.

Under the apartheid government there were separate education departments for different races, with Africans being at the bottom of the ladder in terms of the provision of resources. Schools in townships and other black areas were poorly resourced and different syllabi applied to various groups. The challenge faced by the democratic government was to create a system that would fulfill the vision of opening the doors of learning and quality education for all (Diphofa, 1998).

According to Diphofa (1998), the paramount task was to build a just and equitable system which provides good quality education and training to young and older learners throughout the country. To achieve this, the Department of Education published a number of policy documents with the aim of restructuring the education system in order to bring about quality and equity. The South African Schools Act is very pertinent to issues of educational transformation, together with other numerous policy initiatives

including the Bill of Rights from the Constitution -Act No 108 of 1996. Act 108 of 1996 acknowledges that South Africa requires a new system of schooling, which will provide an education of progressively high quality to all South African (Department of Education, 2001). However, in attempting to manage the just and equitable system to provide a good quality education, a division of management of the education system was established which falls within the Provincial system of division. This system of division brings about a new set of challenges that compromises the movement towards a fully fledged National system of education. For example, the minister has suggested that an outside structure be used to do assessment. This would be a national body while provinces would be responsible for development. This would be a challenge for the national department to work on. Also in two problematic provinces, namely: Limpopo and Eastern Cape where labour problems had been difficult to sort out the provincial governments were not doing what they were supposed to do.

In June 1999, the Ministry of Education presented a report to the incoming Minister of Education following the second democratic general election of that year. The status 'report', as it was called, was a compact yet informative review of the transformation of education as means of providing quality educations. For the purpose of this section, I will discuss two critical issues which are touched upon in the report; these critical issues are as follows:

- (i) Five years of change and
- (ii) The transformation of learning opportunities (Department of Education, 1999).

When the Ministry of Education identified the years between 1994 and 1999 as years of change, it was in recognition of certain achievements which are outlined by Manganyi (2001):

- 1 The complex disestablishment of nineteen apartheid education departments was initiated and completed.
- 2 The pre-1994 education dispensation was replaced by a unitary, non racial system of provincial education management and administration.

- 3 The nine provincial departments together with the national department started the complex task of functioning as a single national system of education and training.

One of the earliest tasks of the first democratic government on the issue of addressing quality was the building of a national platform for a system of education that integrated both education and training. Some of the land mark developments associated with the South African Schools Act was the introduction of compulsory school attendance for all children between the ages of six and fifteen as well as the establishment of elected and representative school governing bodies in public schools throughout the country. Without regard to race, class and religion, South African children and university students were brought under “one roof”. These changes in the school and higher education sectors were brought in compliance with the provisions of the South African Schools Act of 1996, the further Education and Training Act of 1998 and the Higher Education Act of 1997.

As the momentum towards democracy gained ground in the early 1990s with the unbanning of political parties and return of exiles, the newly-formed South African Democratic Teachers Union in South Africa began an internal process of participatory research, discussion and mobilization around new forms of teacher appraisal for a democratic South Africa. What emerged from this process was an approach to teacher appraisal that rejected a bureaucratic, judgmental process which translated into a policy on Developmental Appraisal System (Chetty, 1993). Developmental Appraisal System (DAS) came into being on 28 July 1998 (Resolution of 1998) as a way of establishing efficiency level at the personal level of teachers.

Whole School Evaluation (WSE) was introduced as a way of looking at the efficiency at a school level namely; the overall effectiveness of a school as well as the quality of teaching and learning. In 2003 an agreement between teacher unions and the employer namely the Department of Education in the Education Labour Relations Council led to

the introduction of the Integrated Quality Management System. It integrated the Developmental Appraisal System, the Performance Measurement System that was agreed to on 10 April 2003 (Resolution 1 of 2003) and Whole School Evaluation.

### **1.5 Rationale for the study**

As the principal of the school and being tasked with the responsibility of implementing policies at school, this study will assist and allow me to prepare my staff and the school for evaluation and to meet the challenges set by IQMS. This study attempts to explore the effects of the new policy of teacher evaluation called IQMS, in terms of the teachers' expectations, experiences and fears and to find out whether this policy on teacher evaluation does or does not in addressing the issue of quality in education as intended by its developers.

### **1.6 Contextualizing IQMS**

This section will attempt to contextualize Integrated Quality Management System (IQMS) in terms of addressing quality within the South African context. A historic account of how IQMS as a new system of teacher evaluation came about will be provided in this section.

For more than two decades in South Africa, especially in black schools, teachers were not subjected to any kind of evaluation as outlined in the Report to the Portfolio Committee on Integrated Quality Management System (IQMS) the of June 2006. According to this report, the requirements of quality public education have changed in the last ten years and schools as well as education managers at all levels of the system are required to respond to the heightened expectations of parents and the society. The classroom teacher is the nucleus in the process of educating a child. Therefore, a performance based teacher evaluation system is critical to improving teaching and learning (Ramnarain, 2001:97). Therefore, the performance of educators is significant in increased learner achievement. Believing that if teachers are of high quality and are highly motivated, highly developed and highly supported, then learners of high quality

will be produced, hence the education will be of a high quality (Report to the Portfolio Committee on Integrated Quality Management System, 2006). The policy on IQMS was therefore crafted as a mechanism of addressing quality in education. The IQMS provides information and feedback to teachers regarding effective practice and offers a pathway for individual teacher for the professional growth.

IQMS integrated three programmes, namely; Developmental Appraisal System (DAS), Performance Measurement System (PMS) and the Whole School Evaluation (WSE) (ELRC, 2003).

In 2004, teachers and schools were to begin advocacy and training; staff development teams were established so as to coordinate and monitor the individual teacher appraisal process and to also draft a School Improvement Plan. By March of 2005, all Staff Development Teams were to receive the completed instruments and ratings as well as Personal Growth Plans. The idea of performance management as means of evaluating teachers for salary progression, grade progression, affirmation of appointments, rewards and incentives was introduced alongside the National Qualification Framework and broad-banding . Staff Development Teams needed to compile the School Improvement Plan and liaise with the regional, district or area offices which would then start developing an Improvement Plan with the information from schools about their INSET needs, observation of educators and provide feedback.

During the second cycle, the regional, district or area office conducts educator observation for the purposes of pay or grade progression. This summative evaluation is seen as the validation of earlier evaluations. The Staff Development Team is required to keep all the records, compile a report for Whole School Evaluation purposes with the principal and submit this report to the Provincial Department reflecting the progress made in schools. This report must then be submitted to the regional offices by the time schools close for the year. Whole School Evaluation would occur either in the first or second year post the submission of the report. This evaluation is to be external and is managed by the principal and either the regional, district or area office. A sample of

educators is evaluated, a protocol is to be observed in the process and there is to be discussion and feedback.

This study attempts to capture an understanding of the experiences the teachers have in terms of their evaluation using IQMS as a tool in addressing quality education at their schools.

### **1.7 Research Methodology**

This section will give a brief discussion of the research methodology that underpins the study. A detailed account of the methodology will be found in chapter 3.

In this study on teachers' experiences after evaluation using IQMS as a tool, both the quantitative and qualitative approaches were used. The quantitative approach involved a questionnaire survey, because it gathers data at a particular time with the intention of describing the nature of existing conditions (Cohen & Manion, 1995: 83). On the other hand Eksteen (2003: 195) argues that a qualitative approach has the potential to supplement and re-orient our current understanding of teacher appraisal complexity. A literature study available and involving Teacher Appraisal will be undertaken. Interviews and the questionnaire will form the basis for discussion between the researcher and the participants.

### **1.8 Literature Review supporting the need for the study**

This section focuses on the studies that were conducted in South Africa on Teacher Appraisal in quality assurance and quality promotion. Also this section will attempt to justify why this study is needed.

In the study conducted by Mncwabe in 2007 on Teacher Appraisal entitled "The

implementation of Integrated Quality Management System in Schools: Experiences from Mayville Ward”, the author examines only the implementation part of the evaluation system particularly from a principal’s perspective. The issue on how quality in education was to be ensured is neglected. His findings show that IQMS was not properly implemented and this study is only based in the Mayville ward where the researcher is working as a principal. Quality as well as biasness in this study is not addressed. The researcher only focused on the implementation process and excluded real people whom I think were going to be affected somehow if the implementation was not properly done, namely the teachers who were to be evaluated. My study is focusing on quality as the main theme in teacher appraisal.

The second literature that I would like to look at is entitled “The role of principals in the promotion of total quality management” conducted by Mthethwa in 2004. Her focus as with the previous author was on the principal’s role in as far as ensuring total quality management at schools. The following are some of her findings, which through my review motivated me to undertake my study.

- 1 Principals should establish quality teams
- 2 Principals should delegate management duties to the staff

When I was analyzing the above findings, I discovered that the researcher did not explain how specifically these two findings were going to address the issue of quality education. Another gap that I have noticed is that, all of the above studies reviewed do not say anything about the issue of post evaluation. Both studies are silent when it comes to the issue of the purpose of the instruments they were investigating, whether the instruments they were researching about did serve or did not serve the purpose of the system satisfactory. Lastly, I feel that both studies were only targeting the principals who were supposed to implement the programmes; teachers who were supposed to drive and be affected by the programme were neglected and excluded from the design of both studies. Hence, the purpose of this study is to explore IQMS through the lens of the teachers. I then decided to conduct a study that will address the gaps that the above studies did not address.

## **1.9 Concluding Remarks**

Chapter 1 gave an account of the background of the study, the reason why the researcher decided to conduct this study. This chapter also talks about the critical questions that are guiding this study, the rationale for layout of the entire study was presented.

## **1.10 Chapter summary**

All of these above mentioned issues seem to be central in providing quality education. This chapter also looks at how these issues of quality are being promoted and also realized in the context of schools. This study hopes to present an insight to this question.

The next chapters will cover the following:

- Chapter 2 focuses on a review of literature on Teacher appraisal globally. It attempts to provide a historical account of how Teacher appraisal emerged and changed over the years.
- Chapter 3 presents the research methodology of the study. This chapter also gives an account on how data was collected. Furthermore, plans of defining and choosing the sample will be discussed.
- Chapter 4 presents the analysis of the data collected.
- Chapter 5 concludes the thesis.

## Chapter 2

### LITERATURE REVIEW

**2.1 Introduction:** This chapter focuses on the review of literature on Teacher Appraisal globally. It attempts to provide an historical account of how Teacher Appraisal emerged and has changed over the years.

This study examines how Integrated Quality Management System (IQMS), as one of the quality assurance initiatives, attempts to contribute in ensuring quality education in South African schools. This study will further explore the teachers' feelings, perceptions, expectations as well as their experiences after going through the evaluation processes using IQMS as the evaluation tool. The rationale for this literature is to understand the current thinking and trends in quality assurance and quality promotion. The chapter begins with the description of the current South African evaluation system in general. This discussion will address the issues of quality education in relation to the current teacher evaluation system called IQMS. It will be guided by the following questions: What is this current system? What is its purpose? What are the expectations regarding this new evaluation system and finally the current critiques of this system. The chapter concludes with an historical account of how this system emanated.

### 2.2 A History of the Evaluation System in South Africa

Prior to 1994, the evaluation of teachers focused mainly on fault finding. It was a one sided process dwelling only on identifying the weaknesses of teachers. The element of Teacher Development was never a focal point. After the democratic government took over in 1994, the new evaluation system came into being. The new system has a developmental purpose. In terms of that, the three systems which were introduced namely Developmental Appraisal System (DAS), then Performance Measurement System and Whole School Evaluation System (WSE) needed to be altered. There was a need to integrate all these systems for the purpose of developing and improving the quality of education. The next discussion attempts to examine these three systems and their purposes.

### **Developmental Appraisal System (DAS)**

The Developmental Appraisal System (DAS) policy was developed as a result of the wide changes that were occurring in the South African education system. It was a means of introducing and evaluating quality in education. The DAS policy rested on the personal development of an individual educator for the purpose of improving the quality of education in schools (Chisholm, 2005).

Developmental Appraisal System (DAS) is the teacher appraisal system that was developed by the Department of Education in 1998 with a view to determining areas of strengths and weakness, and to draw up programmes for individual development (ELRC, 2003). Chisholm (2005:70) argues that DAS was intended to help individual educators with professional development, to review current practices and performance, to structure ways to improve these practices and performances, to set a specific achievable target and to identify training and support.

### **Performance Measurement System**

Performance Measurement System policy was introduced as a way and means of evaluating the individual teacher for salary progression, grade progression, affirmation of appointments, rewards and incentives (ELRC, 2003). The Performance Measurement System (PMS) essentially refers to managing poor performance and rewarding good performance in an open, fair and objective manner.

Democracy, transparency and development underpinned the Performance Measurement evaluation policy (Department of Education, 2003). The principal and the School Management Team (SMT) should begin the process by organizing a workshop that will explain it to all staff members. At the workshop, the principal and the SMT will draw a management plan taking into consideration the inputs made by the staff members. The principal together with the SMT will then implement the management plan and monitor the evaluation process. The principal will ensure that the evaluation reports are constructed and filed.

The Department of Education (2003:3) provides the most important features of the performance measurement evaluation processes. They are as follows:

- Lesson planning, preparation and management.
- Creation of learning environment and classroom management.
- Monitoring and assessment of learners.
- Professional development in the field of career and participation in professional bodies.
- Human relations and contribution to the school development.
- Knowledge of the curriculum and subject matter.
- Leadership, communication and servicing the Governing Body.
- Extra curricular and co-curricular participation.
- Administration.
- Personnel.
- Decision making and accountability.
- Strategic planning, financial planning and education management.

The basic principles that guide this programme include quality, equity, efficiency, sustainability, partnership, capacity, relevancy and flexibility. The next discussion will attempt to describe and draw from the literature with regard to the Whole School Evaluation (WSE).

### **Whole School Evaluation (WSE)**

The introduction of Whole School Evaluation (WSE) in 2001 should be viewed within the broader context of transforming the education system in order to enhance the level of performance of schools. Whole School Evaluation is defined by Van Niekerk (2003:165) cited in Mncwabe (2008:163) "as a collaborative, transparent process of making judgments on a holistic performance of the school that is measured against agreed national criteria". This definition is reinforced by Epochs (2001:8) who states that Whole School Evaluation System (WSE) is defined as "a cornerstone of quality assurance enabling schools to provide an account of its performance and how it meets the national goals and needs of the public". On the other hand Faulkner (2000:9) argues that Whole School Evaluation System was introduced as

means of evaluating the overall effectiveness of a school as well as the quality of teaching and learning”. Davidoff (2001:178) further argues that “Whole School Evaluation System assesses the conditions of teaching and learning in a particular school”.

The Department of Education (2002) emphasizes the main aim of the Whole School Evaluation as a way to facilitate the improvement of the school performance through approaches of partnership, collaboration, mentoring and guidance. Furthermore the Department of Education (2002) stipulates that, Whole School Evaluation System policy provides a legislative framework through which schools would be evaluated. The Department of Education in SA instituted the Whole School Evaluation (WSE) and the Systematic Evaluation (SE) directorates to evaluate the performance of the school and the system respectively. The purpose of Whole School Evaluation System (WSE) is to evaluate the overall effectiveness of a school as well as the quality of teaching and learning including the support provided by the District, school management, and infrastructure and learning resources (IQMS Training Manual, 2004).

Lastly, according to the National Education Policy Act 27 of 1996, the Minister of Education should monitor and evaluate education provision annually in compliance with the Constitution of South Africa.

The next discussion presents the new evaluation system. Among other things this discussion addresses two fundamental questions in connection with this new system, namely: what is this new system called and for what purpose was it developed?

### **2.2.1 What is IQMS?**

IQMS is an abbreviation for Integrated Quality Management System which consists of three programmes that are aimed at enhancing and monitoring performance in the education system. IQMS, as stated before, integrates three programmes, namely: Developmental Appraisal System (DAS), Performance Measurement System (PMS) and the Whole School Evaluation System (WSE) (Resolution 8 of 2003). IQMS is informed by Schedule 1 of the Employment of Educators (EEA), No. 76 of 1998 where the Minister is required to determine performance standards for educators in terms of which their performance will be evaluated. These three programmes are implemented in an integrated way in order to ensure optimal effectiveness and co-ordination to improve the quality of teaching and learning in schools (IQMS Training Manual, 2004). IQMS was introduced with the aim of improving the quality of

education in schools, not to replace quality assurance but rather to strengthen its policies and principles (Department of Education, 200 1b:30).

Integrated Quality Management System (IQMS) is described as an intervention which aims to benefit both the individual and the school in pursuit of quality education (Painter, 2005:58). (Sharing the same sentiment is Hariparsad's (2008:1) definition that IQMS is "a process of management which entails improving the organization's performance through the enhanced performance of individuals"). Furthermore, IQMS is viewed as an appropriate way to lead to an improved relationship between remuneration, responsibilities and performance (Mncwabe, 2007:50). For the purpose of this study, IQMS is viewed as one of those interventions consisting of professional development, in-service training and career planning, which aim at developing the teacher's knowledge, skills and confidence for the sake of improved performance (Steyn, 2006:427).

### **The rationale and intended implementation of IQMS**

IQMS was mainly crafted for the purpose of developing and improving the quality of education (Chisholm, 2005:25). Below are some of the aims and intentions of IQMS as outlined in the Training Manual for IQMS (2004, Section A: 3)

- To identify the needs of educators, schools and district offices for the support and development;
- To provide support for continued growth;
- To promote accountability;
- To monitor an institution's overall effectiveness; and
- To evaluate an educator's performance.

The following section discusses the expected programme that was supposed to take off during the implementation phase of the IQMS.

### **2.2.2 Expectation**

According to Chisholm (2005:25) in 2004 schools and teachers were expected to begin with both the processes of individual teacher appraisal and the Whole School Evaluation. Teachers and schools were to begin advocacy and training. Staff development teams were to be established for the purpose of coordinating and monitoring the individual teacher appraisal process and then draft a School Improvement Plan (SIP) and there after a plan for implementation.

By 2005, all Staff Development Teams (SDTs) in schools were to receive the completed instrument and ratings as well as Personal Growth Plans from the Provincial Education Department Offices. From the Personal Growth Plans, schools were to compile the School Improvement Plans and liaise with either the regional or district offices. The regional or district offices were to start developing an improvement plan with the information from schools about their INSET needs and provide feedback to the teachers through the Staff Development Teams of that particular school (Chisholm, 2005:24).

The following discussion presents a critique of the Integrated Quality Management System (IQMS) as seen by different researchers.

### **2.2.3 Current critique of the system (IQMS)**

According to Chisholm (2005:27), implementation had hardly begun in 2005 when conflicts emerged between teacher unions and the Department of Education over the role of the Department. Both the survey and case studies conducted by Chisholm revealed that class size was found to be a highly significant factor. What the evidence suggests is that the requirements of teaching and administration are simply overwhelming for educators with large classes. One of her finding reveals that more than 75% teachers felt that IQMS had increased their workload.

At the same time teachers highlighted that the department had been ill-prepared and the system had been hastily introduced. Time constraints also posed a problem with there being too many disruptions at schools as teachers had to leave their classes to evaluate others.

A central finding of the study conducted by Chisholm into teacher's workload from both the survey and case study components also revealed that some schools mainly from former white areas were better able to respond to IQMS requirements than others from the former black schools. QUALIFY WHY!

Kamper (2006:430) feels that, the purpose of the IQMS is primarily to assess objectively the performance of the teacher for developmental purposes in order to improve his/her delivery in a particular school. He argues that, however if IQMS is used mainly to determine salary progression, grade progression and affirmation of appointment then teachers will become shy and defiant about exposing their weaknesses.

On the other hand Mncwabe (2007:8) believes that IQMS as an instrument for teacher evaluation should not be used as both a development strategy and an accountability strategy. He argues that, IQMS as a development strategy is based on the belief that teachers wish to improve their performance in order to enhance the students' learning. According to him, the key characteristic of this strategy is negotiation and the philosophy underpinning it is the support of teaching and managerial development. On the issue of IQMS as an accountability strategy, he argues that the key characteristic of this strategy has been seen as imposition since the philosophy is the checking of teacher's competence. According to him, the accountability strategy fosters defensiveness on the part of teachers as this strategy provides the evidence base for disciplinary procedures.

Considering the above critique by different researchers one should, however realize that quality education can be accomplished by means of an appraisal system that is based on the improvement of the individual's performance, which in turn leads to improved working relationships and development of the individual's career (Murdock ,2000:52). Individual performance can be enhanced through the identification of one's strengths and weaknesses, a key purpose of IQMS. But the question that arises is whether teachers that have gone through the evaluation process using IQMS view appraisal in this light. Therefore, the researcher strongly believes that, evaluating the effectiveness of the system rests on many caveats including the perceptions of those appraised. The next sub-topic presents a brief history of the evaluation system in South Africa.

### **2.3. A Historical Account of the Different Evaluation Systems**

The history of teacher evaluation in South Africa dates back to the apartheid era. As a result of the legacy of apartheid in South Africa, many schools were providing education of poor quality (Steyn,2001:103).Immediately after the democratic government took over in 1994, the South African government realized that education at that time did not adequately reflect the social, cultural and economical aspirations of the South African society (Ngwenya, 2003:82). Changing from an autocratic to a democratic South Africa also called for a change in the education system which demanded a transformation in the evaluation of the teachers (Hayward, 2001:104). According to Faulkner (2000:9) a change called for an end to punitive and judgmental approaches when evaluating teachers, and beginning of new approaches that were supportive and developmental.

Mncwabe (2007: 16) stipulates that provision was made by the Department of Education with the introduction of Quality Assurance policies for equity and redress to eliminate the imbalances of the past. One of quality assurance initiatives created for the purpose of developing, monitoring and improving the quality of education was a new system of evaluation called Integrated Quality Management System (Hariparsad, 2008:1). Ngwenya (2001:23) cited by Cele (2008:21) concurs with Hariparsad by stating that IQMS policy is focusing on monitoring and evaluating an achievement, on programme and service reviews, quality audits and accreditation. The purposes of accreditation (Department of Education, 2001: 34) are said to be:

- To force excellence in education.
- To develop criteria guidelines for assessing integrity.
- To encourage improvement through continuous self-study and planning and
- To provide support and assistance to developing schools

It is imperative at this point to chronicle the background and reasons that prompted the democratic government to follow the path that has been discussed above. The following discussion attempts to provide that background.

In South Africa, prior to 1994 during apartheid era, teacher evaluation was mainly used to confirm those on probation, for promotion and for next awards (South African National Education Policy SANEP-NATED, 1997:23). Evaluation was seen as a function of the inspection within the departmental structures

and very little focus was on the professional development of teachers. Reed (2004:65) pointed out that, previously quality was based on an individual's unstructured performance and the evaluation of teachers was carried out unsystematically.

High powered resistance to teacher appraisal by different teacher unions started when the evaluation system was used to pin point teachers on a fault-finding mission (Mokgalane, 1997:6) cited by Mthethwa (2004:1). Towards the end of 1980, in the context of widespread resistance against apartheid authorities in schools, inspectors and subject advisors were routinely and often violently cast out of African schools when they attempted to enter, and the teacher's blatantly refused any form of evaluation of themselves and their schools' work. The conflict was seen to contribute, to some degree, to the collapse of the culture of teaching and learning in black schools. Chetty (1993) cited by Cele (2008:3) confirmed that the evaluation system was seen as illegitimate during the apartheid era because of its unacceptability. Inspectors as evaluators often did not understand educators in a particular context because they came from different socio-economic and cultural backgrounds. Gounden (2000:123) as cited by Mthethwa (2004:46) highlighted the view that teachers and inspectors belonged to different race groups and cultures; each having different belief systems and possessing varied conceptions of how to teach. Where racial or cultural conflicts prevailed between teachers and inspectors there was often no common understanding between the two parties in respect of the aims and objectives of the evaluation process. After much deliberation and debates from all quarters of the education sectors there was a need to put a new appraisal system in place (Hariparsad 2008: 1-21).

In the early 1990s with the unbanning of political parties, the newly formed South African Democratic Teachers' Union (SADTU) began a process of participatory research, discussion and mobilization around a new form of teacher appraisal to inform its negotiations with existing departmental structures around the issue (Chisholm, 2005:50).

### **2.3.1 The “New Appraisal” system for Teachers in the South African context**

This section attempts to explain how the new teacher evaluation systems come into being through the process of negotiations in South Africa.

One of the main conferences held in 1994 after S.A. democratic election was an educational management and control conference (Swartz, 2004:155). According to Chisholm (2005), the main focus of the conference was on the essential elements of the new proposed system of appraisal, self evaluation, peer review, contextual factors and mediation in the event of conflict. Discussion also included a development plan for individual teachers linked turn to a more general school development plan.

After the first democratic elections, the bargaining and negotiating forum for all teachers namely the Education Labour Relations Council was created. The teacher unions and new departmental authorities added their voices to the bargaining forum (ELRC). The education system began to be reconstructed and the roles of both teachers and departmental personnel were to be redefined (Chisholm, 2005:6-49).

There was a need within the teaching profession to develop a negotiated appraisal instrument that would be acceptable to all stake holders. By 1993 the teacher unions and the department of education were involved in major discussions and debates which sought to address the main and basic principles, processes and clear procedures for the appraisal system. Nkosi (2007:189) citing Gounden (2000) confirms that during the month of October 1994, a conference was held at the ESKOM Centre in Midrand, Johannesburg by the Education Policy Unit of the University of the Witwatersrand. The conference focused on school management, teacher development and support for educators. Through the process of negotiations, the teacher unions together with the departmental authorities in the Education Labour Relations Council (ELRC) reached an agreement and saw a need to develop an appraisal system that was to develop teachers and improve the quality of education as well ( ELRC, 1998). In order for the agreement to be binding and respected by all parties, processes and procedures were formulated and had to be followed during the actual evaluation exercise.

The following discussion presents the agreed processes and procedures that were to be followed during the teacher evaluation exercise.

### **2.3.2 Processes and procedures that are to be followed during the Teacher Evaluation Exercise**

The Department of Education (2003:2) emphasized that an education professional should have fair access to all opportunities for development, support and career progress. The Department of Education (2003:3) provides the following steps that should be employed by the supervisor in the evaluation exercise of the educator:

1. A one on one meeting between the supervisor who should be the immediate senior and the teacher to be evaluated.
2. The educator who is to be evaluated should firstly do his/her self evaluation.
3. The supervisor then evaluates that particular educator.
4. Discussions take place between the supervisor and the educator.
5. Then the evaluation report will be compiled.
6. There will be a moderation by the SMT.
7. The signing of the evaluation report by all parties.

According to the Collective Agreement No 1 of 2003, the most important features of the performance measurement evaluation processes are as follows:

- Lesson planning, preparation and management.
- Creation of learning environment and classroom management.
- Monitoring and assessment of learners.
- Professional development in the field of career and participation in professional bodies.
- Human relations and contribution to the school development.
- Knowledge of the curriculum and subject matter.
- Leadership, communication and servicing the Governing Body.
- Extra curricular and co- curricular participation.
- Administration.

- Personnel.
- Decision making and accountability.
- Strategic planning, financial planning and education management.

## **2.4 Guiding principles of the Integrated Quality Management System (IQMS)**

Since 1994 several policies have been developed by the South African government to be implemented by the department of education as means of introducing quality education and also evaluating quality at schools.

Chisholm (2005) argues that by 2004, ten years after democracy, the South African Government had reasserted its authority through negotiations over the right to ensure that schools and teachers are evaluated. In contrast to the judgmental approach previously adopted during apartheid, IQMS is located in the developmental approach which is guided by democratic principles, which identifies the weaknesses of the school and educators with the view to improvement. This approach also acknowledges the strength of educators with an aim of further development (IQMS Training Manual, 2004). IQMS as the new South African model of evaluation takes its cue from the British system of evaluation which is characterized by its developmental aspect.

The SA Department of Education (2003) stipulates that IQMS is also guided by the following principles:

- ✚ The need to ensure fairness,
- ✚ The need to minimize subjectivity and
- ✚ The need to use the instrument professionally, uniformly and consistently.

Now that we have the Integrated Quality Management System (IQMS) and it has been implemented, the purpose of this study is to understand how it is unfolding at schools and on teachers because of IQMS?

The purpose of this study is to contribute towards this discourse.

Chisholm (2005:111) argues that IQMS's main objective is to ensure quality public education for all and the improvement of the quality of teaching and learning at school. Also, the Department of Education (2003c:10) clearly emphasizes the purpose of IQMS as that of facilitating the personal and professional development of educators in order to improve the quality of teaching and educational management. The KZN Department's Continuous Professional Development and Support Policy Framework (2003:125) are in agreement with the purpose of IQMS. This policy framework encapsulates a programme that consists of quality, equity, lifelong learning, sustainability, partnership and flexibility.

The principals have an overall responsibility to ensure that IQMS is implemented effectively and correctly in their schools. They have to provide copies to all educators of the IQMS document and are responsible for the training of educators (IQMS Training Manual, 2003c: 3-10). IQMS is supposed to lead to teacher development, and the question arises whether this system is serving the purpose it was created for?

The next section will attempt to look at the global perspective of school evaluation and teacher assessment.

## **2.5 A GLOBAL PERSPECTIVE OF TEACHER APPRAISAL**

This section will attempt to explain the different kinds of teacher appraisal systems and school evaluation strategies in other countries. The aim is to identify problems and challenges that might be similar or different to ours, and to find out how they overcame those problems and deal with their challenges. This study will also examine how teacher evaluation systems in other countries influenced our own system of teacher evaluation.

### **2.5.1 International Context**

In the following section three teacher evaluation systems found in the United States of America, Netherlands, United Kingdom and Mexico respectively are discussed.

According to Ngwenya (2003:22) citing Tovey (1994:86), the United States of America in the last decade had discussions around quality and continuity in education. These discussions focused on the need to

clarify who defines quality, why and with what goals. They stressed the economic determination of quality and a need to analyze practice irrespective of the pressures of time, a need for staff development and a need to accept the principle of lifelong learning.

Ngwenya (2006:24) citing Tovey (1994:88) argues that technical development on the basis of knowledge assure that education can no longer be restricted to a once only pre- career event. The author further argues that quality should be adhered to as means by which survival can be secured. Ngwenya says that a goal for continuous education is to provide quality review and not to destroy the initiatives .He presents five areas of practical action for education to continue. Firstly, one needs to examine new ideas with fellow staff. Secondly, there is a need for an input from those in the faculty to draw in a range of opinions. Thirdly, there is a need to include relevant people from the industries. Fourthly, evaluators should know who considers quality for this course. Lastly, there is a need for written guidelines (Tovey, 1994:77-91).

Ellett and Teddie (2003) cited by Mncwabe (2007:30), discuss a case study conducted in Netherlands. According to him, in the current development in the Netherlands, educational policies and practices are defined basically within its context. There are discussions on quality in higher education and the government wants to distance itself and place autonomy in the institutions themselves to work on their own mechanisms for quality. In an attempt to address the above initiative, a committee visiting the institutions is put in place whose role is said to be accountability and improvement (Don, 1994:114). According to Don, the committee acts as a councilor where it views the institutions as unique and takes the views, goals and aims of the institution as a means of stimulating self awareness of the institution. Secondly, the committee acts as a colleague to the institution. In this way it has to give collegial advice to improve quality of teaching. The committee further acts as an accountant, serving as an auditor, and scores the institution. It encourages views suggested by the institution and during the visit talks to internal and external people aiming to understand the functioning of the institution as a whole. At the end the committee will issue a well constructed and elaborative written report to the institution. The final report will help educators and principals of schools to manage quality assurance through the Integrated Quality Management System process that is in place in that school (Don, 1994:1-264).

Chisholm (2005:255) citing Don (1994:135) argued that in the USA measures to safeguard and stimulate quality in education are central at three levels. She mentions that at the first level is a need for an institution to build up its own quality assurance system. The second level is about a national agenda which will be responsible for quality matters on national level. Thirdly, there has to be a new performance

based funding system based on the number of students, amount of student achievement and quality components. The role of the government will be of a supervisor rather than of a controller. At the end quality assurance should be controlled at the institution level (Don, 1994:300).

According to Strydom (1997:255) cited by Mthethwa (2004:166), in Wales there is a great demand for accountability. Self evaluation and teamwork have been encouraged in an attempt to improve quality. Mthethwa (2004:170) citing Strydom (1997:340) stresses that there is a great need to meet the demands of accountability and to demonstrate the achievement of quality improvement in the students, staff experience and in their learning and working environment.

Another study conducted in Mexico points out that there is a connection between teacher performance, students' performance and quality assurance (Mncwabe, 2007:30). According to him, teacher's performance is measured against students' performance in simpler terms, the scores students get are compared to the teacher's scores. Parents are actively involved by contributing towards developing good learning habits and motivating students. In this way quality in education becomes a shared responsibility between teachers and parents. Merit pay systems have been around in Mexico and have been considered as an incentive for maintaining a quality of teaching and learning in schools (Mncwabe, 2007:31).

However, there has been a great recognition of diversity in teacher appraisal systems in promoting quality education in other parts of the United States of America. Ngwenya (2003:25) citing Strydom (1997:255) points out that, in Wales a great demand for accountability in the quality of education is the order of the day. Emphasis is on self evaluation and self assessment. Ngwenya (2003:26) commented as follows: "Self evaluation and teamwork have been encouraged in an attempt to achieve ownership of systems and the improvement of quality. There is a great need to meet the demands of accountability and to demonstrate the achievement of quality improvement in the students and staff experience in their learning and working environment."

The next section will attempt to give an account of why the United States of America's System of evaluation was implemented.

### **2.5.2.1 The main reasons for the implementation of the USA system of evaluation**

According to Vroeijenstijn (2004:80) citing Carron (1994) the main reasons for implementing systems of evaluations in the USA are as follows:

- Contract renewal and dismissals.
- Career and further development.
- Confirmation of teachers during the period of probation.
- Accountability to the public and local school community.
- Support and development.
- Classroom and lesson observations.
- Demotions and promotions.
- Curriculum delivery.
- Salary planning.

Turner and Clift (1988) cited by Rees (2003:15) argue that in USA the teacher is notified before hand of his/her appraisal. This is similar to the South African context since, the panel will notify the concerned teacher before hand about his/her evaluation during pre-evaluation discussion. Hopkins (1991) cited by Cele (2008:121) pointed out that in Italy the teacher evaluation committee is responsible for the development of all teachers. This is also similar to the South African context, since the Staff Development Team (SDT) coordinates all activities pertaining to staff development.

The above discussion suggests that in promoting and ensuring quality education, teacher evaluation and professional development should focus on assisting teachers to better their teaching practice .On the other hand the teacher has to teach so as to attain the set goals of education. Lastly, teacher reflection was promoted and was the main purpose of development; other contributing factors like contextual and social factors which might have a negative impact on teaching and learning and on promoting and ensuring quality education were strangely not considered.

## **2.6 The United Kingdom (UK) System of Teacher Evaluation**

Tovey (1994:76) cited by Mncwabe (2007:33) points out that, in United Kingdom schools there was no formalized consideration of quality therefore an Academic Audit Unit was introduced. The unit had to renew procedures used to secure academic standards as well as to assess the extent to which these reflect best practice. It was used to comment on good practice to universities at a national level and to review the role of the external examiners. The unit's role was also to examine mechanisms of quality assurance relating to teaching, communication, staff development and assessment in schools (Tovey, 1994:77-91).

According to Theron and Staden (1989) cited by Mthethwa (2004: 34), in U.K. education systems are developed to suit the individual needs of the different states. Middlewood (2001) cited by Cele (2008:5) mentioned the following features as the most important features of inspection of the U.K education:

- Performance Evaluation
- Accountability
- Examination and Evaluating
- Support
- Judgemental based on evidence
- Assessment of standards achieved

It is important to note that U.K and South African systems agree that a professional growth plan should be in place so as to help the teachers and the institutions to meet the expectation from the public.

### **2.6.1 The main reasons for the implementation of the UK system of evaluation**

Bradley (1991) cited by Nkosi (2007:78) argues that in the U.K. 46 out of 50 counties have statutory provisions which require the evaluation of teachers. Bradley states that laws governing the evaluation of teachers differ from one country to another. The school districts are responsible for the employment of

teachers and administrative personnel and for the evaluation of the teachers. Sava (1999:200) notes that teachers are evaluated for the reasons stated below:

- ❖ For appointment.
- ❖ For probation and retention.
- ❖ Renewal of contracts.
- ❖ Dismissal of teachers.
- ❖ Promotion.
- ❖ Growth and development of the individual teacher.
- ❖ Initial certification of teachers.

According to Sava (1999:225) summative and formative evaluations were integrated and teachers' professional growth was considered. In United Kingdom internal and external quality monitoring committee was developed in response to the political and economic changes, as in the case in South Africa.

The review of these aspects was important as they form an integral part of quality education. They also formed part of my investigation in this study.

## **2.7 AFRICAN COUNTRIES SYSTEM OF EVALUATION**

This subsection will try to provide a historical aspect to the emergence of the African System of Evaluation and also give an account as to what gave rise to it. The main focus will be on the African countries that affiliated to the Association for the Development of Education in Africa (ADEA). I will further interrogate this system by looking at its features in terms of its strengths and weaknesses with the view to checking what impact it has on the South African system of evaluation.

Nkosi (2004:32) argues that "following the adoption of the Association for the Development of Education in Africa (ADEA) working group on the Teaching Profession work program for 1995- 1997 at the Team

Management Support (TMS) review meeting which was held in Ghana in July 1995, eight Southern African Development Countries (SADC), hatched a regional plan of action for improving inspection and advisory services.” He argues that the global objective of the region was to improve the quality of basic education through a structured training program for school inspectors as well as the continuous professional support.

The Commonwealth Secretariat (1998) cited by Hibbers (2006) states that a number of regional TMS working group meetings were held by the Southern African Development Countries (SADC) from 1995-1998. The first meeting was held in Botswana in 1995 and then in 1996 another meeting was held in Zimbabwe. Zambia was the next country to host the TMS working group during 1997, then also in 1997 another meeting was held in Lesotho. In 1998 it was the turn of Namibia to host the TMS working group meeting. The main aim of these meetings were to identify the priority training needs for the basic school inspectors; to develop needs led training modules for the school inspectors; to promote quality education; to test the training modules in all participating countries and lastly , to conduct the first training of trainers in the region of Namibia in February 1998. It was hoped that the conference would initiate a step towards designing a coherent evaluation model for the SADC countries.

According to Hlongwane (2007: 45) citing Fullan (2001), the participating countries of the ADE identified what they perceived as the most important features of the inspection process. These were as follows:

- Examination and Evaluation,
- Judgement based on evidence,
- Judgement of learning and teaching,
- Assessment of standards achieved and
- Giving advice.

When one is analyzing some of the terms mentioned above as seen to be important by the ADE, for example the terms Examination, Evaluation and Judgement can easily be associated with what can be called a judgemental approach. In South Africa, the judgemental approach was seen as part of a regulatory framework for teacher development in a political system that was authoritarian and autocratic .It had conjured negative feelings as expressed by teachers such as a system to police and punish them for their poor performance. Mokgalane (1997) cited by Ngwenya (2003:88) concurred that the inspection

of teachers based on a judgemental approach had been unconditionally rejected by many teachers and teacher organizations in South Africa after the democratic elected government took over. Evaluation was seen as a function of inspectors within the departmental structures and little focus was on the Professional Development of teachers and quality education.

The Commonwealth Secretariat (1998) cited by Nkosi (2004: 35) states that the types of inspection models agreed upon by the ADE working group include the following:

- Full inspection, which include examination, advising, evaluation, feedback and in-depth assessment of all areas.
- Partial inspection, which include examination, advising, evaluating, feedback and snap check assessment of some areas.
- Special inspection, which include examination, advising, evaluation, feedback and in-depth assessment of special areas.
- Follow up inspection, which include examination, advising, evaluation, feedback and snap check assessment of some areas.

With regard to the stages of inspection Nkosi (2004:36) state that the ADE emphasizes that inspection should consist of three stages, namely:

**A Directive Style**, which is characterized by clarifying, presenting, demonstrating, standardizing and reinforcing.

**A Collaborative Style**, which is characterized by behaviours, listening, presenting, problem solving and negotiating.

**A Non-Directive Style**, which include listening, clarifying, and presenting.

### **2.7.1 The main reasons for implementing Africa's System of Evaluation**

Nkosi (2004:33) citing the Commonwealth Secretariat (1998) argues that the working group of the ADE agreed that the purpose of the inspection would be the following:

1. Improving teaching and learning,
2. Quality assurance quality control and quality audit,
3. Promoting effective administration and management of education,
4. Assessment of teaching and learning at school,
5. Provision of feedback,
6. Creating of a conducive climate of change,
7. Facilitation of curriculum development and its implementation,
8. Ensuring provision of adequate resources and
9. Conducting needs assessment.

The KwaZulu Natal Education Department's Continuous Professional Development and Support Policy Framework (2003:102) state that "an education professional, is a lifelong learner who should have fair access professional development needs to all opportunities for development, support and career progress". This implies that the professional development is an ongoing process; learning development of a teacher is never complete. Development prepares teachers for career advancement, improves the performance and encourages them to use new techniques and methods.

After discussing various aspects of global perspectives of school and teacher evaluations, I will then attempt to point out the aim behind discussing these systems in the next section. The review of these aspects is important as they form an integral part of my study, whilst my study purpose is to engage teachers who have gone through the process of evaluation using IQMS, to investigate whether their evaluation does or does not contribute to quality education which also is part of my investigation in this study.

The next section looks at the theoretical and conceptual frameworks that guide this study.

## **2.8 THEORETICAL and CONCEPTUAL FRAMEWORKS**

This subsection attempts to identify and describe the models, paradigms, positioning of the research and theories of assessment that are guiding this study. Steyn (2006: 427) argues that studies on the appraisal process predominantly identify two models, namely the accountability model and the professional development model. Research shows the distinctiveness of these two models and is reflected in the number of studies that utilized these two models (Poster & Poster, 1992:1; Keitseng, 1999:25; Goddard & Emerson, 1995:10). The accountability model is managerial, control oriented, judgemental and hierarchical (Monyatsi, 2003:66). On the other hand Murdock (2000:55) points out that the professional development model is viewed as a genuine two way process between appraiser and appraisee and is based on individual development.

Integrated Quality Management System was developed around a collaborative model, development model and an accountability model. According to Ngwenya (2005:90) citing Grobler (1992:188) a collaborative model emphasizes support for teacher's growth and collegueship. Mthethwa (2004:97) further says that a collaborative model style encourages teachers of varying abilities and interest to work together in groups so as to solve problems, plan together and also achieve a common goal which is in this case quality education. The main aim of this study is to know and understand teachers' feelings and perceptions in promoting quality education through their evaluation using IQMS.

Hariparsad (2008:7) provides a useful theoretical framework of quality education through teacher evaluation process. This author described the functions that can be fulfilled by teacher evaluation process, as follows:

- A formative function for the development of professional teaching skills
- A summative function for selection and as a basis for grading and promotion
- A socio-political function as providing motivation in order to improve teacher effectiveness or to promote certain preferred teaching actions
- An administrative function for the exercise of authority

To conceptualise the issue of quality education, Maslow's hierarchy of needs theory and Peter Senge Career stage theories are useful in explaining teacher evaluation and to help understand their feelings

and perceptions. According to Maslow (1954) cited by Mthethwa (2004:23), the needs range from physiological needs, the second level of needs is security needs, the third level of need is affiliation need, the next level is esteem needs which is about the recognition by others and the last level of needs on which my study is based - self-actualization needs. Examples are personal growth, self-fulfillment and realization of one's potential. Weller and Weller (2000:150) state that with most educators producing work of high quality is a means of self-actualization. Then teachers will be eager and look forward to evaluation so that they can be developed professionally. Freeman and Stoner (1992:440) cited by Mthethwa (2004:25) believe that no school can succeed without a certain level of commitment and effort from the teachers. Peter Senge's Career stage theories (1990) agree with Maslow's self-actualization needs as one of its characteristics is that, it supports staff members in their professional growth and also improve job performance as well as increase the level of personal satisfaction. The above literature reviewed suggests that IQMS has a major role to play, as the IQMS System's Training Manual (2003:1) clearly states that one of the purposes of IQMS is to provide support for continued growth.

IQMS as a teacher evaluation tool is associated with the positivist paradigm. According to Eksteen (2005:188) citing Laid (1993:284), states that most of the studies on teacher evaluation are quantitative in nature. According to this author, a positivist researcher will construct an instrument to be administered in a standardized manner according to the predetermined procedures.

However, my study is located within the interpretive paradigm. Furthermore, this study will follow a qualitative approach. A qualitative approach will provide insights into the experiences and feelings of teachers during their evaluation using IQMS in a holistic fashion, since the main aim of this study is to know and understand teachers' feelings and experiences during their evaluation. Also this study attempts to find out what impact does IQMS evaluation have in terms of promoting quality education. One of the characteristics of the interpretive paradigm is that, the researcher would give meaning to select data. There is a lot of interaction between the researcher and the participants. This paradigm is mainly concerned about understanding rather than quantifying. Interpretivists believe that knowledge is concerned not with generalization, prediction and control but with the interpretation, meaning and illumination (Bernstein, 1983). In the next section I discuss other countries' models of teacher evaluation to check for similarities and differences to our own system.

Dimmock (1998) cited by Hlongwane (2007:125) argued that, in Australia two models of appraisal have been in use for some time, one leading to promotional eligibility and the other to professional development. This author further stresses that, recently the latter model has tended to dominate largely because of the lack of promotional opportunities available. He suggested that the two models of appraisal are not irreconcilable and that appraisal, for staff development could be seen as a generic model embracing career development and promotional eligibility.

According to Sava (1989) cited by Mncwabe (2007:55), state laws in the USA have suggested two models of teacher assessment: one protecting students and the public from incompetent teachers and the other fostering a teacher's professional growth. According to this author the first model will justify the decision to demote, transfer, dismiss or promote a teacher, while the second model would be used for diagnosing the weaknesses in the performance of a teacher and specify measures for development. "Control of education in American schools is largely at local level by districts and boards of education" Nkosi (2004:44). Turner and Clift (1989) cited by Cele (2008: 201) argue that the use of a checklist appraisal model was common in the USA. This kind of model has been used as a basis for contract renewal or dismissals.

According to the Association for the Development of Education in Africa (1998) cited by Ngwenya (2003:34), African countries agreed that their system of evaluation should be based on an inspection model. Below are various kinds of inspection models.

- ❖ Full inspection, which deals with examining, advising, evaluation, giving feedback and in depth assessment of all areas.
- ❖ Partial inspection, which deals with examining, advising, feedback snap check assessment of some areas.
- ❖ Special inspection, looking at examining, advising, evaluating, feedback and in-depth of special areas.
- ❖ Follow up inspection, focusing on examining, advising, evaluating, feedback assessment of some areas.

According to the Association for the Development of Education in Africa, the above mentioned mode of inspection should be informed by the three basic styles, namely:

- 1) A directive style, which involves clarifying, presenting, demonstrating, directing, standardizing and reinforcing.
- 2) A collaborative style which deals with the behaviors, listening, presenting, problem solving and negotiating.
- 3) A non directive style, it is assumed that teachers are able to solve their problems and it promotes trust in teachers.

I strongly believe that the model below provided by Hariparsad (2008:8) in Figure 2.8.1 clearly shows how the teacher evaluation system as part of education system can be used in promoting processes of quality education in South African schools.

**Figure 2.8.1 Hariparsad (2008:8) provides a Conceptual model in explaining the evaluation of Teacher Performance in South Africa**

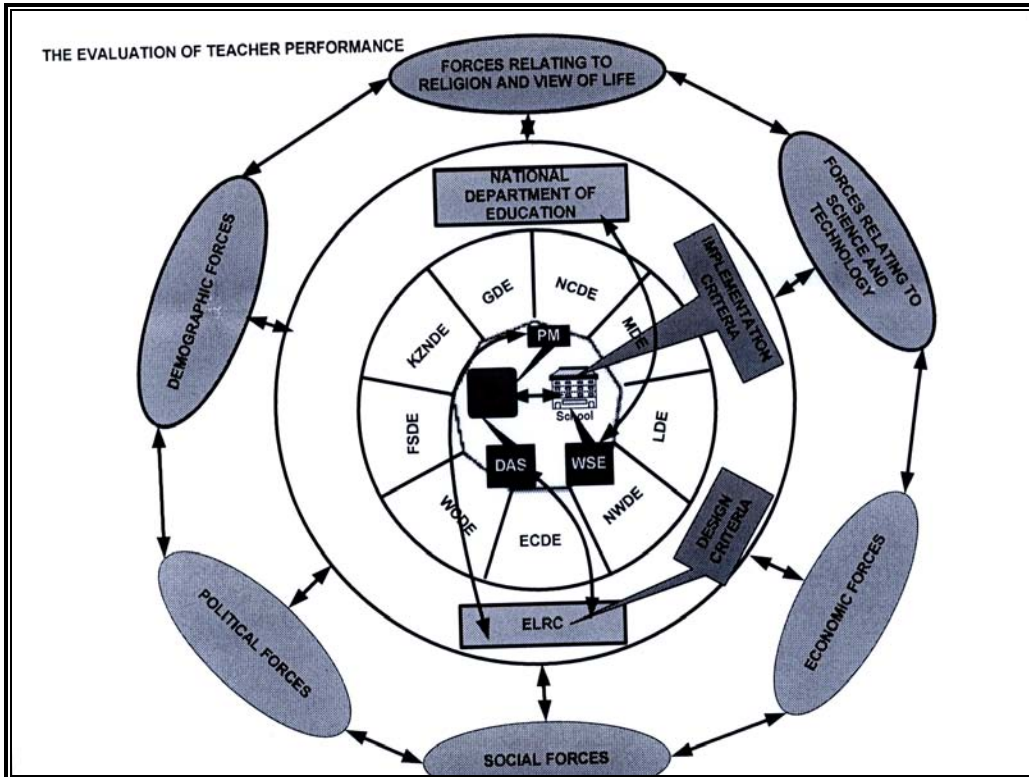
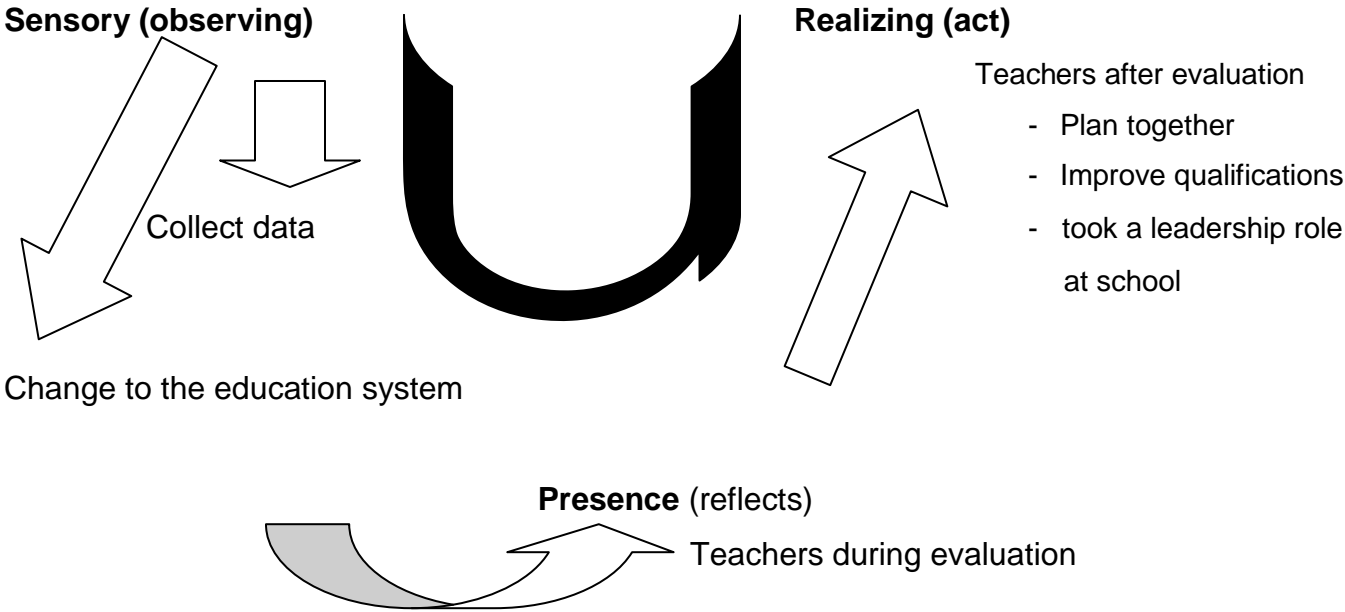


Figure 2.8.1 (above) illustrates the conceptual model in the form of a diagram that can be used to show a systematic management pattern in ensuring quality education through teacher evaluation in South Africa. This model according to Hariparsad has great potential in contributing towards the transformation of public education. According to this author, quality education is the cornerstone of democracy and the key to social, political, economic and to demographic forces vitality. Hariparsad says that all the stakeholders that form the system need to operate and work in a collaborative and collective manner in promoting quality education. When all the stakeholders in the system become fully engaged with one another in the work of promoting quality education, then a community of learners will be created. On the other hand, Hariparsad (2008:7) argued that, the model can further indicate a severe shortcoming in most teacher evaluation systems throughout the world. The design of the system and implementation of an evaluation system are seen as two separate things. According to this author, the IQMS system was designed by the ELRC together with the National Department of Education using minimal teacher input via teacher unions. At the level of school, the principal and the School Development Team (SDT) together with the Development Support Group (DSG) have to implement the performance measuring instrument. Very few of them will have been involved in the designing of the instrument. Harisapard (2008:7) suggests that, any teacher evaluation system needs to be designed by both the teachers and the national department of education. According to this author, teacher evaluation systems should not be designed by so called experts who have long since retired from the classroom. Minimal training (if any) by the officials who have little knowledge of performance management needs to be revisited.

However, there has recently been a greater recognition of diversity of theories in the teacher evaluation systems. Scharmer (2001) cited in David I. Rome (2004:2- 6) provides the “U” theory of change which I think is useful in explaining IQMS in promoting quality in education and to help understanding teachers’ experiences during their evaluation process. Teacher appraisal should be viewed as an intervention which aims to benefit both the school and the individual educator in pursuit of quality education (Monyatsi, 2003:23). In other words, teacher appraisal ensures teacher’s competence and is therefore an aid to professional development and accountability. For the purpose of this study, IQMS should be viewed as one of the interventions which include professional development, in-service training and career planning which is aimed at improving the quality of education in schools (Gunter, 2002:67). IQMS as a teacher evaluation tool was crafted with an aim of developing teachers and improving the quality of education. The major aim of IQMS is to develop teachers and improve the quality of education; however

the effectiveness of the process of teacher appraisal depends on the perception of the teachers themselves. Hence the purpose of this study is to investigate teachers' perceptions of the new system of teacher appraisal called IQMS through their lenses. Rome (2004:2) commented as follows: "Presence is a process of letting come, a way of participating in a large field of change by which the forces shaping a situation can shift from recreating the past to manifesting or realizing an emerging future." The author acknowledges that the shift in awareness has much in common with traditional teachings and practices of indigenous cultures. In an attempt to address the above statement, this study will focus on how all the stake holders namely: teachers, education officials, parents, government and learners can work together in a collective manner in ensuring and promoting quality in education. Another model associated with study is provided by Scharmer. Scharmer (2001) cited in Rome (2004:2) developed a theoretical skeleton that proposed a three stage model for deep change, with letter U serving as a simple and elegant device. The left-hand, downward stroke of the U is called **Sensing**, the turn at the bottom is **Presencing** and the upward stroke is **Realizing**.

Figure 2.8.2 below shows Scharmer – U theory of change cited in David. I. Rome (2004)



I strongly think and believe that Scharmer's U theory of change best describes the intentions of my study which is about using IQMS to evaluate teachers in promoting quality education. IQMS intends to promote

the quality of education through continuous improvement in the quality of teaching and learning and of community practices. The 'U' theoretical framework by Scharmer explores, from external agency to change to internal agency to change. According to this theory, teachers internalize the need for change and after going through the process of evaluation using IQMS manifest this in the following actions:

- Teachers felt more confident in their teaching as the Development Support Group (DSG) is there to support them.
- Teachers became agents of change in schools through registration for developmental programmes like NPDE and ABET.
- Took a leadership position in schools, namely Subject Committee leaders and Staff Development Team leader.

Three different models that were discussed earlier on and which are summarized below clearly explain the theoretical framework of this study.

1. Model based on conceptualize of quality management systems.
2. Model based on functions of quality management systems.
3. Model based on notion of stage development.

All 3 types of models provide theoretical construction to understand the process of teacher evaluation through IQMS. For example, the conceptualization natures of quality management systems provide the theoretical constructs to understand how collaboration within the IQMS system becomes a necessary feature in the school efficiency.

Hence a multi-model theoretical approach to understand teachers' experiences of IQMS is used in this study.

The next discussion will be on the current research conducted on teacher evaluation in South Africa.

## **2.9 CURRENT RESEARCH DONE ON QUALITY EDUCATION IN SOUTH AFRICAN SCHOOLS**

The purpose of this section is to look at the different kinds of research that have been conducted on quality education through teacher and school evaluation in South Africa. A lot has been written around this topic locally, but this presentation will only be based on research conducted by Aheer (2006), Mthethwa (2004) and Faulkner (2001). Reviews of these studies are done with a view of using insights gained from them in informing and shaping my study.

The first study to be discussed was conducted by Aheer (2006) in the province of Gauteng. The methodology that was used to carry out that study included a generic qualitative research approach with grounded theory elements in the analysis (Merriam, 1996). The purpose was to investigate the relationship between the school –based educators, the school management team and the district office with regard to the advocacy of quality assurance programmes as ways and means of promoting quality education in schools.

From the research done it is clear that the relationship between the school – based educators, the management team and the district is negative and unhealthy. One of the findings was that, according to the school – based educators the district officials act as if they are in charge and hold a more powerful position than anyone at school. Their actions demonstrate that they are empowered to tell the school – based educators what to do (Hariparsad, 2008:36 – 37). The school – based educators objected to the autocratic telling style adopted by the district officials in the strongest terms. They strongly believe and feel that the district officials should adopt a participative leadership style by involving them in the formulation and designing of the quality assurance programmes.

One of the most remarkable findings is that, the school – based educators generally agree that district offices do not provide sufficient support. The findings of this study helped me understand that in order for quality education to be a success, all stakeholders namely: teachers who are supposed to take a leading role in promoting quality education in schools should be actively involved in the designing of the quality assurance initiatives. Secondly, I as the researcher strongly believe that when educators understand and are made to own any programme and understand its' purpose they will implement it. Thirdly, the educators' performance will automatically improve learners' achievement as well which will result in the improvement of the quality of education.

The second study was done by Mthethwa (2004) at Ndwedwe circuit. This author explored the promotion of total quality management in schools. This study examined the role of principals in the promotion of total quality education in schools. The context for this study was rural schools in the province of KwaZulu-Natal. This study followed a qualitative research design. Questionnaires and interviews were utilized. The study was conducted with a population of 75 principals. Of the 75 questionnaires sent out, 49 questionnaires were completed and returned. Simple Random sampling technique was used under this study. A detailed overview of this technique in the data analysis of this study was provided. The major findings of this study are as follows:

- Principals have not effectively transformed the culture in schools to reflect total quality management by involving educators in quality matters,
- Principals do not allow different staff members to lead staff development programs,
- Principals have not initiated in- service training for educators to capacitate and skill them to participate meaningfully in the management of schools.

Mthethwa's recommendations reveal that, principals of schools should not underestimate the potential of staff. The principal should allow the use of internal expertise (staff members) in training and developing of other educators. Quality teams must be established by the principal to oversee quality processes and outcomes in the school.

The third study to be reviewed was conducted by Faulkner in 2001 on Whole School Evaluation (WSE). His study focused on how Whole School Evaluation as one of the Quality Assurance initiatives can improve quality in schools. Faulkner (2001:9) citing van Niekerk (2003:165) defines Whole School Evaluation as a collaborative, transparent process of making judgements on a holistic performance of the school that is measured against agreed national criteria. According to Faulkner (2001:10) school evaluation was aimed at assisting the Quality Assurance process. It was established to improve report, monitor and evaluate publicly on the school performance. He also points out that Whole School Evaluation as a school evaluation model was aimed at school improvement and accountability. To support his statement, he pointed out that in the national education policy number 27 of 1996; a minister is mandated to direct the standards of education delivery and performance to be monitored and evaluated annually. Faulkner (2001:10) identified the following areas as the important areas for Whole School Evaluation:

- **Basic functioning of the school**

According to him, this area involves attendance rate, contact time and functional school days.

- **Leadership, management and communication**

This area focuses on staff development, record keeping, administration and code of conduct.

- **Governance and relationships**

This area focuses on the School Governing Body training and it checks if the stakeholders are satisfied with the quality, efficiency and effectiveness of the education system.

- **Quality of teaching and educator development**

This area calls for teachers to undergo in-service training to develop their knowledge and skills.

- **Curriculum provision and resources**

This area monitors the use of resources by learners, checks the learner educator ratio and educators' qualifications.

- **Learner achievement**

This area focuses on the performance of learners on pass rate and matric results.

- **School, safety and security**

This area deals with the safety of learning atmosphere.

- **Parents and community**

This area deals with parents and community involvement in the running of the school.

Some of the major findings from Faulkner's study pointed out that,

- Schools were not providing quality service.
- Parents and the community were not participating in the running of the school.
- Schools did not reflect the needs of the community.
- Resources were not allocated to some schools.
- Teachers were not trained adequately.

Faulkner's recommendations reveal that, evaluation must be standardized and consistent .Secondly, all stakeholders need to take responsibility for the quality of their performance. Lastly, the district offices need to grant adequate support to ensure coherence and consistency.

## **2.10 Chapter Summary**

This discussion in chapter two was a literature review on teacher appraisal systems globally. Looking back at the studies that have been reviewed none of the studies reviewed focuses on the post evaluation impact. In South Africa, IQMS as the new system of evaluating teachers was supposed to lead development and the question is, does this system serve its purpose? Hence one of the purposes of the study is to explore whether IQMS as a tool to evaluate teachers, serves the purpose for which it is intended

## **2.11 Conclusion**

In chapter two I discussed teacher appraisal systems used globally. This chapter also provided an historical account of how teacher appraisal systems emerged and changed over the years. It is in this chapter that I identified some of the models that guide teacher evaluation including the IQMS. Theories associated with the study of appraisal systems were discussed. The next chapter, chapter 3, presents the research design, the methodology and the processes through which data was collected.

## **CHAPTER 3**

### **RESEARCH METHODOLOGY**

#### **3.1 INTRODUCTION**

Chapter one, through an overview of the study, presented a focus and rationale for the study, while chapter two presented a review of literature and theoretical framework that guided the data production and analysis of the data. In this chapter, a detailed account of the methodology used in this study will be outlined. Briefly, the study employed a survey methodology using a questionnaire and a semi-structured interview for the production of the data. The rest of the chapter presents the process of data production and arguments for the methodological choices made in this study.

#### **3.2 Methodology employed in the study**

Consistent with the purpose of this study, a qualitative approach to the study was taken. The study sought to explore and understand the impact of the IQMS on teachers post their evaluation and in order to achieve this purpose, the qualitative approach was deemed the most appropriate approach to this study. Kruger (2003:95) states that, the qualitative approach creates openness between all parties and can help to generate new theories. Cohen and Manion (1989:107) stress that qualitative researchers are interested in what is referred to as the participant's perspectives. Emphasis is placed on the importance of looking at variables in the natural settings in which they are located.

Working within a qualitative research design, the study attempted to understand people in terms of their own definition of their world. Hence this study was also located within an interpretivist paradigm that sought to understand the meanings that teachers make of the IQMS evaluation activity and its implications for their (teachers') professional growth.

IQMS has now been widely implemented in schools within South Africa. This study therefore attempted to get a broad based understanding of the impact of IQMS on teachers. Hence, the most appropriate methodology for this scope of study would be a survey methodology. Surveys, according to Mthethwa (2004:35) citing Cohen and Manion (1989:97) allows for the gathering data at a particular point in time with the aim of describing and explaining the nature of existing conditions, identifying the standards against which existing conditions can be compared and determining the relationships that exists between the specific events. In this study, a survey of teachers and principals of schools allows me the scope to explore and understand the impact of IQMS on teachers' lives as explained by them. Hence teachers and principals of schools are the providers of information for the study. Due to the scope of the study programme, the Inanda Ward, in the Pinetown District was chosen as the delimits of the study.

### **3.3 Delimits of the study and sampling process**

Shipman (1981:52) refers to sampling as a systematic way of choosing a group small enough to study and big enough to be representative. Cohen and Manion (1989:101) state that "*due to the factors of expenses, time and accessibility it is not always possible and practical to obtain measures from the whole population*". As stated earlier this study was conducted in schools within the Pinetown District. This district is made up of four circuits, namely Inanda Circuit, KwaMashu Circuit, Indwedwe Circuit and Phoenix Circuit. These circuits are scatted all over the large geographic area. I, therefore, felt that it was practically impossible to include all the schools under Pinetown District, hence decided to conduct this study at Inanda Circuit. Further, the choice of this geographic region was motivated by my access to the schools in this area as I am a Principal of one of the Schools in this Ward.

Purposive sampling as a sampling technique was used in this study, based on the access to schools and the willingness of the participants. Kidder (1981:78) argues that the best way to assure that the results can be generalized is to draw a representative

sample. On the other hand Silverman (2000: 123) states that in a purposive sampling, the researcher must first think critically about the parameters of the population and choose the sample case accordingly. As this study focused on the understanding of the impact of IQMS on teachers, and generalisability was not one of my aims, purposive sampling was deemed most appropriate for this delimited study.

In this circuit 125 post level 1 teachers were targeted for the questionnaire survey according to gender, age, race, qualifications, teaching experience and the type of school the teacher teaches in .Three (3) principals were also targeted for in-depth semi-structured interviews. Of the 125 questionnaires sent out, 100 questionnaires were completed and returned. The number of completed questionnaires makes 80% response rate. Twenty five questionnaires were either not filled or not returned, translating it into 20% non-participation.

Creswell (1998:118) comments that, “the purposeful selection of the participants represents a key decision point in qualitative study”. Erlandson et al (1993:33) state that, the search for the data must be guided by processes that will provide rich details to maximize the range of specific information that can be obtained from and about that context. In this case, the purposeful nature of sampling related to two issues. First by access to the participants and secondly, by teachers and school managers were specifically chosen for having been gone through an IQMS evaluation process. Hence not all teachers in the Ward were chosen for the study.

### **3.4 Research instrument used in the study**

Two data collection instruments were used for this study. The first was a questionnaire. The questionnaire was the most appropriate instrument to collect data from the teachers on their (teachers) account of the impact of the IQMS on themselves. Goddard and Melville (2001:45) state that the questionnaire allows one to obtain information from a large sample of respondents in order to obtain trends and patterns and sometimes opinions on an issue. In this study the questionnaire was the most appropriate strategy for the study to obtain information on trends and patterns of teachers' experiences having gone through IQMS. The information gleaned from the survey was used to get a sense of what teachers' views of the IQMS were and what benefits they derived from this evaluation process. Teachers who had gone through an IQMS evaluation in the Inanda Ward were given questionnaires to complete and return.

Goddard and Melville (2001:47) define a questionnaire as "a printed list of questions that respondents are asked to answer". Questionnaires were issued to Post Level one teachers because the purpose of this study is to find out from the teachers themselves about their experiences, perceptions, thoughts, expectations, feelings of going through the IQMS evaluation. Smith and Thorpe (1991:120) cited by Mthethwa (2004:36) notes that if questionnaires are well designed, they become easy to complete and the respondents may get interested and willing to devote more time to it.

Cohen and Manion (1989:106) argue that an ideal questionnaire possesses the three basic properties namely, clear, unambiguous and lastly uniformly workable. They further identify the following factors that secure a good response rate to questionnaire. They said that a questionnaire should be attractive, have clear instructions to respondents and questions should be arranged in such a manner that they encourage maximum co-operation from the respondents.

Kidder (1981:148) cited by Mthethwa (2004:36) list the following strengths of a questionnaire:

- Questionnaires allow data to be collected from a large number of people.
- Data can be displayed in tables and graphs.
- Questionnaires are replicable and can be used in later studies.
- Questionnaires are less expensive to administer mainly because they can be mailed or hand delivered to respondents.
- Respondents may have greater confidence in their anonymity and thus feel free to express their views.
- Questionnaires place less pressure on the respondent for immediate response.

While capitalising on the strengths of a questionnaire in its design, there are noted limitations to the use of this instruments for data production. Gummesson (1991:112) argues that one disadvantage of using the questionnaire is that, the emphasis is mostly on verbal statements and non verbal gestures are neglected. Further,

- Questions can not be explained to the respondents and sometimes can be misinterpreted. This may result in data that is not relevant to the study.
- There is a possibility of low response rate.
- Questionnaires are not useful if you want the very detailed information about the reasoning behind the respondent's view.
- The respondent may give false responses.

The questionnaire to teachers was developed with the strengths and limitations taken into consideration. The best way, then, to test the usefulness of the questionnaire in terms of the above listed strengths and limitations, a pilot of the questionnaire to a group of teachers who were not part of the study sample was conducted. The review of

data collected through the pilot study revealed that some questions in the questionnaire produced repetitive responses and were subsequently removed in the final version.

The second instrument used in the study was a semi-structured interview schedule developed for the interviews of three principals of selected schools in the Inanda Ward. The purpose of the interviews was to gather information concerning the IQMS implementation process at schools. As principals are responsible for the training and dissemination of the information on the IQMS to the staff, they were deemed the most appropriate persons to provide information on what information were presented to teachers during the IQMS training sessions as well as to establish what issues emerged through the IQMS process.

Rubin and Rubin (1995:31) cited by Mouton (2003:196) indicated that interviews emphasizes the relativism of culture, allows for active participation of the interviewer, and gives importance to the interviewee voice. McCullough (1998) argues that the interviews are one of the most obvious ways of finding out about people, because you as the researcher are talking to them. Preissle (2002:122) characterizes the interviews as a kind of conversation, a conversation with a purpose. Preissle (2002:124) argues that, semi-structured interviews have an interview schedule, namely a list of questions with probes or prompts. By doing in-depth semi-structured interviews a researcher can allow the respondent to give more detailed answers and express his or her own views.

As with most instruments used in data production, interviews do have their strengths and weaknesses. McCullough (1998:320) regard the interviews as one of the best form of survey in carrying out an educational survey because there is a lot of interaction between the researcher and the participants. Cohen and Manion (1989:284) agree with what is said by McCullough and further list the following strengths of the interviews

which were taken into cognizance when developing the questions for the interview and whilst conducting the interviews:

- Interviews allow in-depth coverage of the issue.
- Rich data is produced.
- The interviewer can adjust questions and change direction as the interview is taking place.
- Respondents are treated as experts because they are telling their stories.
- Interviews can raise issues the interviewer did not consider but which is important.
- It allows flexibility in coverage.

Preissle (2002: 110) list the following as some of the limitations of interviews as a data production technique:

- ❖ Interviews are time consuming both in terms of data collection and data analysis.
- ❖ Because of the small size of the sample, your results are unlikely to be representative of a particular population.
- ❖ Only the relatively small number of these interviews can take place because they can last for the long time.
- ❖ Respondent might be influenced by the way questions are asked and the general appearance of the interviewer.

In designing the questions for the interviews, the questions were mostly open ended which allowed the interviewer not to follow a particular order but rather to go with the flow of the responses. Having a list of questions with no particular order to follow allowed the interview process to be deeply reflective in the responses by the respondents. The interviews were audio-taped and permission for this is obtained prior

to the commencement of the interviews. These recordings were transcribed verbatim and the resulting texts analyzed.

### **3.5 Ethical Issues**

Gaining access to the research sites is a lengthy process. Permission from the Department of Education, principals of schools and the teachers were sought prior to any data being collected. In obtaining permission to do the study, letters of requests were sent to identify gatekeepers. The letters contained crucial information about the research and these included:

1. The topic of the study.
2. The nature and the purpose of the study.
3. The identity and the institutional association of the research, supervisor and the researcher and their contact details.
4. That participation is voluntary.
5. That the respondents will be treated in a confidential manner.
6. That the participant is free to withdraw from the research at any time without any negative consequences.
7. A brief explanation of how the subject was identified.
8. A clear explanation of what is required of the participants who agree to participate.
9. Potential benefits to be derived from participating in the study.
10. A statement on the use of any written, audio or video recordings made.
11. An indication of how and when the gathered data will be disposed.

The participants were guaranteed anonymity as the analysis did not identify any particular individual or site. Rather, the analysis was thematically done and this did not require individual responses. Further, the anonymity of the research sites was preserved through the use of the pseudo-name in the text of the dissertation and in any

oral presentation that may arise. No disclosure of names and places will be made in any public forums.

### **3.6 Validity and Reliability**

#### **3.6.1 Validity**

Rubin and Rubin (1995:195) define validity as follows: “Validity tells a person, how well a variable measures what it is supposed to measure. Smith and Thorpe (1991:121) cited by Mthethwa (2004:41) agree with Rubin and Rubin’s definition, as they view validity as: “*How we can be sure that the instrument measures the attribute it is suppose to measure*”. Validity was ensured through a pilot test of the questionnaire to see whether the instrument did what it intended to do. Further, Interviews were tape-recorded and transcribed. The transcriptions were given to the respondents to verify the correctness of their responses. Field notes made during the interviews were also used to verify the data collected during interviews.

#### **3.6.2 Reliability**

According to Denzin (1989:85), reliability tells you how reproducible your measure on a retest. Laird (1993:285) argues that, reliability is a matter of how stable the results are if an instrument is administered on the same individual twice, will yield the same results. To ensure reliability, triangulation whereby survey data through the questionnaires were to some extent verified by interview data.

### **3.9 Data Analysis**

Rubin and Rubin (1995:226) describe data analysis as follows: “*Data analysis begins while the interviews are still underway*. This preliminary analysis tells you how to redesign your questions to focus in on central themes as you continue interviewing.”

Mthethwa (2004:42) citing Kidder (1981:296) argues that, data analysis involves the conversion or reduction of information that a researcher collects through research into a form of statistical tabulation thus ensuring easy storage and access for the future. The analysis for this study was guided by themes that were developed from the data which were categorized initially according to common issues as illuminated through the literature review and theoretical framework. Data were pulled together from all the interviews and the questionnaires that speak to one theme or concept.

### **3.7 Critique of the Methodology**

According to Babbie and Mouton (2001:64), the problem with purposive sampling is that, different researchers may proceed in different ways to obtain such a sample and thus it is impossible to evaluate the extent to which such samples are representative of the relevant population. Silverman (2000:156) argues that purposive sampling is the most important kind of non-probability sampling. According to this author, the advantage of non-probability samples is that they are less complicated and more economical in terms of time and financial expenses than probability samples.

Against this background, the researcher utilized purposive sampling. When doing qualitative research, one has to make time allowances for the unexpected that might happen, for example: gaining access to schools can be problematic, cancellation of the appointment unexpectedly by the participant, slow and non-responses of the questionnaires by the participants and finances for traveling to the agreed venue of the interviews. The researcher did allow changes to the scheduling.

As stated previously the study utilizes qualitative approach. Rubin and Rubin (1995:31) highlight that; qualitative approaches create openness between the researcher and the participant; however this openness can in some case be counter productive. In trying to overcome this limitation, the researcher time and again explained the purpose of the

study and that data collected was to benefit the participants, other schools that were not part of the study and the policy makers.

The design of this study focuses on the illumination of the concept, it does not allow for generalization across the schools.

### **3.8 Conclusion**

This chapter presented an argument for the choice of methodology that was used in this study design. The choice of research instrument and the reasons for these choices as well as the process of selecting the participants were presented. The chapter alluded to the strengths and the limitations of the research instrument and how these were considered in the data production process. A brief discussion on ethical issues related to this research was presented. The chapter also elaborated on how validity and reliability issues were dealt with in the study. The chapter concluded with a description of how the data was analysed and some of the critiques one may expect of this study design.

The next chapter, chapter four presents the data produced through this methodology, as well as the analysis and interpretation of the analysis.

## Chapter 4

### ANALYSIS AND INTERPRETATION OF DATA

#### 4.1 Introduction

To reiterate, this study focuses on teachers experiences of the IQMS evaluation systems. It attempted to explore the outcome of IQMS within the school context with a specific focus on outcomes related to teachers. Further, this study attempted to document the experience of schools' trip through the IQMS process from the perspective of teachers and the school managers. The following research questions guided the study process and analysis:

- 1 What impact did the IQMS evaluation have on the teachers' personal and professional lives?
- 2 What was the teachers and school managers' experience of going through an IQMS evaluation process in their respective schools?

The methodology chapter presented a detailed account of the data production process for this study. In summary, a questionnaire was administered to educators and an in-depth interview was conducted with the school managers who led the IQMS process within the research school sites. The responses and analysis of the data produced through the questionnaire and the interviews are presented below. The analysis is organized around emerging themes from the data which were influenced by the literature review and theoretical framework for the study. The response rate from the survey questionnaire was 80% (100 out of 125 administered questionnaires).

A biographical analysis of the participants associated with their perceptions about the IQMS is presented in the first section of the analysis. This is done to provide some emerging patterns of perceptions that teachers have about the IQMS. Section B presents an analysis of teachers' experiences of the IQMS process. Section C focuses on post-evaluation issues within schools. This is done to explore teachers' views on the

evaluation process. Finally, the last section presents an analysis of the managers' perceptions and experiences about the IQMS process. Words written in italics represent the voices of the participants throughout the analysis sections.

## **4.2 Section A: Teachers' perceptions on the IQMS policy**

The data in Tables 4.1 to 4.4 suggest that patterns of perceptions of teachers on IQMS are related to biographical profiles of the schools and teachers. In the following sections, the teachers' perceptions, thoughts, feelings and expectations of the effectiveness of their evaluation using IQMS are discussed and presented in the form of tables according to the following categories: teachers' educational qualification level; teachers' experiences; ages of the teachers and the description of the school to get a sense of why teachers expressed their experiences in the way they did and to establish patterns, as is characteristic of survey research, of teachers experiences of the IQMS process.

### **4.2.1 Relationship between teaching qualification, teaching experience and perceived benefits of IQMS**

This section explores the patterns emerging from the analysis of the patterns emerging from the relationships between teacher qualifications, their teaching experiences and their perceived benefits of the IQMS evaluation processes.

**Pattern 1:** Teachers with lower teaching qualifications and lower teaching experiences perceive the IQMS to be beneficial to them while teachers with higher qualifications and longer teaching experiences are suspicious of the IQMS.

Table 4.1 and 4.2 provide useful data to suggest that perceptions of IQMS by teachers vary according to their qualification status and years of teaching experiences. In general, more experienced teachers and those that are well-qualified have negative and suspicious perceptions of the IQMS, while teachers with less experiences and lower

teaching qualifications have positive perceptions about the benefits of the IQMS process.

**Table 4.1:** Table of teachers' perceptions of IQMS according to teachers' qualification level

	<b>Under and unqualified teachers</b>	<b>Teachers with a three year teaching Diploma</b>	<b>Teachers with Bed Degree qualifications</b>	<b>Teachers with Post Grad qualifications</b>
<b>Perceptions of suspicions and fault finding</b>	0	0	16	5
<b>Developmental perceptions</b>	35	43	0	1

**Table 4.2:** Table of teachers' perceptions of IQMS according to their years of teaching experiences

	<b>Under 5years</b>	<b>6-10years</b>	<b>11-15years</b>	<b>16years and above</b>
<b>Create tensions</b>	0	6	15	26
<b>Beneficiary</b>	42	2	0	0
<b>Arouse fears</b>	0	8	15	26

#### **4.2.2 Relationship between teachers' age and their perceived feelings towards IQMS**

This section explores the patterns emerging from the analysis of teachers' ages and their feelings towards the IQMS processes.

**Pattern 2:** Younger teachers tend to have positive feelings towards IQMS, while older teachers tend to have negative feelings towards IQMS. Middle aged (teachers between the ages of 30 and 50 years old) teachers tend to have mixed feelings towards IQMS.

**Table4. 3:** Table of teachers' feelings about the IQMS according to the ages specific categories of the teachers

	<b>20to 30 years</b>	<b>31 to 40 years</b>	<b>41 to 50 years</b>	<b>51years and above</b>
Positive feeling	38	15	10	0
Negative feeling	0	2	5	10
Indifferent	38	15	10	0

#### **4.2.3 Relationship between school resources and perceived teachers preparation for IQMS**

This section explores the patterns that emerges from the analysis of school resources and perceived teacher preparations for IQMS

**Pattern 3:** Levels of training for IQMS varies across school resource ratings. Average to poor resourced schools tends to have some form of training, while well resourced schools tend to have adequate training for IQMS.

**Table 4.4:** Cross-tabulation of levels of training of teachers on IQMS and resource levels of schools.

	<b>Well resourced</b>	<b>Above average resourced</b>	<b>Average resourced</b>	<b>Poorly resourced</b>	<b>No resources</b>
No training	0	0	0	0	2
Some training	0	7	19	43	23
Adequate training	3	2	1	0	0

A more detailed exploration of the above identified *patterns* supported by the qualitative data as presented by the respondents to the questionnaire is presented here. The words in Italics are the actual words given by the respondents.

Table 4.1 indicates that the majority of qualified teachers (Bed degree and Post Graduates) were suspicious of the purpose of the IQMS and indicated that *perhaps it was a return to the traditional, fault finding, mechanism of controlling them by the departmental officials, a top-down and bureaucratic system of evaluation of teacher's performance*. But this is not the same perception of teachers with lower qualifications, unqualified and under qualified and those with College Diplomas. The latter indicated that *IQMS is the way of developing them and helping them to know where they are in terms of their work performance and what development they need*.

**Figure 4.1:** Graphical representation of the teachers' perceptions of IQMS according to their years of teaching experiences

Table 4.2 and Figure 4.1 indicates that 55% of participants in this study were regarded as experienced teachers (teachers that have taught for more than five years) and these experienced teachers felt that IQMS evaluation *might create tensions and confusions*

*among the staff and might not succeed just like the rest of the policies (they mentioned the example of the Developmental Appraisal System). Furthermore, experienced teachers think that IQMS evaluation was too pressurizing time wise and it can create a false situation and a lot of window dressing is done. They also felt that IQMS arouses fears about one's future. Whereas 42% of the participants who were considered relatively inexperienced teachers (0 to 5 years of teaching experience) and three teachers who have taught for 6 to 10 years felt that IQMS evaluation was needed as it was to develop the educator and in turn be of benefit to the learner. Furthermore, the relatively inexperienced participants also felt that IQMS was good because after evaluated one gets the salary progression.*

The majority of the participants (55%) who are 40 years old and less are more receptive towards IQMS and were hoping that IQMS will help them to identify their strengths and weaknesses. They stated that they were *looking forward towards the improvement of resources, sharing of ideas, school and personal development, the improvement of learners' results as well as financial rewards.* It is a different story with the participants who are 41 years and above (35%) who felt that *educators are already over burdened with administrative work and should not have gone through IQMS evaluation and there is a lot of laborious processes of completing unnecessary forms (see Table 4.3).*

Participants were invited to tick 'positive feeling' or 'negative feeling' or 'indifferent' and they were requested to give a brief explanation about the way they feel. Data shows that 38% of the respondents (all between 20 years and 30 years of age) had positive feelings about IQMS. They responded by saying that, *those educators who do not open up will become more open [through the IQMS process] and [will be able to] communicate their difficulties and could make positive input about themselves.* Furthermore these participants felt *well equipped to undertake the IQMS.* They saw IQMS as favorable because they could *engage in inner reflection and self analysis.* Eighteen percent of the participants (who were between 31 years and also 40 years)

had positive feelings about IQMS and its intentions. They viewed IQMS as a *relevant tool of transforming education in the right direction and the improvement of the learners' results*. On the other hand 2% of the participants of the very same age group had negative feelings about IQMS, saying that *teachers were abusing the instrument since people were not truthful when evaluating each other*. Hence evaluation was being done by peers and friends and *nobody wanted to give their friends low scores or negative comments even if their friends deserved that low score*. Another 12% of the participants (between the age group of 31 years to 40 years) were indifferent about IQMS. Moving over to the next age group, 10% out of 20% participants who were between 41 and 50 years old were having positive feelings about IQMS. Further, as data reveals, 5% of participants of the very same age group had negative feelings about IQMS, stating that *IQMS was just another education department waste of time*. Looking at the 10% of participants that were in the 51years old and above category, all had negative feelings about IQMS. They viewed IQMS as *ways and means of the Department of Education of forcing them to exit the teaching profession by introducing something to frustrate them* (see Table 4.3).

### **4.3 Section B: Teachers' experiences of the implementation of IQMS**

This section focuses on educators' experiences of going through the IQMS evaluation process. It deals specifically with preparations for IQMS.

Participants were asked to list all the activities that their schools engaged in preparation for the IQMS preparation. The actual words spoken by teachers are presented in *italic* within the analysis as evidence to support the arguments being made.

#### **4.3.1 Adequacy of training received by teacher on IQMS**

All the participants indicated that they received some sort of training and workshops at the school level on IQMS (see Table 4.4), implying that they had some level of understanding of the IQMS relating to the purpose, procedure and implementation.

Respondents also indicated that they *became familiar with the various stages of the IQMS process through the training sessions*. This means that, the training and workshops that were organized at the school level were successful in bringing about an awareness of the IQMS policy as well as describing the steps required to implement the IQMS process.

While the advocacy process and information dissemination process on the IQMS was considered as successful based on teachers' exposure through the training and workshops, there were variances with regards to the depth of engagement with the policy and the process of IQMS. Respondents from well resourced schools felt that, the workshops conducted at their schools were appropriate and interesting, since technological equipment like overhead projectors and power point presentations were used during the presentation. Furthermore each and every educator was issued with his/ her own IQMS policy document and educators were actively involved in the workshops and there was interrogation of the policy as educators were able to refer to their policy documents. Respondents from those schools that were regarded as 'less resourced to having no resources' expressed views of inadequacies in the training process. They think that, information dissemination was very bad and poor since the principals that were conducting the workshops were the only ones that had the policy documents. Respondents said that they were *asked to listen to their principals reading the long policy documents page by page without referring to their own policies as their schools could not afford to provide them with their own documents since their schools had no electricity*.

The analysis of the adequacy of training received by teachers on the IQMS suggests that teachers were adequately made aware the IQMS as a system of evaluation as well as the process that needed to be followed. However, there appears to be great differences in the actual preparation for the IQMS evaluation process across schools with varying resource capacity. Well resourced schools provided adequate to good preparation for teaches to engage in the IQMS process, while schools with poor resources provided poor preparation for teachers to implement the IQMS evaluation process. This suggests that the level of training received by teachers was dependent

upon the level of resources that were available to the schools, to the extent that those schools with less or no resources were passive recipients of information. This divergence of training may have serious implications for the validity and reliability of the IQMS process and results.

#### **4.3.2 Concerns raised by teachers as result of their experiences of going through the IQMS process**

Teachers were requested to reflect on their experiences of the IQMS evaluation process with a focus on things that they thought could be changed or developed further. Arising out of their reflection, the majority of the older and more experienced participants (90% of the relatively experienced teachers) indicated that planning, recording and record keeping were the areas that they needed to be further developed in. They felt that *class visits should be cancelled and that, they were against a panel approach and recommendations* suggesting that *the evaluation and the recommendations should be done only by a senior staff member of the school*. However, this view was not shared by younger and lesser experienced participants. The majority of younger and lesser experienced teachers (97% of those teachers considered relatively inexperienced) were positive in their reflections, indicating that *IQMS strengthened human relations and that IQMS contributed to the school development*. They however, expressed the view that *IQMS should first focus on holistic development followed by staff development and lastly on building commitment and confidence*.

Almost all the younger and lesser experienced participants (100%) mentioned lesson planning and preparation, learner assessment, recording, floor space, professional development in the field of work, human relations and contribution to school development as things that required special attention and development through the IQMS system. More qualified , experienced and older teachers (88%) thought that the

process as a whole needs development as it was too involved, stating that *it is time wasting*, and feel that only the young and lesser qualified teachers should undergo IQMS evaluation. Furthermore, they believed that *being adults, more qualified and more experienced, IQMS evaluation should not be meant for them*. It is thus apparent from their views that they don't subscribe to the role of life long learner as outlined in the Norms and Standards (2000) document on the roles of teachers.

With respect to class visits by the evaluation team, the majority of the older and experienced participants (98%) felt that the DSG's *visit was just a waste of time and intimidating especially to learners*. They felt that *the people that should conduct the evaluation should be experts who have been scientifically proven with vast experience in the field*. Their view is *that class visits should be scrapped*. In contrast, most of the younger and less experienced teachers (93%) stated that they *were very happy with class visits and that class visits were exciting to them and also to the learners*. Furthermore most of them (96%) were calm because they were used to all the members of the DSG and knew what they were there for.

The analysis suggests that teachers' biographies influence the identification of areas of concern about the IQMS process. Older teachers tend to not want classroom observations. The reasons for this observation were beyond the scope of this study, but could be the subject of future studies. Furthermore, the analysis suggests that younger teachers are concerned with more holistic development. Once again, the reasons for this were beyond the scope of this study and could be the subject of further studies

#### **4.3.3 Teachers feeling about their rating scores on IQMS evaluation**

The majority (81%) of the participants who are experienced and from secondary schools ticked "no" for the part of the question that asked respondents about the fairness of the evaluation report that was produced by the evaluation panel.. To support their answer they stated that *too many marks are allocated unnecessarily to cover up*

*incompetence on the part of the panel. They also said that panel's report is useless as the appraisee sits together with the panel to discuss the scores, and at the end of the day the panel gives the appraisee what they agreed on with the appraisee having the final word. Their argument is 'how can someone be a referee and a player at the same time?' This view differs with most of the less experienced and primary schools participants (90%) as they ticked the "yes" response to this question indicating that they believed that the evaluation report was a fair reflection of their evaluation . They supported their answer by stating that everything is transparent, the panel together with the appraisee discusses everything and reasons are given in respect of the panel's particular score. Inexperienced participants were of the opinion that the panels' evaluation report offered them an opportunity for introspection and they have gained some knowledge from the exchange of ideas. They felt that panel's evaluation report fosters a climate for collaboration and teamwork.*

This section of the analysis suggests that the experiences of the teachers in respect of IQMS evaluation ratings varied, often dichotomous and there is clear indication that the differences of experiences are related to school resources, teachers' qualification levels and teachers' teaching experience.

#### **4.4 SECTION C: The impact of the IQMS process and evaluation report on teachers**

This section of the analysis focuses on the post – evaluation issues within schools. It explores teachers' views on the evaluation process after having gone through an evaluation cycle and reporting on the evaluation held. While there were some clear patterns emerging, in general the post –evaluation report did have an effect on all the teachers.

##### **4.4.1 IQMS as a stimulus for further teacher professional development**

The majority (89%) of the more qualified and older teachers felt that, *IQMS was a demotivator and it had not impacted positively in terms of personal and professional growth*. They also said that IQMS evaluation makes the teacher go through the process for the sake of getting only 1% salary increase and nothing more. They were of the view that nothing had changed as yet, quality was still poor and it had again proved to be a failure. They said that *IQMS evaluation was disrupting schools as there were too many meetings*. By contrast, the younger and lesser qualified teachers felt differently, as they said that *IQMS evaluation helped them in the sense that it keeps the educator abreast with the changes in the teaching and learning practices*. They also get to know their colleagues better and create a platform for discussions about their job's difficulties.

With respect to the teachers' expectations of the IQMS and its relation to post-evaluation views, the majority of the participants that were 40 years and younger stated that, *their expectations were met, mentioning that through IQMS evaluation they were able to identify their strengths and weaknesses and were assisted to overcome their weaknesses*. They also said that *their schools and the department of education managed to provide them with resources; they were able to share ideas with their colleagues, they are more confident and their teaching had improved and are enjoying it*. Before evaluation, the participants that were 50 years and older voiced the opinion that they were expecting IQMS evaluation to fail, giving reasons such as:

*The panel was not truthful as scores given to the teachers were not the true reflections of the teacher's performance, as evaluation was done by peer and friends,*

*IQMS evaluation is a futile exercise and time consuming as there are too many meetings that led to the disruptions of teaching and learning at schools,*

*uneasiness to know that you are going to be evaluated and your faults will*

*come out, and the panel is intimidating.*

However, *after* evaluation they felt differently. All of them indicated that their perception about IQMS evaluation had totally changed and said that they were expecting IQMS evaluation to contribute to the holistic development of their personal and professional life.

The data and commentary presented above suggests that the IQMS system of evaluation does have a stimulus role for promoting teacher professional development albeit difference in what it could lead to for particular groups of teachers.

#### **4.4.2 Potential professional development outcomes of IQMS evaluation process**

Post the evaluation report, it was no surprise that the majority (98%) of the lesser qualified participants saw the need to upgrade themselves and felt the need to enroll for upgrading teacher development programmes, such as the National Professional Diploma in Education (NPDE). Most (78%) of the 50 years and older teachers saw the need to engage themselves in professional development activities and were demonstrating willingness to acquire new knowledge and additional skills. 72% of the experienced participants saw the need to attend INSET courses and were receptive to alternate viewpoints, they were now prepared to try new teaching methods and to evaluate their success.

In summary, the IQMS evaluation report had a positive impact on teachers in general, in terms of them identifying a need to develop themselves professionally. Some needed to upgrade their qualifications, whilst others saw a need for continuous professional development.

Teachers indicated that there need to be several changes in their teaching, planning for teaching, professional development as a teacher and school organization as a result of the IQMS process and the evaluation report. These changes are recorded hereunder,

some recorded as preferred changes and some that have been implemented:

- I. All the participants (100%) agreed that teachers should create a positive and suitable environment that enables the learners to participate actively and achieve success in the learning process. All the participants (100%) agreed by saying that teachers should motivate, acknowledge, stimulate and promote respect for individuality and diversity.
- II. In terms of planning for teaching, all the participants (100%) said that teachers should plan together and should use learner centered techniques that provide for acquisition of basic skills and knowledge and promotes critical thinking and problem solving.
- III. On the professional development as a teacher, majority (88%) of the participants thought that teachers should participate in activities which foster professional growth and try new teaching methods. Most of the participants (94%) also thought that teachers should stay informed in their field by reading or participating in conferences and training opportunities. Majority of the low qualified teachers (95%) said that teachers should participate in professional bodies, namely: trade unions, learning areas associations and should improve their qualifications. The majority (87%) of more qualified participants acknowledges that IQMS support and motivate the staff members in their professional growth which result in the improvement of job performances as well as the level of personal satisfaction. Most (77%) of the female participants said that IQMS brought about the improvement in human relations and communication improved. 65% of the 50 years and above participants said that IQMS built teachers' confidence and allowed for constructive criticism among teachers and allows for self improvement.
- IV. In terms of the school organization, 75% of the participants who are more experienced said that IQMS has brought about systematic stake holder consultation through functioning structures and has provided opportunities for the

meaningful participation. All the participants (100%) from poorly resourced and no resourced schools said that more teaching and learning resources are now available and IQMS has encouraged teamwork among the staff members.

Having recorded their views of changes that should unfold within their schools, respondents indicated that *some recommendations on the evaluation report were initiated*. They were, however scant on what these initiatives were, most indicating that *more workshops and training on IQMS were organized at their schools with the assistance of the experts*. There is a clear indication that, the IQMS process and evaluation did have some impact on individuals and the school.

All the participants (100%) responded by saying that more workshops and trainings on IQMS were organized at their schools with the assistance of the experts.

The majority (98%) of the less qualified participants said that they have registered for the NPDE programme as to improve their qualifications. 97% of the experienced participants now acknowledge that they have strengths as well as weaknesses and said that they have asked for development in those areas that needed improvement. 64% of the older participants from 41 years and older indicated that they have changed the way they view trade unions and have joined them and are actively involved. In respect of the participants that were 50 years and older their perception about IQMS 'being the tool to get them out of the system has changed', and 100% of them had registered for the ABET programme so as to arm themselves after retiring.

#### **4.5 SECTION D: School managers' views of the IQMS process**

In order to obtain a holistic understanding of the IQMS evaluation implementation at the site of school, it became necessary to interview school principals or their delegates that were responsible for taking forward the IQMS process within their schools, in order to get a management perspective. Three participants were interviewed in terms of the scope of the research, namely one from the large school in terms of learner and teacher

enrolment, secondly one from the small school and lastly from the single sex school. This sampling was done to see if ever there were any variations in the way a sample of the different kinds of schools that exist in South Africa, conducted IQMS evaluation process. Their responses are presented and analyzed, and significant differences in responses are reflected.

#### **4.5.1 School management perspective on the preparation for implementation of IQMS: The relationship between training and implementation**

From the school managers' perspectives, all three respondents indicated that training workshops were conducted in their respective schools. All staff had participated in these workshops and the workshops were guided by their interpretation of the policy documents and guidelines provided by the Department of Education. In addition to the workshops, schools had developed staff development teams (SDT) and Development support groups (DSG) to take forward the evaluation process.

Two of the school managers who attended training workshops from the Department of Education, after going through the IQMS evaluation in their respective schools felt that they were no longer sure about the IQMS system and processes. This is because they thought that the education and training about the IQMS they had received from the department was the right thing, but when the evaluators came there were a lot of uncertainty on the part of the staff and school management. The evaluators presented different views about the IQMS evaluations from that which the managers were taught and trained and upon which they cascaded the information to their school staff. The other participant, who did not attend any Departmental training sessions on IQMS, felt that the IQMS evaluation preparation processes were inadequate.

In both instances, there seems to be problems in the interpretation and implementation of the IQMS evaluation system by the various players in the evaluation process. Interpretations by individuals are often varied depending upon who the individual is and

how much and what kinds of information are available to that individual. Hence it is expected that different expectation from different individuals will be a feature of the system, and one way to mediate this is through the consultation process that is in-built in the IQMS system of evaluation when the preliminary evaluation report is discussed with the school teachers and managers. This opportunity gives scope to address the different interpretations that may have emerged through the evaluation process.

Post evaluation, all the school managers expressed some levels of dissatisfaction on the IQMS process.

The first participant stated that although they had received a workshop, he felt this whole process require more than just one workshop and they need time to familiarize themselves with the process and understand it. To some parts of the evaluation report he indicated that he does agree because they are still not familiar with the IQMS.

The second participant felt that the evaluation was not satisfactory because they thought they had done everything accordingly but the report stated otherwise. She indicated that the fault is not on them but on the Department because they are the ones who need to understand the process clearly and conduct thorough workshops and training for teachers.

The third participant felt that if only the Department of Education could provide all the teachers with the necessary documents and not only the principals then teachers can be able to read, and be able to ask questions for clarity purposes. He also indicated that he does agree with the evaluation because most of the things mentioned were due to the fact that they did not all have the documents and were expected to conduct the workshop themselves using only document copies read by the principal.

On reflection, school managers felt that their training on IQMS was inadequate and that this might change as they go through more cycles of evaluation. Further, they would like to see that documents on IQMS be given to every teacher so that every teacher can

be able to read and question some of the things in the documents. Lastly, they felt that the timing of the IQMS should commence towards the beginning of the academic year in each school leading to the actual evaluation being done towards the latter part of the year so that when the time for evaluation comes they would have ironed out all the creases.

The analysis here suggests that training alone is inadequate for implementing an evaluation system at the level of schools. There needs to be an iterative process between training and implementation so that future evaluation processes can be better informed.

#### **4.6 Concluding remarks**

According to the data collected from teachers who had gone through evaluation, IQMS has an important role to play in improving the teaching and learning process. Through evaluation teachers were able to say that they were now prepared to plan together, share ideas on how to improve the areas identified by their DSGs that needed development as an improving of their teaching. Different structures and committees were introduced like Staff Development Team, disciplinary committee, bereavement committee and subject committees came into being and the relationship between the teachers themselves and School Management Team improved. Thereby building collegiality. Some teachers were even prepared to register in certain programmes in order to improve their qualifications for the future educational challenges in the education sector. IQMS evaluation helps the teachers to view themselves as the agents of change in their schools. Drawing from the views expressed by the participants, it can be seen quite clearly that IQMS evaluation has impacted positively on the school functioning as well as on individual teachers personally and professionally. Looking at what teachers have said, one can conclude that IQMS as the evaluation tool for teacher performance allows for the enhancement of the quality of education.

## **4.7 Chapter Summary**

Chapter 4 presented the data and the analysis that was aligned to the research questions. Clear outcomes of the analysis were presented as findings. How the data was collected, presented and analyzed. Results were highlighted for the purpose of advancing a discussion and analysis. Participant analysis in this project was also provided- meaning.

The next chapter, chapter 5 will conclude the thesis with some insights from the study.

# CHAPTER 5

## SUMMARY OF FINDINGS, CONCLUSIONS AND RECOMMENDATIONS

### 5.1 INTRODUCTION

This study primarily looked at teachers' experience of the IQMS evaluation and its impact on their personal and professional lives. To reiterate, IQMS has been actively introduced at the school system for the last five years. This study hoped to contribute to the literature on what have we learnt from this form of school assessment? The purpose of this study is two fold. Firstly, this study wants to explore the outcome of IQMS within the school context with a specific focus on outcomes related to teachers. Secondly, this study wants to document the experience of schools' trip through the IQMS process from the perspective of teachers and the school managers.

Chapter four presented the data produced through a survey methodology together with the analysis thereof. This chapter concludes the research report by providing a summary of key findings from the analysis of the data. Further, this chapter makes recommendations to the Department of Education for improvements to the IQMS process of school evaluation and to researchers for further research in the areas of school evaluations and teacher professional development based on these key findings.

### 5.2 SUMMARY OF KEY FINDINGS

The following summarized key findings of this study have been identified through the analysis of the data:

- Teachers with lower teaching qualifications and teaching experiences perceived IQMS to be beneficial to them while teachers with higher qualifications and longer teaching experience were suspicious of the IQMS process.
- Younger teachers tend to have more positive feelings towards IQMS while older teachers tend to have negative feelings towards IQMS. Middle aged teachers tend to have mixed feelings towards IQMS.

- The data analysed suggests that the level of training received by teachers were dependent upon the level of resources that were available to the schools.
- Analysis of data reveals that the experiences of teachers related to IQMS varied, often dichotomous and that there is a clear indication that the differences of experiences are related to school resources, teachers' qualification levels and teachers' teaching experience.
- The IQMS evaluation report had a positive impact on teachers in general, in terms of them identifying a need to develop themselves.

## **5. RECOMMENDATIONS**

The following are some recommendations in relation to this study.

- The Department of Education should ensure that sufficient workshops and training are planned in advance and provision is made for in service training of teachers.
- Competent facilitators and sufficient time should be put aside for quality workshops.
- Quality resources will ensure that quality teaching and learning is achieved. Quality education can only be possible if the Department of Education ensures that all schools are well resourced.
- Teachers themselves should contribute towards improving the quality of education by being active in their unions and coming up with the submissions on how to improve quality in education in schools.
- Policy makers should involve teachers at all stages when designing any policy so that teachers can also take ownership of the policy with a clear understanding of implementation issues.

The IQMS system of evaluations cannot be divorced from the community that the school exists within as issues external to the school do certainly impact on what happens in schools. Hence, further research in this focus area is needed to

- inform school evaluations where the external factors that impact on school effectiveness, like the role of parents and community leaders, the social-economic factors that impact on students learning and other social factors like poverty are explored in relation to school effectiveness.

## **5.6 CONCLUSION**

The aim of this study was to find out about the teachers' perceptions and experiences after evaluation using Integrated Quality Management Systems (IQMS) in promoting Quality Education in schools. The following are the conclusions derived from the study:

- Teachers who participated in this study said that their evaluation using IQMS as a tool benefited them in many ways. They attributed their personal and professional development to the input they received from the IQMS evaluation process. The knowledge, skills and positive attitudes they have acquired through evaluation will assist them in their lives and in their future endeavors.
- Some teachers do not understand the purpose of the IQMS process due to the lack of orientation and proper training. This constitutes an important and urgent need for in service teacher training.

It can be concluded; therefore that IQMS evaluation will contribute to teacher development and the improvement of the quality education in schools.

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FACULTY: EDUCATION

UNIVERSITY OF KWAZULU- NATAL

QUESTIONNAIRE: FOR THE EDUCATORS

Instructions for the completion of the questionnaire: Please tick the appropriate response: Where narrative is required, kindly provide as complete details as possible.

The purpose of this questionnaire is to gather information on IQMS evaluation from the teachers who have gone through the evaluation exercise at their school. The information received through this questionnaire will be treated as confidential and will be used for research reporting only.

SECTION A: Biographical details

1. Gender:

Male	
Female	

2. Age

A: 20-30

B: 31-40

C: 41-50

D: 51-65

3. Qualification: (M= Matric)

i. M+0

ii. M+1

iii. M+2

iv. M+3

v. M+4

vi. M+5

vii. M+6

4. Type of school:

Primary	
Secondary	

5. Teaching experience

0-5 years	
6-10 years	
11-15 years	
16-20 years	
21 and above	

6. Please tick the appropriate category that describes your usual place of residence:

Rural	
Township	
City(Urban)	

7. Rank your school description according to the following scale:

- 1= Well resourced
- 2= Above average resourced
- 3= Average resourced
- 4= Poorly resourced
- 5= No resources

Rating: Please tick the appropriate box.

1	2	3	4	5

8. Estimate the number of learners in your school.

Under 500	
Between 501-1000	
Above 1000	

9. Number of teaching staff at your school: .....

SECTION B

This section focuses on your perceptions, thoughts, feelings and expectations about IQMS.

10. Having been exposed to the policy of IQMS, What were initial perceptions about this policy?

.....  
.....  
.....

11. What were the three (3) things you were concerned about the IQMS evaluation?

.....  
.....  
.....

12. What were the three (3) things that you were looking forward towards evaluation?

.....  
.....  
.....

13 What were you initial feeling about IQMS?

[Please tick below]

Positive feeling	
Negative feeling	
Indifferent	

Please explain, why you felt the way you did?

.....  
.....  
.....

## SECTION C

### PREPARATION FOR IQMS:

This section focuses on your experiences of going through the IQMS process: The table below presents the IQMS evaluation process.

Indicate by cross (x) the stages you were involved in, in the IQMS process within your school.

Planning stage	
SDT selection	
Training of the staff	
Selection of the DSG	
Self evaluation	
Pre-evaluation discussion	
Actual evaluation	
Post evaluation discussion	
PGP preparation	
Submission of the evaluation forms to the Department of Education	
Receiving the evaluation report	
Interrogation of the report	

14. What did your school do, to prepare you for the IQMS? (Please list all the activities that your school engaged you in, in preparing you).

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15. Do you think that this process (activities listed above) of information dissemination was:

1.5.1 Appropriate (please explain your answer)

.....

.....

.....

1.5.2 Adequate (pleases explain your answer)

.....  
.....

16. After completing the self –evaluation report form, what were the four (4) things that you thought need development/ change?

.....  
.....  
.....

17. During the actual evaluation process, what were the four (4) things you thought require development?

.....  
.....  
.....

18. Could you please describe your feelings about the class visit by your DSG panel?

.....  
.....  
.....

19. Do you think that the panel’s evaluation report was fair?

Yes	
No	

Please explain your answer:

.....  
.....  
.....

SECTION D

This section focuses on, what happened after the evaluation:

20. What aspects of your perceptions were confirmed through the evaluation process?

.....  
.....  
.....

21. Which of the expectations you had (refer to Section B number 12) were met as the result of the evaluation?

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.....  
.....

22. After getting the evaluation report, what aspect of your professional life as the teacher do you think needs to change?

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.....  
.....

23. As the result of the IQMS evaluation, describe the changes that you thought of or made in:

(i) Teaching

.....  
.....  
.....

(ii) Planning for teaching

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.....  
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(iii) Professional development as a teacher

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.....

(iv) Your school organization

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.....  
.....

24. Describe the activities your school engaged in, to address the issue raised in the evaluation report.

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25. What attempts have you made to promote your growth and development as a professional educator in response to the evaluation report?

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30 November 2009

**TO WHOM IT MAY CONCERN**

This is to confirm that I, Nomagugu Nxumalo have done some editing, that is checking spelling and grammatical errors to the dissertation that was given to me by Michael M. Ngobese. I strongly believe and feel that with my experience of teaching English for the entire thirty years at the Secondary level (Grade 12) and obtaining 90 % and above pass rate for my learners, with English as one of my measure subjects during my training days do qualify to do editing to any document. The following are my academic qualifications:

- Secondary Teachers' Diploma (STD) with English as my specialization subject
- Higher Diploma in Education (HDE) measured in English
- BA degree with English as one of my measure subject.

Yours faithfully

.....  
G.C. NXUMALO

HEAD OF DEPARTMENT ( LANGUAGES)