... und ich muß mich schon auf eine wunderliche Weise zusammenfassen; denn ich finde auch hier leider gleich das, was ich fliehe und suche, nebeneinander.

J.W. Goethe - 1786

Teacher Development and Change:
An Analysis of a School-Based Action Research Staff Development Programme

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ABSTRACT

This study explores the practical and theoretical implications of adopting action research as an approach to the in-service development of teachers in South Africa. The study is based on an analysis of a particular school-based teacher development programme.

The background to the study is provided by an account of the historical development of education in South Africa and how this has impacted on teachers. The particular context of the KwaZulu-Natal midlands region, which has a long history of political conflict, is highlighted and its effect on schooling examined.

The conceptual design of the Midlands Education Development Unit's school-based methodology programme is based on a modified educational action research cycle. Drawing on the writer's experiences, fieldnotes, interviews and detailed documentation, the programme's design and implementation is described for the period January 1991 to December 1992 (see Appendix A for a list of interviews). The description of the course of the programme from the perspective of the unit provides a basis from which both the practical and theoretical possibilities and difficulties of this model of teacher development are explored.

The programme's effectiveness was limited by a number of contextual factors. These included the legacy of deliberate under-resourcing during the *apartheid* period, the direct impact of the violence in KwaZulu-Natal, the highly hierarchical organisational structure of the schools, as well as the willingness and commitment (or lack thereof) of the teachers to

change. These factors all impeded the development of a teacher-led action research cycle within the schools. The appropriateness of action research as a strategy for teacher development within the South African context is questioned.

The central theoretical concern of the study is the claim by some of its advocates that action research is an emancipatory form of research and development. It is argued in the study that this claim is based on a misreading of the work of Jürgen Habermas which leads to an obscuring of the power relations at play within the action research cycle. The potential consequences of this misreading, as well as alternative strategies are explored.

DECLARATION

I hereby declare that the whole of this thesis, unless specifically indicated to the contrary in the text, is my own original work.

Volker Ralf Wedekind
December 1995

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Finally, but by no means least, I would like to thank my parents, family and friends and especially Jean Dyson for love and support over the years.

Without all of the above, this would not have been possible.

The financial assistance of the Centre for Scientific Development is herewith gratefully acknowledged. The findings and opinions expressed in this dissertation in no way reflect the opinions of the CSD.

ABBREVIATIONS AND TERMINOLOGY

South Africa has often been described as a land of acronyms. The following abbreviations and acronyms are used in the text with some frequency. Where the abbreviation is an acronym it is spelled in the lower case. Uppercase indicates that the individual letters are pronounced.

ANC	African National Congress
Atasa	African Teachers' Association of South Africa
B.Ed	Bachelor of Education
CAE	Centre for Adult Education, University of Natal, Pietermaritzburg
Care	Centre for Applied Research in Education
Casme	Centre for the Advancement of Science and Mathematics Education
CNE	Christian National Education
Cosas	Congress of South African Students
Cosatu	Congress of South African Trade Unions
DEC	Department of Education and Culture, KwaZulu
DET	Department of Education and Training
DNE	Department of National Education
EduPol	Education Policy Research Unit, Urban Foundation
FP	Fundamental Pedagogics
GNU	Government of National Unity
HDE	Higher Diploma in Education
HOD	House of Delegates
HOR	House of Representatives
HSRC	Human Sciences Research Council
IFP	Inkatha Freedom Party
Inset	In-service education and training
ISS	Ideal Speech Situation
M.Ed	Master of Education
Medu	Midlands Education Development Unit

Naptosa	National Professional Teachers' Organisation of South Africa
Natu	Natal African Teachers' Union
NCE	Natal College of Education
NECC	National Education Co-ordinating Committee
NED	Natal Education Department
Nehawu	National Education, Health and Allied Workers' Union
Nepi	National Education Policy Investigation
Neusa	National Education Union of South Africa
NGO	Non-governmental organisation
NSOE	'New' sociology of education
Nusas	National Union of South African Students
Preset	Pre-service education and training
Resa	Research in Education in South Africa
RDP	Reconstruction and Development Programme
Sadtu	South African Democratic Teachers' Union
SEP	Science Education Project
SRC	Students' Representative Council
Tops	Teacher Opportunity Programmes
UDF	United Democratic Front
Unisa	University of South Africa
UNP	University of Natal, Pietermaritzburg

Terminology and Race

Because of the *apartheid* system's emphasis on racial classification, reference to race is both unavoidable and fraught with difficulty. It is therefore necessary to include an explanation and a disclaimer at the outset.

Use of racial classification does in no way indicate an acceptance of, or support for a system that defines people according to features, place of origin or colour of their skin. For this reason I have decided to signal my discomfort with the cumbersome mechanism of inverted commas around all terms of racial classification.

Terms such as white, coloured and black, African, Indian or European are not only inaccurate, but also politically loaded. In South Africa it has become convention to adopt the black consciousness formulation and regard 'black' as a political category constituting all people that are not white. Thus black includes Africans, coloureds and Indians. This obviously problematic formulation is less frequently used in daily intercourse, and black is often used synonymously with African.

African too is problematic as it is often argued that whites, Indians and coloureds have every right to refer to themselves as African. The difficulties with terms such as Indian and coloured are legend.

In this thesis all terms are regarded as problematic, but in order to make sense of education today one must understand the legacy of a system of race classification and racial discrimination based on that classification. Thus the reader will encounter racial categories as designated under *apartheid* where they assist in the task of explaining.

CONTENTS

ABSTRACT 3
DECLARATION 5
ACKNOWLEDGEMENTS 6
ABBREVIATIONS AND TERMINOLOGY 7
CONTENTS 10

PREFACE 14

INTRODUCTION 18

SECTION ONE

CHAPTER ONE:
AN OVERVIEW OF EDUCATION IN SOUTH AFRICA
Introduction 21
The Nationalist-Conservative School 23
The Liberal School 25
The Radical School 27
People's Education 29
The Policy Debate 34
After Policy? 36
Conclusion 39

CHAPTER TWO:
THE TEACHER, TEACHER ORGANISATIONS, AND SOUTH AFRICAN EDUCATION
Introduction 40
The Social Class Position of Teachers 41
Teacher Organisations: Reform and Resistance 42
Teacher Training in South Africa 48
A Statistical Postscript 51

CHAPTER THREE:
SCHOOLING IN KWAZULU-NATAL
Introduction 54
Administration of 'Black' Education in Natal and KwaZulu 54
KwaZulu and Inkatha 55
Teaching Conditions 57
Schooling and Violence in KwaZulu-Natal 59
Teacher Organisations 61
Educational Transformation vs Political Transformation 63

CHAPTER FOUR:
THREE PIETERMARITZBURG SCHOOLS
Introduction 65
School A 66
School B 68
School C 69
Conclusion 70

SECTION TWO

CHAPTER FIVE:
IN-SERVICE EDUCATION AND TRAINING IN SOUTH AFRICA
Introduction 72
Inset Provision by the State 73
Department of Education and Training 74
Department of Education and Culture, KwaZulu 77
Financial commitment by the state 79
Inset Provision by the Non-Governmental Sector 79
University-based inset programmes 79
Independent inset programmes 80
'Progressive' organisations *80*
Corporate-funded NGOs *82*
Inset Policy 82
Conclusion 85

CHAPTER SIX:
THE MIDLANDS EDUCATION DEVELOPMENT UNIT
Introduction 87
Background to the Unit 87
Programmes of the Unit 88
Staffing 88
Resource provision 89
Teacher development programmes 89
Dialogue programmes *89*
Informal education *91*
Organisational Form 92
Accountability and 'The Community' 93
Conclusion 96

CHAPTER SEVEN:
ACTION RESEARCH AND TEACHER DEVELOPMENT
Introduction 97
The Historical Roots of Action Research 97
Development of a Theoretical Basis for Action Research 99
Action Research and People's Education in South Africa 100
Conclusion 103

SECTION THREE

CHAPTER EIGHT:
BACKGROUND TO THE SCHOOL-BASED TEACHER DEVELOPMENT PROGRAMME 105

CHAPTER NINE:
A CONCEPTUAL DESCRIPTION OF THE PROGRAMME
Introduction 110
Programme Design 110
Action Research 111
School-Based Teacher Development 113
Conclusion 114

CHAPTER TEN:
DESCRIPTION OF THE PROGRAMME
Introduction 115
Year One: The First Cycle 116
Year Two: The Programme Expands 127
School A 130
School B 132
School C 136
Evaluation 138
Consultation 139
Plans for 1993 140
Conclusion 143

SECTION FOUR

CHAPTER ELEVEN:
ANALYSIS OF THE METHODOLOGY PROGRAMME
Introduction 145
Contextual Factors 145
Control 147
Teacher Commitment 150
Differing Visions 152
Action Research 153
Conclusion 155

CHAPTER TWELVE:
ACTION RESEARCH: A THEORETICAL CRITIQUE
Introduction 156
Habermas, Communicative Action, and Action Research 156
The ideal speech situation 157
Psychoanalysis and communicative action 159
Power relations in the speech community 160
Action Research and Educational Change 161
Postmodern Critique 163
Reinserting the Dialectic 164
Conclusion 165

CONCLUDING COMMENTS 167

APPENDICES 169

REFERENCES 185

PREFACE

The period that I intend discussing in this dissertation has been at once fascinating, frightening and liberating for South Africa as a whole and for me personally. It seems to me essential that I locate myself within this context at the outset, yet that is no longer a simple task. Three years ago, in a similar preface to a long essay written for my Bachelor of Education degree, I confidently stated, "that I believe a Marxist analysis provides the most useful tool for understanding South African society and education." I can no longer speak as confidently.

At the beginning of the period covered by this study I was convinced that an emancipatory educational project was possible, and indeed I believed I was involved in one. Now I find that question marks hang over everything I once believed. The reasons for this are complex and not solely a consequence of this study - the impact of the collapse of the Soviet Union and the loss of an alternative to the capitalist west, no matter how flawed; the impact of post-structural theory and the debates about modernity and post-modernism; the debates (particularly within feminist theory) about representation; the rapid changes that have taken place in South Africa with all the stress inevitably associated with change. All of these factors and many more have played a part in bringing on the uncertainty I mentioned.

This uncertainty, however, is a positive thing. I have learned much in the past four years and have approached ideas with fewer preconceptions. Nevertheless, the uncertainty has been debilitating in some respects. In a society which has been so skewed along race, class and gender lines, it has been increasingly difficult to speak for or about anyone without being challenged about ones right to do this. Research and the researcher are often regarded with justifiable suspicion by the subjects of the research and outside critics. The interests served by the research do not always coincide with the interests of the subjects (objects?) of the research project.

Action research, which is one of the central foci of this dissertation, is advocated as a research methodology which overcomes these difficulties. Whether it can be used effectively to do this is central to the last chapter of this dissertation. However, there are other issues

which arise out of this methodology, primarily the fact that I was central to the teacher development programme that is being examined. To a large extent I conceptualised it, and was responsible for its implementation. There is thus a danger in so far as it could be argued that I do not have sufficient distance from my own work in order for me to examine it critically. Many of my own criticisms of action research in the classroom could equally be pointed at this study. It is, after all, a critical reflection on my own practice.

To overcome this I have attempted to use a number of strategies. I have as far as possible not relied entirely on my own observations but have attempted to triangulate the data. I recorded and transcribed both the workshops that I was involved with and some of the interviews that I held with members of staff, as well as group evaluations. I discussed the programme with other members of the unit who occasionally sat in on the workshops. I have referred to their notes in my assessment of the programme.

Most importantly, I believe, I have attempted to deepen my understanding of the complex issues involved by reading and discussing educational theory with my colleagues, students and members of the department.

The traditional conventions for academic writing tended to encourage an avoidance of the first person in the text. While I would reject any pretence at objectivity, I have chosen ultimately to distinguish between myself as the Teacher Development Fieldworker, and myself as researcher. I thus refer to my own part in the programme in the third person. I do this partly out of respect for the convention (and to improve the readability of the text), but primarily to signal that the narrative of the events (even where I was centrally involved in them) can never be anything more than a re-presentation. Obviously, my direct involvement in the process gives me a particular perspective on events, but I cannot and do not wish to claim any privileged position for my version. It can never be anything other than one version amongst a number of possible interpretations. Indeed, other participants on the programme could in all likelihood give quite different accounts.

I was particularly alerted to the difficulties of doing research by the complex debates which have raged amongst South African feminist researchers and activists in the last few years (see

Campbell, 1993; Fouché, 1993; Funani, 1993; Kemp, 1993; Sunde & Bozalek, 1993). Central to these debates were issues of representation and difference: can one woman represent another who is different? Clearly this debate extends beyond the realm of gender to the very core of intellectual production. In my case, can I represent the participants in the programme, or even represent the course of the programme?

A strong body of opinion amongst the 'black' feminists involved in the debates (Funani, 1993) hold that 'white' women could not adequately represent 'black' women. Inherent in that argument lies a belief that 'black' researchers could authentically represent 'black' women. Reactions to this brought in the dimensions of difference along class and gender, rather than racial, lines and as the debate developed I increasingly found my own position untenable. A young 'white', middle-class, German and English speaking man with no long term experience of working in a 'black' school, doing research on a programme whose participants were primarily Zulu speaking women and men who were usually older, and who had a set of experiences vastly different to my own.

Amanda Kemp, an "African-American, née black, née coloured, née negro, née woman" (Kemp 1993: 25) and an actress, cut to the core of the dilemma in her discussion of criticism by lesbian activists of her decision to perform a play based on the autobiographical material of Audrey Lorde. Kemp is heterosexual and Lorde was a lesbian. The lesbian activists felt that a heterosexual could not represent Lorde adequately because she had not experienced being a lesbian.

Kemp's response is twofold: that the necessary endpoint of this argument serves ultimately to marginalise the voices that need to be heard because no one will represent the most marginalised sectors of society (an issue eloquently taken up by Gayatri Spivak, 1988). Kemp argues that "avoiding the texts of those who are different actually reinforces the status quo" (Kemp, 1993: 27).

Secondly, Kemp argues that it is impossible to do anything other than "re-present". No matter how much one has in common with a person, one can never be that person. Her critics were accusing her of inauthenticity because of her lack of experience. For Kemp,

"authenticity is a sham. Every time you quote someone, you are re-presenting that person" (p.27). Crucial is a recognition of, what Kemp calls boundary crossing. She argues that we must recognise and acknowledge our privileged position which enables us to be the re-presenters.

> Dishonesty comes into the picture when we deny that we are crossing boundaries... Dishonesty comes into the picture when we don't challenge the privilege that enables us to be re-presenters, when we leave the power relationships unchanged in our actions. If I have the power to re-present and don't use that power to critique the imbalance of power, then I have not engaged that difference with integrity... The key is to acknowledge that you are travelling, that you are not striving for authenticity but honesty (p.28).

In this dissertation I have attempted to re-present myself, my work and that of others. I have tried to be as honest as possible!

Volker Ralf Wedekind

INTRODUCTION

On 1 April 1995 the various racially divided education departments within KwaZulu-Natal (and indeed in the country as a whole) formally ceased to exist and became part of the new provincial education authority. A month earlier the National Education Co-ordinating Committee (NECC), an organisation which had been at the forefront of the struggle against *apartheid* education and the initiator of the concept of people's education, formally disbanded. These events marked a symbolic end to a long history of a divided and divisive schooling system. The change in structures does not just signal the end of a part of our history, rather it marks the beginning of a long process of undoing, adjustment and rebuilding. Much of the struggle around education in South Africa has been linked to the obvious disparities in provision of educational resources to the various 'population groups' in South Africa. A less quantifiable, and therefore less obvious terrain of change operates at the level of the curriculum and its practical implementation and negotiation in the classrooms of South Africa. This study focuses on this level, specifically exploring the possibilities and challenges of transforming the teachers who will be central to the implementation of the new education dispensation.

Education was and remains a highly contested terrain in the struggle for political control in South Africa. It is seen by the entire spectrum of political thought as central to the future of the country as a whole. Within this debate, few would deny the central role of the teacher in the education system, yet very little research has been undertaken to establish how teachers are going to be able to adapt to the changing educational situation.

Undoubtedly all teachers will be facing a great many challenges. All indications point to major changes not only in the structures, and for some the composition of their pupil body, but also in the aims of the curriculum, the methods used in the classroom and the relationship between teachers and their pupils. Teachers will need support and ongoing training if the stated aims of the democratic government are to be achieved in South African schools.

With this context in mind, this study endeavours to explore the possibilities of a school-based teacher development programme providing the motor force for change in schools. To assess

the potential for such programmes, a case study of a school-based teacher development programme run by the Midlands Education Development Unit (Medu) at three secondary schools over a two year period will be examined. Given the crisis in education in South Africa generally and the specific difficulties facing the Msunduzi (formerly Greater Pietermaritzburg) region, this dissertation attempts to establish whether such a programme presents a viable strategy for teacher development. Further, it seeks to establish whether the methodologies used, namely a form of action research, do in fact offer possibilities for real transformation of the classroom environment.

The programme needs to be seen in the context of the debate about education in South Africa. A brief overview of these debates is provided in the first chapter of Section One. While many general lessons may be learned from the programme, the specific dynamics of Pietermaritzburg and of the school need to be borne in mind. These are explored in the second half of Section One.

Section Two examines Medu in terms of its developmental strategy and its own ideological roots. This is followed by a brief background to the Methodology Programme.

Section Three examines the programme in some detail, outlining its theory, describing the actual implementation, and then critically evaluating it. The focus is primarily on the use of action research as a means to achieve teacher development, particularly in the light of the broad definition outlined above.

The dissertation concludes by examining the potential for such a staff development programme to address some of the development needs that have been highlighted above. This is done by examining the programme in terms of the pragmatics of implementation given the context in which school-based teacher development was being attempted. The analysis moves on to a theoretical exploration of the underlying principles, and suggests that the basis of action research is theoretically flawed.

The concluding comments do not provide a final conclusion, but suggest ways in which issues explored in this study could be further developed.

SECTION ONE

CHAPTER ONE

EDUCATION IN SOUTH AFRICA

Introduction

Any discussion about educational initiatives in South Africa needs to be located within its historical context - a country that has had to contend with over three hundred years of colonialism and the peculiarity of the last forty-five years in which the system of *apartheid* was implemented. The consequences of this history for education are enormous. The legacy of these policies constantly impacts on any educational endeavour and continually needs to be taken into account. A detailed history and analysis has yet to be written and it will not be attempted here. For the purposes of this study, a brief historical overview followed by a discussion on the differing interpretations of that history will have to suffice.

As Peter Kallaway points out,

> any consideration of South African education has to take account of the conservative nature of available secondary sources and the current state of educational research which offers a paradigm case of academic colonialism. This work is also often located uncritically within the cruder versions of South African historiography... and is at times blatantly racist (Kallaway, 1984b: 3).

Although a number of general works (Christie, 1985 and 1991 (revised); Nasson and Samuel, 1990; Nkomo, 1990; Alexander, 1990; Unterhalter, Wolpe *et al*, 1991a & 1991b; Cross, 1992; Hartshorne, 1992) have been published since Kallaway's comment, there remains a dearth of analytical literature which traces the history of education, and particularly 'black' education, in South Africa and locates it within the broader political economy of the country.

There is a tendency amongst educationists, particularly those who were actively involved in the process of contestation, to locate the roots of the crisis in 'black' education in the coming to power of the National Party in 1948 (see Nzimande & Thusi, 1991: 2). While many of the manifestations of the current crisis can indeed be laid squarely at the door of the previous regime, this view tends to attribute the failure of 'black' education to racial policies and does

not analyse the far more complex role education has played, amongst other things, in the development of a particular form of capitalism in South Africa and how that peculiar racial-economic system impacted on education. At a different level, a racial analysis also fails to explain the symbolic power of education as a panacea to all the social ills that people experience on a daily basis. In order to begin to unravel the complex role of education in South African society it is necessary to trace the crisis back to the origins of schooling in South Africa.

The first formal school was reportedly established in 1658 at the Cape, specifically for the newly-arrived slaves (Molteno, 1984: 45). From the outset then, education can be viewed as the ruling group exercising a form of social control over subaltern groups. During the period of the rule of the Dutch East India Company sporadic attempts were made to educate 'Africans', but it was not until the early part of the nineteenth century that a concerted effort was made by missionaries to educate the 'African' population (Nekhuwevha, 1987: 2). From then on, South Africa followed a similar pattern of educational development to most other colonial countries. The Christian mission schools were the pioneers of 'black' schooling in their attempts to Christianise the indigenous people of South Africa. Much has been written about the role of the missionaries in Africa, and South Africa followed a similar pattern to the rest of the continent although the level of missionary activity was particularly intense in Natal (see Majeke's pioneering polemical work, 1952; George, 1989; Pakendorf, 1994). The emphasis of the early mission schools (besides teaching basic literacy to enable 'Africans' to read the Bible) was on basic occupational skills and industrial training "necessary for manual labour for men and domestic work for women" (Nekhuwevha, 1987: 2).

Successive colonial governments placed varying degrees of emphasis on education during the 19th century and slowly expanded the missionaries' schooling system. Although education was seen as an important means of social control (see Harley, 1992; 1994), one cannot speak of state sponsored mass education having been seriously undertaken until the Nationalist government started implementing its *apartheid* policies in the 1950s. It was this infamous policy, that sought forever to damn 'African' people to be 'hewers of wood and drawers of water', which ironically also for the first time gave large numbers of 'African' people access to some form of schooling.

Michael Ashley (1989), Pam Christie (1985), Michael Cross (1986; 1992), and Penny Enslin (1986) all argue that the historiography of education can be divided into three broad schools that they variously categorise as nationalist/ Christian-nationalist/ conservative, liberal/ moderate, and radical/ neo-Marxist/ liberatory-socialist. While categories such as these tend to do violence to the multitude of positions accommodated within them, nevertheless these categories will be used to draw out and discuss the major distinctions between and the developments within the dominant schools of thought in education.

The Nationalist - Conservative School

The nationalist-conservative school is epitomised by the doctrine of Christian National Education (CNE) which emerged in the period 1925 to 1948 as a response to the British anglicisation policies and subsequently became a vehicle for 'Afrikaner' aspirations (Cross, 1986: 186). While the development of CNE itself is fascinating, what interests us here is the logical extension of CNE into the realm of 'black' education. CNE's emphasis on the preservation of 'Afrikaner' cultural and religious identity necessitated separate schooling, initially from the English, and most certainly from 'black' South Africans. The argument for the maintenance of an 'Afrikaner' cultural identity was quickly transferred to thinking about 'black' education, and from the mid 1930s CNE theorists started advocating separate education for 'Africans' which would Christianise within a framework of "a racially genuine Bantu culture" (Nel, 1941 cited in Cross, 1986: 187). This articulated concern for the maintenance of 'African' culture, with the concomitant rejection of liberal assimilationist and ostensibly egalitarian values, was underpinned by a fear that the 'Afrikaner' would be dominated by 'Africans' (1986: 187).

The CNE school of thought continued to develop and came to full fruition when the ideas were converted into state policies after the coming to power of the National Party in 1948. Major developments occurred, particularly at the level of pedagogical theory (a matter discussed in greater detail in Chapter Two).

Christian National Education is still an influential body of thought within educational studies in South Africa today. In 1995, despite minor reforms and the removal of the worst factual

inaccuracies (Bengu, 1994), syllabuses and textbooks continue to reflect the values advocated by the early theorists (Drummond & Paterson, 1991), CNE theories permeate the teaching at the majority of 'African' and Afrikaans universities, and teacher educators draw heavily from the related field of Fundamental Pedagogics[1]. However, CNE has not gone unchallenged, both at the level of its implementation where resistance to bantu education, and to a lesser extent CNE in 'white' schools, has been fierce, and at the ideological level where the other two schools of thought mentioned above have contested the theoretical premises of CNE.

Before going on to examine the other two schools of thought, it is worth noting, firstly, that the CNE tradition has not remained the sole preserve of Afrikaner nationalists. It has won over a number of 'black' educationists who have eloquently defended the theories (see for example Luthuli, 1981 and 1982). Secondly, the concern with the preservation of culture, tradition and language (and the potential for empowerment within this) which remains a central focus of CNE and underpins the separatist argument, has also concerned early communist thinkers such as Lionel Forman (see Forman, 1992; Bunting, 1992) and later black consciousness thinkers (see Biko, 1978; Pityana *et al*, 1992) as well as many conservative liberals. The concerns of these theorists were very different from those expressed by the early exponents of CNE. Nevertheless, the point needs to be made that any direct equation of separatism with racism is overly simplistic and at least some of the concerns of the CNE theorists need to be addressed seriously[2].

---

[1] The largest teacher training institution in the country, the correspondence University of South Africa (Unisa) recently announced that it would revise its education syllabus after racism in the courses was exposed by a local newspaper (*Mail & Guardian*, 1995a; 1995b).

[2] It is worth noting that many marginalised communities throughout the world have identified the need for separate schooling in order to improve their children's life chances. For instance, Native Canadian, Maori, and West Indian (in Britain) communities are all demanding separate schooling because they believe the state system is prejudicial to their children.

The Liberal School

> Nationalist-conservative ideas were from the beginning of the century confronted with an emergence of a vigorous liberal tradition, stressing the importance of African schooling and criticising the policy of "total segregation of Africans" as proclaimed by CNE theorists and other conservative writers (Cross, 1986: 188).

Definitions of liberalism in South Africa vary greatly. The liberal school has become associated with an emphasis on individual rights and personal freedoms as well as a strong conviction in 'the market' as the principal force of social integration. Liberal thinkers, prior to 1948, did explore the notion of parallel ('separate-but-equal') institutions but tended to shy away from total societal segregation. Certainly, it was stressed that the curricula should be uniform in order for the educated 'African' to be integrated into colonial society.[3]

After 1948, when the effects of separation became manifest, liberal thinkers quickly moved away from the parallel approach and rallied to the defence of liberal values. Central to liberal thinking became the need for a strengthening and increase in the size of the 'black' middle class. With the introduction of legislation restricting access to universities in 1959, liberals, particularly those based at the English-speaking universities, began arguing for the right to education and for the benefits of an open university (Cross, 1986: 191).

The 1960s saw a revamped and revitalised liberalism. Cross identifies two factors that precipitated this 'economic liberalism':

> (i) the unprecedented rise of the organic composition of capital during the 1960s and 1970s, followed by considerable changes in the structure and nature of the labour force; and (ii) the influence of human capital theory, associated

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[3] The actual experiences of educated Africans who attempted to integrate with white colonial society were very different. For example, the Christian Kholwa communities of Edendale, Pietermaritzburg, modelled themselves entirely on colonial society. Their villages were laid out in English fashion and they adopted colonial architecture, they dressed in colonial garb and spoke English. During the course of the Anglo-Zulu War they fought alongside the British, many distinguishing themselves at the Battle of Isandlwana. Despite this, they were consistently excluded from colonial society and were ultimately forced to take on a tribal identity and structure in order to gain some recognition under the Native Commissioner (see Meintjes, 1985).

> with modernisation theory, which led to an emphasis on the economics of education. 'Manpower planning' was a central feature of thinking within this school (1986: 192).

The economic boom of the 1960s resulted in a rapid increase in the need for skilled workers which in turn put pressure on the state's educational infrastructure. Despite attempts at alleviating the problem by importing skilled labour, the state was forced to expand education, particularly at the secondary level. It did this, however, without a significant increase in expenditure on 'black' education, which led to ever-worsening material conditions in schools and heightened the resistance to the system - a matter that came to a head in June 1976[4].

Liberal critique of government policy centred on the need for reform in order to avoid damaging the economy. After 1976, many of these liberal voices were drawn into the HSRC's de Lange Commission which presented the government with a technicist solution to the education crisis (see Buckland, 1984). Advocating conservative liberal policies influenced by Thatcherite thinking, the De Lange commission proposed one education system geared primarily to the needs of capital, a suggestion that the government found too substantial a break from the bases of CNE for it to accept at the time.

A decade later, the proposals put forward by the De Lange Commission were finding a new voice in government education proposals (see Department of National Education, 1991a & 1991b). With the debate about a future education system open again and the moral high ground of the radical school in tatters, a "renaissance of liberal democratic thought" has been taking place (Chisholm, 1992b: 143). Volumes such as McGregor's Education Alternatives (McGregor & McGregor, 1992) and Ken Hartshorne's Crisis and Challenge (1992) and James Moulder's Facing the Education Crisis: A practical approach (1992) are representative of a liberal discourse that sees

> change in South African education (as) gradual and negotiated; and that continuity rather than rupture will characterise transition to a new system. The unspoken, absolutely-taken-for-granted, but not unrealistic assumption, is that this change will occur within the framework of the market-dominated economy. In other words, while the elimination of racial inequalities will be high on the agenda of reform, class and

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[4] For an overview of the 1976 student uprising see Brooks and Brickhill, 1980.

gender inequalities, which cut across colour and are a function of the market, will be obscured (Chisholm, 1992b: 144).

Before discussing these recent policy debates about education, it is necessary to trace the development of the radical school which emerged in the late 1970s to contest the liberal school, and which dominated the debate throughout the 1980s.

The Radical School

The 1976 uprising not only forced the state to begin reassessing its policies and strengthened the liberal position, it also spawned a new generation of educational critics influenced by the debates within the 'critical sociology of education' movement in the Anglophone world[5]. These Marxist historians and sociologists sought radically to reinterpret South African education and "uncover assumptions which have informed 'common sense' or 'expert' knowledge on these subjects over time" (Kallaway, 1984b: 1).

Peter Kallaway's Apartheid and Education represented the high point of a debate that had developed amongst a group of historians and sociologists based predominantly at the universities of the Witwatersrand and Cape Town. They saw the liberal educationists' proposals as "irrelevant in the light of new developments" after the 1976 uprising and the 1980 school boycotts (Cross, 1986: 193). In his introduction Kallaway sets out the new perspectives the volume adopts:

- educational policies are to be understood with reference to the needs of the productive and political systems of which they form a part;
- the development of the schooling systems was an aspect of the struggle between owners and workers;

[5] Critical sociology of education here refers to the development of a sociology which opposed the functionalist discourse which had dominated the discipline until the early 1970s. This is a loose definition accommodating a range of theoretical positions. Their major commonality lies in their critical approach to the dominant functionalist discourse.

- the state is no longer seen as neutral, but is held to be the vehicle through which those with economic and political power shape public policy in order to establish a rough correspondence between the products of the schools and the kind of labour required;
- that far from providing a mechanism of social mobility for the majority of students, schools act to crystallise class divisions and preserve the interests of the middle class.

These perspectives were influenced by a Marxist analysis of South Africa's political economy which had emerged during the 1970s (the now famous race - class debate) as well as the 'reproduction debate' in the sociology of education which had been sparked by Louis Althusser's seminal essay on ideology and ideological state apparatuses, in which he argued that schools were central to the ideological reproduction of society (1977). A similar thesis was explored (Bowles, 1977) and developed into what has become known as the 'correspondence theory' by Americans Samuel Bowles and Herbert Gintis (1976). This Marxist inspired sociology was in part a reaction to the "hopelessly naïve" possibilities regarding change embodied in the 'new sociology of education' (NSOE)[6](see Young, 1971) which had gained ascendency in Britain during the mid 1970s (Muller, 1989: 73).

> The NSOE ferment saw South African philosophers, psychologists and especially the revisionist historians like Kallaway and Chisholm taking up some of the strands in the debate, a factor which in a different way rejuvenated educational studies in this country (1989: 74).

In 1980 Richard Levin and Colin Collins published articles applying an Althusserian analysis to the South African context, arguing that *apartheid*, far from being contrary to economic and social integration as the liberal school argued, was in fact designed to produce a

[6] There is a lack of clarity about the exact definition of NSOE. In their introduction to the influential collection, Power and Ideology in Education (1977) Jerome Karabel and A.H. Halsey use a restricted definition referring to the movement centred in Britain which focused on knowledge and its management within the curriculum, in the categories and concepts employed by educators and in the interactions between the various participants in the educational terrain. This movement found its clearest expression in Michael Young's (1971) classic compilation Knowledge and Control. By 1977, Karabel and Halsey were already signalling the demise of the interpretive 'new sociology' under the onslaught of Marxist critique. Writing a decade later from the United States, Philip Wexler (1987) reviews what he terms the 'new sociology of education' as all the work that was critical of the old functionalist paradigm (thus incorporating both the interpretive and Marxist sociology). Others have dubbed this broader category 'critical sociology of education' (see Appel, 1992).

particular type of labour needed by South African capital. The correspondence between bantu education and the needs of the economy was perhaps best articulated by Pam Christie and Colin Collins in their contribution to Kallaway's volume (1984: 160-183).

The correspondence principle was not adopted unproblematically by critics, for as soon as it was applied to the concrete South African situation, contradictions started emerging. Primarily, these concerned the theory's inability to explain adequately the resistance that was increasing in South African schools. Janet Shapiro suggested that there was an inherent contradiction between the function of education and the knowledge provided through it (1981). Others claimed that the correspondence theory had lost sight of the fundamental feature of class society, namely class struggle (Chisholm and Sole, 1981: 115).

A second difficulty that the correspondence theory faced emerged out of the research of economists (Lipton, 1986; Nattrass, 1981; Yudelman, 1983), who argue that, contrary to the belief that *apartheid* served the interests of capital, *apartheid* and

> 'Bantu Education' has, in practice, served certain sectors of capital poorly rather than well; furthermore, schooling has itself become a site of struggle in recent times. Disjunctions such as these have done some violence to the central tenet of schooling as an epiphenomenal feature of the capitalist mode of production (Harley, 1992: 27).

People's Education

From the mid 1980s the debate amongst radical theorists became dominated by the emergence of the concept of people's education. This marked a shift away from attempting theoretically to understand and critique bantu education to an attempt to articulate an alternative philosophy of education which could be translated into action. People's education emerged in the aftermath of the school boycotts of the early 1980s as a means of addressing the deepening divisions and concerns over the lack of schooling taking place (see Kruss, 1988; Wolpe, 1991b). In an attempt to counter the structuralist arguments that there should be no education until liberation had been achieved, the slogan "People's Education for People's Power" was adopted and popularised during the course of 1985 and 1986 when the NECC was launched.

The concept of a people's education demanded a new, and more optimistic assessment of the role of education. The scars of the post 1976 generation who believed that education was simply a form of oppression were beginning to be felt. Large numbers of unemployed and unemployable youth were becoming extremely difficult to accommodate within the anti-*apartheid* struggle. Community structures, with the support of the exiled African National Congress (ANC), called on the students to return to school, and together with teachers, to begin implementing people's education in the schools. People's education was conceptualised as education that:

> i) enables the oppressed to understand the evils of the apartheid system and prepares them for participation in a nonracial, democratic system;
>
> ii) eliminates capitalist norms of competition, individualism, and stunted intellectual development and one that encourages collective input and active participation by all, as well as stimulating critical thinking and analysis;
>
> iii) eliminates illiteracy, ignorance and exploitation of any person by another;
>
> iv) equips and trains all sectors of our people to participate actively and creatively in the struggle to attain People's Power in order to establish a non-racial democratic South Africa;
>
> v) allows students, parents, teachers and workers to be mobilised into appropriate organisational structures which enable them to enhance the struggle for People's Power and to participate actively in the initiation and management of People's Power in all its forms;
>
> vi) enables workers to resist exploitation and oppression at their work place. (Resolution taken at the March 1986 NECC Conference, quoted in Wolpe, 1991b: 80).

Mkatshwa, in the keynote address to the 1985 NECC conference, stated that people's education "prepares people for total human liberation and for full participation in all social, political or cultural spheres of society, helps people to be creative, to develop a critical mind and to analyse" (quoted in Wolpe and Unterhalter, 1991: 10). Clearly, people's education, while taking account of the limited role education was able to play in bringing about liberation, nevertheless presented a far more optimistic view of the role of education than the reproduction theorists had allowed.

An examination of writing on people's education (see for example McKay & Romm, 1992) reveals that it draws heavily on social theorists from the Critical Theory school and educational theorists such as Paulo Freire, Ira Shor (1987) and Henry Giroux (1983). These writers emphasise human agency in the process of social change and thus provide a theoretical basis for the more optimistic view of education resulting in individual empowerment and social transformation which underpins people's education.

Despite the state repression that the organisational component of the NECC was faced with, the notion of a people's education impacted on educational discourse and the popular consciousness. The NECC set up subject commissions to begin examining the practical implications of this approach for a curriculum. The emphasis on relevant education generated wider debates about Eurocentricity and the stress placed on academic education at the expense of technical skills. These eventually penetrated all disciplines, including the sciences, European languages such as German, and even Afrikaans (see Pakendorf, 1990; van Rensburg, 1991). Although the concept remained unclear to teachers, parents and students, the call for people's education enjoyed tremendous support, even amongst 'coloured' and 'Indian' communities (Moolla & Eckstein, 1991) and 'white' tertiary students (NUSAS Congress Reports, 1987, 1988, 1989). Furthermore, despite the explicit linking of people's education to a broader socialist project, the concept became widely acceptable amongst liberal theorists who conveniently chose to focus on the suggestion that people's education should emphasise relevant skills. Thus, as Ann Tothill (1991) shows in her study, liberal capital was not averse to the concept.

This problem led to a major debate around the conceptualisation of concepts such as 'the people'. Richard Levin argued that conceptual clarity was needed in order for people's education to be part of a societal transformation. A resolution to the schools crisis and an implementation of people's education would not challenge capitalist forms of schooling if social divisions were not recognised within the concept 'the people' (Levin, 1991). George Mashamba argued that the concept remains useful and needs to be understood as emerging out of the non-racial discourse of the United Democratic Front (UDF). He argues that people's education is "neither populist or workerist, but specifically non-racial and democratic" (1992: 8). He goes on to argue that,

> (i)t recognises the unity and diversity of the social forces which constitute 'the people', and the central leading role of the working class within the perspective of the national democratic struggle. It is a concept of 'people' which is concrete and historical in character, and which therefore rejects any timeless or abstract notion that divorces a people or nation from their material roots (1992: 8).

Veronica McKay and Norma Romm suggest that the lack of clarity in the concept was in fact in keeping with the methodology inherent in people's education, namely one of dialogue and debate, and a desire to reach conceptual clarity would merely bring about closure and render the concept useless (1992).

Harold Wolpe and Elaine Unterhalter posit an interesting interpretation of the discourses on education in South Africa (1991). They argue that all theorists prior to 1986, be they conservatives, liberals or Marxists, accorded education "immense and unwarranted weight as a mechanism either of social reproduction or social transformation" (1991: 3). They argue that education cannot be analysed as an autonomous social force and conclude that the structures and processes of educational change need to be linked to changes in other social conditions and institutions.

Reproduction theories, according to Wolpe and Unterhalter, have taken two broad approaches. The first is the approach taken by the theorists of *apartheid* in devising the bantu education policy. This was seen as the essential mechanism for the reproduction of the racial order and hence the rigid occupational structure, where 'blacks' were excluded from all but the most menial jobs. Education was seen by the *apartheid* ideologues as the key to ensuring the continued subjugation of 'black' South Africans even after changes in the South African economy and the political system started undermining, from the 1960s, the conditions which had facilitated the functions assigned to education. This plunged bantu education into ever deepening crises which could not be resolved "despite state intervention in the shape of increased finance and changed administrative structure..." (1991: 3). It was this structural crisis which eventually led to a new theoretical approach manifested in the De Lange Commission of 1980.

Wolpe and Unterhalter argue that the second reproduction approach is that of Marxists such as Christie and Collins and other contributors to Kallaway's Apartheid and Education (1984a). Because of their emphasis on the role of schooling in the reproduction of labour power, this approach fails, for Wolpe and Unterhalter, to acknowledge that the educational policies that emerged in the early 1980s were a result of intense contestation and not purely a functional adjustment to the needs of the economy.

The arguments for education as a means of transformation also come from two opposing camps. The liberal position argues that education can be used to achieve equality. This necessitates that the stark inequalities in South African education are eliminated. Once this has been achieved and all South Africans have equal access to education, there can be free and fair competition within the capitalist labour market. The emphasis of research within this paradigm has focused primarily on the inequalities of the education system. Education is autonomous from the other social structures, and thus a reform in the education system will alter the stratification of labour, there necessarily being a change in the other structures of society. Ironically, as Wolpe and Unterhalter point out, this type of thinking was also prevalent amongst the youth of the 1976 uprising who saw bantu education as their primary source of oppression.

The second strand of the thinking that overestimates the potential for education to bring about change is embodied in some of the proponents of people's education. Wolpe and Unterhalter argue that this occurred once the NECC attempted concretely to spell out and implement the ideals adopted at the consultative conferences of 1985 and 1986. In order to do this, the NECC set up subject commissions, some of which were "imbued with the view that an alternative system of education could have substantial effects on 'empowerment', skilling and the production of a new person, in social conditions dominated by the old order" (Wolpe & Unterhalter, 1991: 12). After 1986, during the period of intense repression under the successive States of Emergency, the organisational side of the NECC was crippled. This resulted in the technical commissions becoming the dominant feature of people's education movement. This shift resulted in people's education being increasingly viewed "simply as a system of education divorced from particular political and economic conditions" (1991: 12).

This, for Wolpe and Unterhalter, allows for its 'implementation' without any transformation of society being envisaged, resulting in an ultimate reproduction of society.

The unbanning of political and educational organisations in February 1990 brought about a major shift in the debate, clearing away old ideological differences and shifting the focus from a hypothetical post-*apartheid* society to the urgent demand for concrete policy options. It is this debate which will now be briefly explored.

The Policy Debate

The debate about educational policy for a 'new' South African education dispensation has been entered into by researchers and academics of all theoretical and political persuasions. The *apartheid* state produced two major policy documents which displayed a remarkable degree of continuity from the De Lange commission proposals (DNE, 1991a; 1991b; for a critique see Muller, 1993b: 40-42). The liberal community was also revitalised by the debate, with a number of research institutes funded by industry and commerce generating policy proposals. Amongst these are the Urban Foundation's Education Policy and System Change Unit (EduPol)(for a discussion of Edupol's policy formulation process see Meyer, 1994), the Education Foundation (previously the Indaba Education Group) and the South African Institute of Race Relations. The liberal press also devoted a large amount of space to the education debate. Other policy contributions came in the form of collected volumes (McGregor and McGregor, 1992) and individual books (Hartshorne, 1992; Moulder, 1992).

By far the most wide ranging policy investigation to be carried out in South Africa was set up and sponsored by the NECC. The National Education Policy Investigation (Nepi) drew in a large group of researchers committed to five broad principles - democracy, equality, non-racism, non-sexism and redress. Nepi's brief was to research and analyse the consequences of different policy options which the NECC could use in its negotiations around a future education dispensation. Consequently the twelve Nepi reports do not offer a coherent education policy, rather they pose a number of alternatives which could form the basis for future policy. Each of the reports focused on a different aspect of education and each

assumed that a future state will prioritise that area. (For a summary of the Nepi Reports see Nepi, 1992b.)[7]

Many of the NEPI contributions, as well as a recent volume produced by Research on Education in South Africa (Resa) highlighted a shift in the debate (Unterhalter *et al*, 1991b). Firstly, it was recognised that the socio-economic realities that the post-*apartheid* state would face required compromise and many of the demands of the 1980s struggles could not be met in the short term. Wolpe argued for a realistic assessment of people's education and proposed a seemingly technicist thrust, sacrificing (temporarily) some of the broader ideals that were implicit in people's education (1991a). This is illustrative of what Chisholm identifies as a shift from critique to reconstruction (1992a: 158).

While the publication of the Nepi reports sparked some debate about the proposals (Chetty, 1993; Cornelius, 1993; King, 1993; Wolpe, 1993), by far the most contentious issue was the process of policy formulation that Nepi followed (Young, 1993). It was envisaged that the investigation would be as inclusive as possible and that activists and organisations as well as the general public would contribute toward and comment on the proposals. Further, the research process itself was envisaged as a means of training more 'black' and women researchers. As the deadlines for completion of the reports came nearer it became obvious that few of these ideals were being realised. The deadlines themselves were part of the problem as consultation and training are time consuming processes. Coupled to this was the organisational weakness of the NECC and its sectors which further hampered consultation. The final reports were in fact drafted, with limited contributions from the general public, primarily by 'white', male, university based academics (Nzimande, 1992: 162). Furthermore, attempts to train researchers had limited successes (Ganie & Prinsloo, 1993; Mkwanazi-Twala, 1994; Muller, 1993a: 14-18; Prinsloo & Ganie, 1992).

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[7] The twelve Nepi reports cover the following areas: Adult basic education; Adult education; Curriculum; Early childhood educare; Education planning, systems and structure; Governance and administration; Human resources development; Language; Library and information services; Post-secondary education; Support services; Teacher education. These reports are introduced and summarised in a Framework report.

Central to the reflections on Nepi is the role of the researcher and, more generally, the intellectual in a period of transition (Parker, 1993). Methodological issues such as access to classrooms, language difficulties and power relations between researcher and researched have led to much reflection on the ethics and ability of 'white' researchers researching 'black' subjects (Campbell, 1993; Chisholm, 1992a; Muller, 1993a; Sunde & Bozalek, 1993; Walker, 1993b). Stephen Appel (1993; 1994) provocatively suggests that policy formulation and research are incompatible in that human behaviour is unpredictable and "research is always piecemeal and that results are forever open to interpretation" (1993: 231). Policy is of necessity forward looking and driven primarily by political and practical concerns, not explanations arising out of particular research.

While it might be argued that Appel is retreating into theory, he nevertheless identifies a real sense of frustration amongst participants and critics with the role that academics should be playing in the process of setting up a new educational dispensation. His solution is for academics to surrender their political influence and limit their role to interpretation (1993). This suggestion, together with a growing number of recent contributions to the debate on education have begun to take up some of the issues that post-structural thought concerns itself with (Bensusan & Shalem, 1994; Mason, 1993; Taylor, 1993b; Taylor *et al*, 1994; Shalem & Bensusan, 1993). Amongst other issues, these papers begin to challenge that component of the people's education discourse which sought to use schools to foster a South African identity, arguing that policy needs to take account of difference in society. This has begun to be addressed by Pam Christie (1993) and Johan Muller (1993b) in two recent articles and is taken up in a number of contributions to a new volume on curriculum construction (Taylor, 1993a).

After policy?[8]

In December 1993 the African National Congress, as part of its election campaign, released a discussion document titled *A Policy Framework for Education and Training*. This proposed

[8] This was the highly contested theme of the 1994 Kenton Education Association Conference.

a completely restructured system with emphasis on access, mobility and life-long learning. The document was cautiously welcomed, the reservations based primarily on its failure to spell out the practical details of how such a policy might be implemented. Amongst its most contentious proposals was the provision of ten years of free and compulsory education for all South Africans (ANC, 1994: 10). Although receiving less attention, the document also proposes major reorganisation of the teacher training sector within the framework of viewing the "preparation and development of teachers and trainers (or INSET and PRESET)... as continuous processes" (p.49) and stresses support and professional development of teachers (p.55). Specifically this would involve a shift from summative to formative evaluation within the framework of a "whole school review" (p.56). Clearly then, policy proposals from the ANC were emphasising a strong school-based focus for the training and ongoing support for teachers.

The inauguration of Nelson Mandela as president and the induction of a Government of National Unity (GNU) in the first half of 1994 marked a new phase in the policy debate. Despite the debates reported above, the actual transition from a divided and crisis ridden system to a unitary and 'democratic' education dispensation has proved both slow and extremely messy. Progress has varied from province to province with KwaZulu-Natal lagging behind many of the other provinces. This is partly due to the number of different departments functioning in the province[9], the political divisions which plague the province, the geography of the region, as well as the sheer size of the pupil population.

Essentially, despite minor syllabus reform, very little has changed since the installation of the new government. In the first year of office of the new government, both the national and provincial education authorities were constrained by the existing budget which was designed for the former racially divided departments. This position is further complicated by the need to deliver mass schooling with limited resources without disrupting the former 'white',

[9] KwaZulu-Natal had five state departments operating within its borders: The Natal Education Department, the KwaZulu Department of Education and Culture, the Department of Education and Training, the House of Delegates' Department of Education and Culture, and the House of Representatives' Department of Education and Culture.

'Indian' and 'coloured' schools as these operate comparatively effectively and increasingly cater for the new non-racial middle class[10].

In September 1994 the GNU gazetted their "Draft White Paper on Education and Training" (Department of National Education, 1994) as a discussion document leading up to the formal adoption as government policy. The White Paper provides little more than a framework within which future policy will be formulated and is thus difficult to assess in terms of its feasibility or otherwise.

As with the ANC policy document, the White Paper does emphasise the need for thorough revision of both the pre-service and in-service teacher education. The following illustrates the broad thrust of teacher education:

> The ministry regards teacher education as one of the central pillars of national human resource development strategy, and the growth of professional expertise and self-confidence is the key to teacher development (Department of National Education, 1994: 16).

Clearly the document is alluding to the singular lack of 'professional expertise and self-confidence' which pervades many sectors of the teaching profession (the reasons for this will be examined in detail in Chapter Two). However, besides references to the restructuring of the Teacher Training Colleges, distance education, and the establishment of a National Council for Teacher Education, there is no detail on how the ministry plans to develop teachers into confident, professional experts.

Much of the White Paper stresses the relationship between the education system and the broader social goals of the government's Reconstruction and Development Programme (RDP). This is certainly a strength as the RDP has a high degree of national acceptance which could be harnessed in the process of implementing major reforms in the education system.

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[10] This tension between delivering on the election promises while simultaneously appeasing the middle-classes is a key challenge facing, what Bruce Fuller calls the 'fragile' state (Fuller, 1991; see also Chisholm and Motala, 1995 and Wedekind *et al*, forthcoming).

Conclusion

At the time of writing a new educational discourse was beginning to emerge as the debates shifted away from the previous system and critique, and beyond the policy alternatives to (often legalistic) discussion about the emerging system. Educational discourse in South Africa, although dominated by 'white' academics, has been linked to and shaped by the struggles that have taken place in the schools and communities. Since 1948 the dominance of the conservative-nationalist school restricted the liberal and radical schools primarily to, often extremely devastating, critique. However, with the shift in the balance of forces critique was no longer adequate. A thorough assessment of the various policy options was required and within the near future final decisions on policy and its implementation will be made. A critical question for those grounded in the radical tradition will be the degree to which the alternatives implicit in their critique are realisable.

The Medu school-based teacher development programme which is examined below took place in tandem with these debates. Both the conceptualisation and implementation of the programme, as well as the reflections on the programme were been shaped by the shifts in the discourse on education in South Africa. It began as an attempt to put the principles of people's education into practice. Although the actual successes of the programme were limited, perhaps the experience of the teachers and the Midlands Education Development Unit staff working with them can contribute in some way to the development of research and debate about how best to ensure the development of teachers working in South African schools.

CHAPTER TWO

THE TEACHER, TEACHER ORGANISATIONS, AND SOUTH AFRICAN EDUCATION

Introduction

This chapter explores the position of teachers within the South African education system. In order to begin to examine the school-based teacher development programme which forms the case study for this thesis, it is necessary to explore the historical development of the teaching profession in South Africa. This is particularly important since the models of teacher development that were applied were first developed in an entirely different context. In South Africa teachers have had to negotiate the complexity of the *apartheid* system, which has resulted in many teachers holding contradictory social and class positions. It is argued that this directly impacts on their willingness and ability to effectively participate in the types of programmes described in the case-study.

The differing theoretical approaches to education (discussed in Chapter One) have influenced the ways in which teachers and their role in educational process have been conceptualised. This has impacted in different ways on the form of initial teacher education, the status of teachers and how they were perceived by the communities within which they worked, and how the teachers perceived the child. While one must be wary of speaking of teachers in a way that suggests homogeneity, it is nevertheless necessary to understand some of the factors that shaped the discourses used in discussions about education, schooling and teachers. This can best be done by examining the development of teacher organisations as collective bodies of large numbers of teachers. This will clearly demonstrate that teachers have not simply been victims of state policy but have at different historical moments actively engaged with, accepted, and rejected state policy on education.

A central theme that runs through this chapter is the debates between reform and resistance, and professionalism and trade unionism. It is argued that teachers, while resisting the state for a number of reasons, have failed to address the issue of the curriculum in their

programme. After showing that teachers have not merely been passive recipients of *apartheid* education policies and have a long tradition of contestation and resistance, the impact of the state's policies on teacher training and classroom practice is explored. Particularly, the development of Fundamental Pedagogics and its dominance in teacher training institutions country wide is discussed. Finally, the practical consequences of the racial skewing of education expenditure is examined.

The Social Class Position of Teachers

Jonathan Hyslop points out that "both politics and economics have had a significant impact on South African teachers' decisions to collaborate or resist" (1990: 93) and elsewhere he argues that they occupy a "contradictory class position, in which they stand between the working class and the petty bourgeoisie, and are subject to the political pressures of both groups" (1986: 90). The peculiar class location is exacerbated by a further contradiction, namely that of being both what could be referred to as 'saviour' and 'collaborator'. The popularly held view of most South Africans that education is the primary route out of poverty, and a concomitant dependence on teachers by the public, is countered by an often simultaneously held belief that any participation within the *apartheid* education system is tantamount to selling out and 'doing the work of the oppressor'.

Economically, the policy of job reservation and the racial nature of the job market in South Africa resulted in teaching becoming one of the few career routes for aspirant members of the middle class. This perception is reinforced by the singular lack of middle class 'black' role models within townships and the almost complete absence of career guidance within schools. Often teachers are the only white collar role models available, so many children wish to become teachers simply because they know of no other well paid job (see Harley, 1985). The motivation for entering the teaching profession thus included a strong economic dimension and for some this was very likely the central reason for becoming teachers.

Nevertheless, it would be wrong to label all or most teachers as having an entirely mercenary approach to teaching. A brief look at the organised teaching profession reveals a complex and divided grouping, focusing at times on their own economic interests and at other points being

central to resisting government educational policies. Yet, it is shown that whether teachers resisted or participated, the curriculum and classroom practice remained unchallenged. An analysis of the history of the organised teaching profession illustrates this claim.

Teacher Organisations: Reform and Resistance

Since the 1930s 'African' teachers have been organising themselves into professional organisations and more militant teacher unions. Hyslop (1990) traces developments in the Transvaal and the Cape teacher organisations and shows how the organisations were a site of contestation between a conservative 'professionally' oriented lobby and a more radical, politically aligned grouping with a far more confrontational approach.

The first instances of major teacher militancy occurred during the 1940s as a result of the deteriorating economic position teachers found themselves in because of the Great Depression and war-time inflation. Various campaigns which linked up with parents and political organisations such as the ANC resulted in the government reviewing and ultimately addressing the teachers' grievances, specifically an increase in salaries (Hyslop, 1990: 95).

The militancy of the 1940s resulted in a new strata of radical teacher leaders who were to play central roles in teacher organisations and more significantly, the national political struggles of the 1950s. Hyslop documents the actions of teachers during the 1950s in some detail (pp.96-102), specifically the case of the Orlando boycott in the Transvaal. It is noted that a major contributory factor to the centrality of Orlando is its substantial petty-bourgeoisie, a grouping that is "particularly frustrated in its aspirations" (p.94). It is thus the teachers' middle-class aspirations that are an important catalyst for their militancy, and it is the threatened and actual firing of teachers that results in what Hyslop calls a "right wing backlash" (p.102). Central then to this period of teacher militancy and to the reaction against the militancy are the teachers' economic interests.

The period of the 1960s and early 1970s is labelled "The era of teacher conservatism" (p.107). The various 'African' teachers' organisations went through a period of co-operative engagement with the state, specifically avoiding conflict tactics and adopting the mantle of

'professional associations'. Although these organisations were critical of aspects of the government's educational policy, they saw the best means of opposition as lobbying and 'constructive engagement' rather than confrontation. It was the student uprisings of 1976 that brought teachers under enormous political pressure and saw new fissures emerging in the organised teaching profession. It was this pressure and the entry of younger politicised teachers into the profession that saw a re-emergence of the more militant tradition amongst teachers.

The heightened mood of resistance in the early 1980s saw the formation of a number of small United Democratic Front aligned teacher organisations with an explicit political programme. The largest and most successful of these was the National Education Union of South Africa (Neusa). Even though they were subjected to intense harassment, detention and assassinations, young Neusa teachers, such as Matthew Goniwe in the Eastern Cape and Reggie Hadebe and Thami Mseleku in the Natal Midlands[11], rose to positions of leadership within UDF organisations. Many of those who survived the period of political repression have recently moved into senior positions within government and the state bureaucracy.

Despite state repression and antagonism between the new 'progressive' teacher organisations and the established bodies, from 1985 to 1990, there was an unprecedented drive toward unification ... which changed the face of teacher politics throughout South Africa" (Moll, 1991: 186). The 'teacher unity' process is fascinating in that it clearly "represents a particular kind of political resolution of the contradictions and tensions which have existed in teachers' organisations" (p.186). The deepening crisis in education, the steady downturn in the economy, and in the case of 'white' teachers, the declining numbers of pupils brought together an array of teacher bodies. Already by 1980 all the approximately 40 teacher organisations (with the exception of the Afrikaans language and bilingual 'white' teacher organisations) officially opposed *apartheid* educational policies.

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11 The Natal Midlands is a geographic region centred in Pietermaritzburg and stretching to Mooi River in the North, Richmond/Ixopo in the West, Greytown/Tugela Ferry in the East and Cato Ridge in the South.

This general condemnation of *apartheid* was not a sufficient basis for unity, however, particularly since their "organisational work did not fundamentally challenge the *apartheid* state" (Moll, 1991: 188). It was ultimately the political and economic forces that brought the various bodies together. The communities that were becoming politically organised through the UDF started pressurizing the teacher bodies and individual teachers in their communities. Conservative teacher bodies could not remain outside of initiatives such as the Soweto Parents' Crisis Committee which eventually gave rise to the NECC. Despite tensions, a

> change of decisive importance had taken place. In 1976 there was no significant organization of African teachers which clearly opposed the political basis of state education policy. By 1986 every organization of the profession stood, at least formally, on the side of the popular opposition movements (Hyslop, 1990: 113).

The complex process of negotiation towards the formation and launch of Sadtu in October 1990, which involved the ANC in exile, international teacher organisations and most influentially, the Congress of South African Trade Unions (Cosatu), has been well documented elsewhere (see Hindle & Simpson, 1993; Hyslop, 1986; 1990; Moll, 1991). All accounts echo Hyslop's concluding comments:

> This change represented the revival of a powerful tradition of teacher resistance which had long lain dormant... These developments, one may hope, herald the end of ethnic teacher organizations, and the beginning of a South African teacher organization which can contribute to a nonracial and democratic educational future (1990: 113).

There is evidence to suggest that this view is overly optimistic and is a consequence of a misreading of the nature of the teachers' radicalism. While both Hyslop (1986) and Moll (1991) draw attention to the class location of teachers, they never centrally address the implications of the *petit bourgeois* nature of teaching. Importantly, while demonstrating that teachers are once again adopting radical tactics in opposing the state, they fail to point out that the dominant focus of this radical activity is the securing of teachers' material interests, in other words their pay and working conditions.

Militant action first emerged in the 1940s because of economic issues and the strikes were about pay. The conservative periods coincide with periods of economic growth where

teachers' salaries were comparatively high. The moves toward teacher unity and an emergent teacher radicalism coincided with a rapid deterioration in the conditions at schools (manifested in factors such as overcrowding, violence, retrenchment) and a real decline in the living standard of teachers.

The demands made by striking Soweto teachers in March 1990 serve to illustrate this claim. According to Nkomfe and Moll, the strike was significant in that it was the first time that teachers in the Transvaal broke with their traditional conservative reputation and took action (1990: 23). The demands included:

- The reinstatement of previously dismissed teachers
- The employment of more teachers
- A reduction in the number of teaching periods
- R500 increase across the board after deductions
- Recognition of Neusa
- Repairing of schools
- The building of more schools

(summarised from Nkomfe & Moll, 1990: 23)

No doubt these and other demands made by striking teachers (such as the Nehawu strike in KwaZulu-Natal) were legitimate. The point is that nowhere is the nature and content of education addressed, and it has never been a central issue of teacher action (although individual teachers have made this an issue). In the Soweto strike it was the pupil organisations which called on students to attend school to work out ways of "developing alternative forms of education" (p.24). While lip service was paid to people's education, this took the form of teachers arranging alternative forms of cultural and sports activities to those run by the DET, and refusing to teach non-examinable subjects such as Physical Education and Biblical Studies (p.26). This in no way addresses the central tenets of people's education and leaves the core curriculum intact.

Similarly, the massive Sadtu strike in August 1993 focused primarily on the issue of wages and working conditions and despite some attempts to involve teachers in the development of alternative curricula, there was little evidence that this actually occurred. This was repeated in 1995 when teachers and the new government deadlocked over salary negotiations and teachers held work stoppages in support of their demands.

While industrial-type action may be necessary to ensure that teachers are fairly treated, there is no necessary correlation between trade union action and the development of a progressive education system as is implied by Hyslop. It is perfectly feasible for teachers to take up issues of salaries and better work conditions without in any way challenging the nature of the education system.

It is the dangers of this narrow focus on salaries and working conditions which many of the traditional mainstream teacher organisations criticised and used as a basis for withdrawing from the unity process[12]. Yet the particular notion of professionalism that has developed

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12 The provincially, racially, and in the case of 'whites', linguistically separated traditional teacher bodies include the following:

- 'White' organisations that fall under the Teachers' Federal Council (TFC) such as the Transvaalse Onderwyservereeniging (TO), Transvaal Teachers' Association (TTA), Natal Teachers' Society (NTS), Natalse Onderwysersunie (NOU), the Cape based Suid Afrikaanse Onderwysersunie (SAOU) and South African Teachers' Association (Sata), Association of Orange Free State Teachers (AOFST) and the South African Association for Technical and Vocational Education.
- 'Coloured' teacher organisations such as the Society of Natal Teachers (Sonat), the Cape Teachers' Professional Association (CTPA), Orange Free State Teachers' Association (Ofsta) and the Transvaal Association of Teachers (TAT) which are linked federally under the United Teachers' Association of South Africa.
- 'African' teacher organisations such as the Cape African Teachers' Union (Catu), Natal African Teachers' Union (Natu), Transvaal United African Teachers' Association (Tuata), Orange Free State African Teachers' Association (Ofsata) as well as the Ciskei Teachers' Union (Cistu) which are all organised federally as the African Teachers' Association of South Africa (Atasa).

Although some of these organisations were involved in the teacher unity talks that led to the formation of Sadtu, they withdrew shortly before Sadtu was launched. The withdrawal was based on a twofold disagreement: (1) the structure of the new organisation with Neusa and the 'Indian' Teachers' Association of South Africa (Tasa) insisting on a unitary national structure with all existing unions disbanding while the above organisations wished to maintain their identity and resources and form part of a loose federal structure.
(2) Many of the traditional organisations were concerned with the predominantly trade union thrust of the progressive teacher bodies and wanted a professional body.

After the talks failed, most of the above organisations, with the exception of the CTPA and Sonat, formed the federal National Professional Teachers' Organisation of South Africa (Naptosa). As the name suggests, the dominant thrust is that of a professional association, rather than a trade union.

in South Africa is also problematic. While the ideology of professionalism tends to stress personal autonomy and a high level of expertise, Shalem argues that in South Africa the particular notion of 'professionalism' has been used to "strategically restrict" the teacher.

> The professional teacher is the one who obeys the law and is an apolitical person. Teachers' 'professionalism', therefore does not imply relative autonomy, expertise and status alone, but also a distinction between the educational and political. Teacher autonomy is recognised as such only in relation to the power and authority of those who make and enact the laws of society. Professionalism in this sense calls forth invisible and diffused forms of control (1990: 2).

The ideology of professionalism (and teacher organisations which espouse this ideology have shown this to be true) places limitations on the involvement of teachers in processes of the democratisation of knowledge, which is what was required by the advocates of people's education (see Plaatjie and Nguza, 1991). This is because the particular brand of professionalism espoused in South Africa by teachers draws a false distinction between the educational and the political and in so doing, reduces the struggle over the control of knowledge to an individual matter which occurs in the classroom.

It is necessary that the unionism vs professionalism debate is transcended by acknowledging that teachers' material concerns are important and that it is unlikely that poorly paid teachers are going to view themselves as autonomous professionals. Nevertheless, it would also be erroneous to imagine that well paid teachers will of necessity begin addressing matters related to the nature of the education system that is being forged. Neither side of the debate has addressed the central question concerning knowledge, what it is and how it should be taught in the future, ie curriculum questions.

To understand why there is so little debate about the nature of schooling and education, one must examine the philosophy underpinning teacher education in this country.

__Teacher Training in South Africa__

At the outset it is necessary to reiterate that teachers are not simply indoctrinated into a particular philosophy of education through the teacher training process. Certainly, other factors such as trainee teachers' own experiences of schooling and their family backgrounds are also important factors. Nevertheless, if one accepts Michel Foucault's (1980) notion of discourse restricting and shaping our ability to think in certain ways, it is necessary to examine the theoretical discourse that trainee teachers are exposed to. The discourses that are available to teachers will limit or enable them to think about education in certain ways. Contact with teachers who have been trained at a variety of institutions suggests that the philosophy espoused by the training institution does at the very least influence the personal teaching philosophy that each teacher develops.

The dominant discourse has been the philosophy of Christian National Education (see Chapter One). The pedagogical component of CNE became known as Fundamental Pedagogics (FP). FP has generated a substantial body of literature (see Landman & Roos, 1969; 1973; Viljoen & Pienaar, 1971 for some introductory works) and has also generated much criticism from within the 'open' universities (Beard & Morrow, 1981; Enslin 1984, 1990; Fouché, 1978; Muir, 1968). Much of this criticism queries the particular interpretation of phenomenology that FP claims as its philosophical basis. This debate cannot be entered into here. For the purposes of this study it is sufficient to examine three issues: the relationship between education and politics; the view of the child; and the role of the teacher.

It has been noted above that the ideology of professionalism separates education and politics, and thus restricts the role that teachers define for themselves, limiting their ability to tackle issues such as the politics of knowledge construction. FP attempts to develop education into a value free science, "a science which generates universally valid principles of education" (Parker, 1981: 19). In order for the science to be universal, it needs to identify the essence in a pedagogical situation, and discard all those factors that are local and specific. Clearly then, the politics of any particular education system distort the essence and need to be excluded from the scientific study. Political issues are merely "preconceived ontological judgements about the nature of reality" (p.19) but they are not reality.

The restrictions that FP place on thinking about education and politics are considerable. Because it focuses on an essence, the context in which the pedagogic relationship occurs is irrelevant. Thus, while teachers can be actively involved in political struggles outside their classroom, or even within the organisation of the school, FP does not enable teachers to transport their politicisation into the classroom. The pedagogic moment remains untouched by the struggles outside.

> It provides little illumination of the present social and educational order, of possible alternatives to that order or how teachers might contribute to transformation. By excluding the political as a legitimate dimension of theoretical discourse, Fundamental Pedagogics offers neither a language of critique nor a language of possibility (Enslin, 1990: 78).

It is possible that this bracketing off of pedagogy within the FP tradition and the completely uncritical approach to learning situations has limited teachers' ability to talk about their classrooms as political sites. FP's notion of the 'child' reinforces this further.

Besides phenomenology, the second major intellectual stream running through FP is a strong Calvinist view of the world. While wanting to remove all ideology from educational science, FP quite unproblematically inserts God and Christianity at the essential core of education. This then forms the basis for FP's notion of the child. Like humanity generally, the child is essentially evil (fallen from grace) and needs to be led to adulthood (salvation, Good). The child is measured against a standard which is not socially determined, but laid down by God. Freedom is attained by getting close to the set standard. Freedom for the child is thus linked to obedience and authority (Parker, 1981: 24). The role of the teacher is thus also clear.

The teacher's responsibility as an adult is to assist the child along the path to adulthood and freedom. "The child submits to the authority of the teacher when the source of this authority rests in the teacher's submission to a set of norms laid down by a higher being" (p.25). Disobeying the teacher is tantamount to disobeying God. Education thus becomes a process of submission to the established universal norms, and deviant behaviour is anything that violates those norms.

This educational philosophy clearly has a number of implications for the relationship between teacher and pupil in the classroom. The teacher's authority is unquestionable and the teacher is projected as the holder of all knowledge. The ideal pedagogic relationship between 'educator' and 'educand' is one of submission to the authority of God, and his representative, the teacher by the pupil. Questioning teachers or demanding a democratic classroom are signs of the child's innate evil and this must be punished (preferably by using the rod) to save the child.

At the level of policy, syllabi and curriculum reports are phrased in terms of the "moulding", "forming" and "becoming an adult" (Beard & Morrow, 1981: 8). It is this terminology that permeates the work of Luthuli (1981, 1982) in his attempt to develop a philosophy of 'black' education.

While it is unlikely that trainee teachers will accept the theory in its totality, the discourse of the pedagogic situation may well be adopted and used by teachers. Certainly, the relationship between teachers and pupils in the schools discussed in the case study below was hierarchical, corporal punishment was used, and teachers repeatedly talked about the need to "guide" and "lead" pupils so that they could "self-actualise."

If discourse limits the way we are able to think about a particular situation, then it is possible that the discourse of FP which has been hegemonic in all but a few of South Africa's teacher training institutions is limiting teachers' ability critically to interrogate their classrooms.

It has been argued that although there has been substantial resistance to *apartheid* education, this resistance has not centrally addressed the content and methodology of the education system, aiming primarily at the backlog in resource provision (see below) and the conditions of work. Where content has been criticised, it has tended to be voiced by pupils and academics. Teachers have not been at the forefront of the people's education movement and few have been involved in the process of drawing up policy options. This would obviously be a major obstacle for any project that wished to involve teachers in the change and development of their own classroom practice and the curriculum that is mediated in the classroom.

A Statistical Postscript

This chapter has examined the position of teachers in South Africa. It has focused primarily on broadly cultural factors and has thus far placed comparatively little emphasis on the deliberate and systematic skewing of the education system in favour of people who were classified 'white' under the *apartheid* system. This postscript is intended to briefly illustrate the financial dimension of this skewing, which has an effect on pupil:teacher ratios, pupil: classroom ratios and the qualifications structure within the teaching profession.

Probably the most well known discriminatory practice in education is the funding formula. In 1988, the state paid R2 769 towards the cost of every 'white' child's schooling as opposed to R595 for every 'African' child. At this stage the Nationalist government had already committed itself to an equitable funding formula, and there was already an improvement in the funding of 'African' education. Even after the first democratic government under Nelson Mandela had been in office for a year, education funding continued to be skewed along largely racial lines. Research undertaken by the Education Foundation revealed the following per capita expenditure for 1994:

House of Assembly (formerly 'white')	R4 772
House of Delegates (formerly 'Indian')	R4 423
House of Representatives (formerly 'coloured')	R3 601
DET	R2 110
KwaZulu	R1 447
Average	R2 409

(Edusource Data News, April 1995: 9)

It is interesting to note that children schooling in KwaZulu administered schools continued to receive the least funding in the country. This deliberate and systematic underfunding of 'African' education is probably the biggest single reason for the state of schooling in South Africa today.

According to the South African Institute of Race Relations (SAIRR), in 1988 there were some 290 000 teachers in South Africa (see table below).

Education Department	Number of Teachers
DET and all 10 homelands	177 057
House of Representatives (Coloureds)	35 665
House of Delegates (Indians)	12 015
House of Assembly (Whites)	56 000
Total	280 747

Source: SAIRR, 1988

The Research Institute for Education Planning (RIEP) reports that in 1992 there were still some 25 044 'African' teachers without professional qualifications (Strauss *et al*, 1993: 7). The 1994 figures are not presented with a racial breakdown, which accounts for a marginal increase to 25 410 or a total of 8,38% of all teachers (Strauss *et al*, 1995: 8). Many teachers that were professionally qualified, had no more than Standard 10 and two or 3 years of college training.

The vast majority of un- and underqualified teachers were likely to be found in rural areas. This is borne out by the KwaZulu Department of Education and Culture Annual Report for 1991 which showed that where a rural circuit such as Msinga with a total of 818 teachers, 387 were professionally unqualified while an urban circuit such as Edendale with a total of 1 512 teachers, had only 95 professionally unqualified teachers (DEC, 1991). If a bachelors degree and a diploma or a four year diploma are regarded as the minimum qualification, then only 34,27% of all teachers meet these requirements (Strauss *et al*, 1995: 8).

As far as pupil numbers go, RIEP provide the following figures for KwaZulu-Natal:

Primary	1 742 050
Secondary	715 680
Total	2 457 730

(Strauss *et al*, 1995: 21)

KwaZulu-Natal is the province with the highest number of pupils, and predictions by RIEP for the year 2020 based on the 1991 census indicated that it will also have one of the highest increases in population. If this is coupled with data indicating that approximately 20% of

children aged between 7 - 14 in KwaZulu-Natal are out-of-school, then the total potential pupil population is significantly higher than the figures cited above and probably in the vicinity of 3 million children of school going age.

The pupil-teacher ratio for KwaZulu-Natal averaged out at 37,4:1 (Strauss *et al*, 1995: 17). However, this figure does not distinguish between the various departments that provided schooling in the province. The Education Foundation data based on the 1991 census (and providing a racial breakdown) indicated that the majority of census districts in KwaZulu-Natal had pupil/teacher ratios of over 46:1 (Krige *et al*, 1994: 60). This figure included principals and some categories of support staff who do not in fact teach so the *de facto* average must be higher than that. This was borne out by the experience of DET and KwaZulu schools in Pietermaritzburg between 1991 and 1993 which had much less favourable ratios than the national average (see Chapters Three and Four below).

The national statistics on education thus reveal a significant demand for teachers, schools and classrooms (see Krige *et al*, 1994 for a graphic breakdown of these backlogs). However, the distribution of the backlog is not evenly spread and thus, as Strauss *et al* point out, while there is a need to train new teachers in some regions to address the backlog, "there is a larger need to upgrade the qualifications of practising teachers than to train large numbers of new teachers" (1995: 17). Practising teachers were the focus of this study, and a description of their specific context follows.

CHAPTER THREE

SCHOOLING IN KWAZULU-NATAL

Introduction

This chapter locates the study within the particular context of schooling in KwaZulu-Natal. While KwaZulu-Natal is obviously in no way divorced from the broader issues discussed in Chapters One and Two above, there nevertheless are peculiarities specific to this context. The programme under discussion in Section Two and Three below needs to be located firmly within the socio-economic and historical context of KwaZulu-Natal generally and the Pietermaritzburg-Msunduzi area particularly.

This chapter thus examines the state of education in the province prior to and during the implementation phase of the programme, firstly in terms of administration and resources, secondly in terms of the teaching conditions in the schools, and thirdly interms of the impact that the violent political conflict in the province has had on teachers and schooling, specifically the ability of teachers to respond to the crisis in education in a meaningful and collective way.

Administration of 'black' Education in Natal and KwaZulu[13]

KwaZulu-Natal is the most populous region in South Africa with an estimated population of between eight and nine million people (Central Statistical Services, 1995). The dominant linguistic grouping is Zulu, although there are significant numbers of Sotho and Xhosa speaking people who have moved into the urban areas from the Transkei, Lesotho and Orange Free State. 'Indians' make up the next largest grouping of people, followed by English speaking 'whites', 'coloureds', Afrikaans speaking 'whites', and other smaller immigrant groupings.

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13 Under the 1984 constitution Natal and KwaZulu were separate entities. KwaZulu was a self-governing homeland within the borders of the province of Natal.

The KwaZulu homeland fell within the borders of the Province of Natal and had "Self Governing" status. Although funded by South Africa, KwaZulu had control over its own budget and was responsible for education, health, pensions, policing and most other state functions, except taxation and defence.

'African' education in KwaZulu was controlled by the Department of Education and Culture of KwaZulu (DEC) and in Natal by the national Department of Education and Training (DET). The DEC, which was formed in 1977, controlled all schools that fell within the borders of the KwaZulu homeland while the DET controlled schools in urban townships outside of the homeland and schools located on 'white' owned land such as farm schools.

Kwazulu and Inkatha

One cannot fully understand the political dynamics in KwaZulu-Natal without examining the relationship between the KwaZulu homeland government and Inkatha, and the particular role of Chief Mangosuthu Gatsha Buthelezi[14]. Inkatha was launched in 1975 as a cultural movement and was constitutionally linked to the KwaZulu government. This meant that all KwaZulu chiefs and Members of the KwaZulu Legislative Assembly were automatically members of Inkatha. This turned KwaZulu into a *de facto* one party state with Inkatha having direct control over state resources, not least the massive education system that catered for residents of the homeland.

There were an estimated 2,7 million people of school-going age in Natal and KwaZulu, and 1,6 million of those were in KwaZulu administered schools (cited in Bhengu, 1990: 20). This type of access to youth in the region gave Inkatha enormous influence, and it attempted to exploit this situation to the utmost. Inkatha's long time General-Secretary Dr Oscar Dhlomo was also the Minister of Education and Culture of KwaZulu. In 1979 Inkatha introduced a subject known as *Ubuntu-Botho* (loosely translated as African

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14 Inkatha's history and development is complex and cannot be entered into detail here. Readers are referred to Gwala, 1988; Maré, 1992; Maré & Hamilton, 1987; Marks, 1986; McCaul, 1988; Mzala, 1988.

Humanism) into the KwaZulu school system. An extract from a DEC memorandum sent to KwaZulu school principals in 1978 outlines the aims of this new compulsory subject:

> The syllabus is based on the aims and objectives of the National Cultural Liberation Movement (Inkatha) as found in the Constitution... In drawing up the syllabus the committee was influenced by the need to develop in our youth the whole person within the ambit of the Inkatha constitution... (and) that many adults seem to hold divergent views and beliefs about Inkatha... These are passed on to the young to cloud the youths' minds. It is thus hoped that this syllabus together with its guide will clear many doubts and thereby create unified ideas to match with the goals of Inkatha (cited in Bhengu, 1990: 22-23).

The schooling system was also seen as a logical base for the establishment of Inkatha Youth Brigade branches, and teachers were instructed to aid this process (see Mdluli, 1994).

Inkatha's control over education in KwaZulu included its relationship with the Natal African Teachers' Union (Natu). Natu was the regional affiliate of the African Teachers' Association of South Africa (Atasa) which organised teachers in the DET and homeland education departments. Natu formally affiliated to Inkatha in 1977 (Natal Mercury, 27.5.77; Sunday Tribune, 15.5.77 cited in Moll, 1991: 188) and has never formally disaffiliated.

> In practice the widespread belief amongst teachers in Natal that there has been an identity between Natu and Inkatha is fuelled by the fact that the vast majority of Natu office-bearers over the past ten years have also been Inkatha members (Moll, 1991: 188).

Inkatha even has some influence within the DET. For example, one of the senior Natal Region DET officials (and currently acting Director) prominently displays an Inkatha Freedom Party flag on his desk (Pers.Comm. 2/07/92).

Finally, it is worth noting that some of the strongest 'African' advocates of Fundamental Pedagogics (such as Luthuli, 1981, 1982) had strong links to Inkatha through the University of Zululand.

It would be wrong to suggest that Inkatha had absolute control, however. Instances of resistance by teachers did occur. For example, in 1989 the National Education, Health and Allied Workers Union (Nehawu) recruited some teachers in the Natal Midlands after a pay dispute between various categories of KwaZulu workers, and embarked on strike action. However, this oppositional militancy was short lived and the union was crushed in the overwhelming violence that erupted in the area after 1990.

Teaching Conditions

The working conditions of teachers in the KwaZulu homeland were amongst the worst in the country. KwaZulu-Natal has a large rural population, so many of the schools are situated in remote areas which have few facilities. Infrastructurally, schools generally operate without support staff, equipment, electricity or telephones, the latter making the bureaucratic administration of the school extremely difficult. Bhengu (1990) describes conditions in her school which are extreme but not entirely untypical, and worth quoting at some length:

> For two years we taught high school pupils ie. standard 9 and 10 in two classrooms: one was filled with 198 pupils in a classroom meant for, at most, 50 pupils. Further, when two teachers occupied the classrooms, the rest of the lesson had to be conducted under trees. We even continued teaching after school in the teachers' houses. The school had neither water nor toilets. Our pupils were thus forced to use the facilities (ie. toilets) of the neighbouring secondary school. After some time this, in itself caused friction between the two schools [sic].
>
> There were only five teachers to divide the 10 subjects amongst them. In some instances, one teacher had to deal with five subjects. Most of the pupils walked long distances to school, as transport facilities were non-existent. Because most of them came to school on an empty stomach, this coupled with the overcrowding resulted in most of the pupils sleeping during classes...
>
> The text books arrived late, sometimes as late as June. As too few were always supplied, we were forced to go to other schools to beg for left-overs so that we could supply our pupils. The inspectorate was not helpful at all, in fact they were not interested in solving any of the problems brought to them (1990: 22).

Clearly conditions such as these make it unlikely that teachers would remain committed to, and interested in, their work. Alcohol is seen by some as the only palliative, resulting

in teachers arriving at school drunk (NECC, 1990). Alternatively, teachers entered into ongoing study programmes through local universities or correspondence courses through the University of South Africa (Unisa) or Vista University. There is a widespread perception that the consequence of correspondence study has been that teachers divert their focus from their classrooms in order to cope with their own study pressures.

Besides the poor work environment and the "mental strain" of teaching a number of different subjects with few free periods (Sibiya, 1990: 28), teachers have a difficult relationship with their employing body. A number of teachers reported that the KwaZulu DEC took up to six months to process appointments during which time appointees did not get paid, and that when the salaries eventually did come through there were almost inevitably errors which were corrected arbitrarily (Fieldnotes, February 1991).

The process of appointment too was a contentious one, because principals determined who would get posts in their school. This gave them an extremely powerful control mechanism.

> On the issue of freezing posts, allegations have been made by teachers that principals and department officials deliberately avoid advertising posts, in order to appoint people of their own choice. They aim to appoint those who do not pose a threat to their bureaucratic interests (Sibiya, 1990: 27).

The section above has concentrated on conditions in KwaZulu schools, primarily because the schools discussed below in the case-study were initially administered by the DEC. The schools administered by the DET tended to have more favourable conditions. Certainly their systems operated more effectively, their pupil-teacher ratios tended to be lower, and there was usually greater access to resources. This was partly due to the location of the majority of DET schools in urban areas, which allowed teachers far greater access to DET officials. Nevertheless, it would be wrong to suggest that DET schools were substantially better, and the general picture remains true for both the DEC and the DET. At the time of writing, teachers worked in overcrowded conditions, with heavy workloads, and very little backup from their employing departments.

These general conditions were exacerbated by the eruption of violence in Natal, and particularly the Natal Midlands, in 1989 and 1990. The impact of this violence on education is discussed below.

Schooling and Violence in KwaZulu-Natal

Although in every other respect schooling in Pietermaritzburg-Msunduzi is not very different to the rest of KwaZulu-Natal, or indeed South Africa as a whole, the difference has been the violent political conflict which has been a dominant feature of schooling in the townships around Pietermaritzburg since the mid 1980s.

The extent and scale of the political conflict has been significantly higher over a longer period than anywhere else in the country (Gultig & Hart, 1990: 2). Numerous studies have documented the war in detail since 1987 (see Centre for Adult Education, 1991; Aitchison, 1993). However, very little research has been done on the effects of this violence on schooling in Pietermaritzburg. Gultig and Hart's study (1990; 1991) on this topic, a broader study covering the whole of Natal by Nzimande and Thusi (1991), and a theoretical analysis by Graaf (1994) seem to be the only exceptions. Teachers' and parents' own recollections are a further important source of data (see for example Bhengu, 1990; Mlotshwa, 1990; Ndandane, 1990; Nxasana, 1990; Sibiya, 1990 and the accounts collected by Reeves, 1994.)

A detailed description of the findings of these studies is not possible here. However, as Gultig and Hart point out,

> (t)he research into the effects of violence on schooling in the Pietermaritzburg area paints a depressing picture. An already overburdened system is in the process of breaking down and this has serious implications for organisations seeking to transform the school system (1991: 223).

Nzimande and Thusi list three important findings that emerge out of Gultig and Hart's 1990 paper. The first was that violence was identified as the single most important factor in the disruption of schooling in Pietermaritzburg. This was the perception amongst

students, parents and teachers and was backed up by empirical evidence. The second significant finding was that schools were being used by Inkatha to 'eliminate' students who identified themselves with the ANC and its allies. Thirdly, the violence created tensions, not only between students of different political affiliations, but also between students who were at school and those that have been displaced, and between activist students and those that wished to remain neutral (Nzimande & Thusi, 1991: 20).

Some specific observations on the effects of the violence on teachers are worth examining further as they provide a useful basis for understanding the constraints faced by teachers participating in the programme being examined below. It is clear from Gultig and Hart's study that relationships between teachers and students were strained as a result of the conflict. Factors such as teachers having to carry out registration and, by implication, implement exclusion rules resulted in teachers being perceived as the enemy. "Violence is erupting everywhere. People have been brought up in a culture of violence and they react violently to any situation which irritates them" (Sibiya, 1990: 26).

The teacher-student relationship impacts on the nature and effectiveness of any teaching methodology and it is thus worth quoting Gultig and Hart at some length on this issue.

> Student(s)... characterised their relationship with teachers as having deteriorated and lacking trust. They said teachers had 'lost control' and that they feared pupils who had lost respect for them. Contacts in schools report conflict in schools for a number of reasons, such as teachers being absent from classes and attacks by pupils on a teacher... (I)n many schools starting and closing times were haphazard, and pupils came and went as they pleased. This seems indicative of a serious breakdown in communication between teachers and pupils.
>
> The conflict has affected relationships in other ways. A group of students interviewed told us that history teachers were unable to express themselves freely because they feared that members of 'certain organisations' would label them as UDF members and they would be in danger (...). The counsellor, priests and teachers interviewed saw teachers' position as untenable. Their teaching had become increasingly defensive, confined to the syllabus with no relationship or communication with pupils outside the classroom (1991: 221-223).

There are a number of very serious implications for the possibilities of creating a fruitful learning environment within the scenario painted above. A relationship of mutual trust

between the teachers and students that allows for participation, negotiation and experimentation is central to most critical teaching methods. Freire identifies the need to "see the project for liberatory discourse... as... transforming the power separations between teacher and students" thus creating an atmosphere conducive to liberatory learning (Freire & Shor, 1987: 23). In Pietermaritzburg these power separations were being reinforced rather than transformed. Teachers and students viewed each other with suspicion and mistrust, fuelled particularly by occasional attacks on teachers.

Added to this were the enormous practical problems that teachers have had to contend with. Both Nzimande and Thusi (1991) and Gultig and Hart (1991) detail the material consequences of the conflict. Repeated closure of schools, massive shifts in the student population with the resultant fluctuation in student numbers and subject packages as well as stress related to the sustained contact with violence all increased the pressure on teachers. Enormous backlogs had to be made up under pressure from students, parents and the department for positive exam results at the end of each year with the consequence that teachers tended to "rely on tried and tested authoritarian methods. Debate about alternatives is seen increasingly as a luxury to be left until better times" (Gultig & Hart. 1991: 225).

Teacher Organisations

One of the consequences of the conflict was the virtual destruction of educational organisations, particularly 'progressive' teacher unions. Contrary to the optimistic comments about possibilities for Neusa to organise in the Pietermaritzburg area (Gultig & Hart, 1991: 227-228), progressive teacher organisations experienced enormous difficulty in organising teachers in Edendale schools and by the end of 1991 no branches of Sadtu had been established (Pers.comm., Sadtu Midlands Interim Chair, 7/11/91).

Teacher unions were unable to provide much support for teachers during the crisis. This was partly due to the direct harassment of teachers by the education authorities. As Mlotshwa points out, "the authorities handed out circulars which stated that disciplinary measures would be taken against any teacher who was involved in political activities or

was a member of a progressive union" (1990: 31). Teachers who fell under the KwaZulu DEC were required to sign a pledge of allegiance to Inkatha and were threatened with dismissal should they participate in any Sadtu organised action (Moll, 1991: 188).

Another factor that might account for Sadtu's inability to organise in the Edendale/Vulindlela area was the issue of 'displaced teachers': Much of the teaching staff in the upper Edendale area commutes from lower Edendale. When these two areas became politically polarised after the 'Seven Day War' of 1990 (see Aitchison, 1993), many of the teachers could not return to their schools because they came from an 'ANC area' and were thus labelled as ANC supporters. It thus became virtually impossible for the teachers to continue work and the schools effectively closed. The DEC threatened dismissal if the teachers did not return to work, and after assurances from local Inkatha leaders that teachers would be protected, a steady trickle of teachers returned. This led to tensions between teachers who had returned and those teachers that refused to return and were subsequently fired by the DEC.

A number of the 'displaced teachers', as they came to be known, accepted posts within DET schools in the lower Edendale valley. Again tensions emerged between those that had gone back to work and those that wished to pressurise the department for their jobs and back pay. Finally, a core of 130 teachers remained. This core of teachers organised themselves as Sadtu, and while almost all of them were ultimately placed in DET schools, Sadtu continued to be associated with this militant action and found it difficult to organise the majority of teachers under its banner. The tensions between the 'displaced teachers' and those that went back to work undermined the union. Furthermore, teachers had witnessed the hardline approach of the DEC and saw no benefit in publicly joining Sadtu. It was only after the recognition of Sadtu by the DET and its entry into salary negotiations that a massive swelling of Sadtu membership in DET schools occurred. The KwaZulu government continued to refuse to recognise Sadtu and threatened all its teachers with dismissal should they participate in Sadtu activities (Pers.comm., Sadtu Natal Midlands interim chair, 7/11/91). These developments occurred in the final months of the programme under discussion here, and had little or no impact on the running of the

programme in the schools under study. However, the growth of Sadtu did have a significant effect on the proposals that emerged out of the final evaluation.

In summary then, the lack of a strong teacher organisation made it difficult for the conditions that teachers worked under, or the deteriorating teacher-student relationship, to be addressed at an organisational level. As Gultig and Hart show, the education authorities did not respond to the crises teachers faced. Without strong teacher unions to take up their complaints, teachers felt helpless and "saw no purpose in individual action. The result was a retreat into the confines of the syllabus and the classroom, isolating themselves from their pupils" (1991: 223).

Educational Transformation vs Political Transformation

Despite the fact that there were opportunities for the development of a people's education, Gultig and Hart conclude their 1991 version of the paper with the belief that the war stunted this process. Nzimande and Thusi are highly critical of Gultig and Hart's call in the first version of the paper for a greater emphasis on the "specificity of the school" (p.15) i.e. focusing on the transformation of the school rather than the focus on broader national questions. They argue that this conceptualisation is flawed in that it "underplays the fact that the nature and form of contemporary education struggles have been thrown up by the wider political struggles in society" (Nzimande & Thusi, 1991: 23). Nzimande and Thusi see this as an argument for the depoliticisation of education, which they reject. In fact, they locate the possibility for the transformation of education in KwaZulu-Natal firmly within the broader political struggle, particularly the strategy to end violence.

Nzimande and Thusi's rejection of Gultig and Hart's assertion that more emphasis needs to be placed at the level of the transformation of the school clearly places a question mark over programmes such as the one described below. But, the danger in Nzimande and Thusi's argument lies in a simple rejection of any efforts that are not firmly located within the struggle to end violence in the region. This seems to be reductionist and fails to recognise the potential to contest the political hegemony at a number of levels simultaneously. An overemphasis of either one of the levels is flawed and places us into

the old structure/ agency divide. It is surely true that the space to implement a people's education could only exist if there was peace, but it is equally valid to argue that it is important to know what people's education is, in order to implement it when peace is finally achieved.

Nevertheless, Nzimande and Thusi's critique raises important questions about intervention programmes such as the one described below. To what extent is it possible to transform a school from below (or within) as Gultig and Hart suggest, and to what extent is the programme firmly located within the broader political struggle? Both of these questions are central to the assessment of the programme as a possible teacher development strategy as well as an emancipatory learning project.

CHAPTER FOUR

THREE EDENDALE SCHOOLS

Introduction

The above discussion needs to be located within the specific schools that constitute the participants in the programme which forms the basis of the case study discussed below. In all, three schools in the Edendale Valley were involved in the methodology programme. For the purposes of this study they are referred to as School A, School B and School C. While each school had its own specific dynamics and problems, each had a similar history in terms of its administrative position.

At the beginning of 1991 all three schools fell within the Edendale Circuit of the KwaZulu Department of Education and Culture (DEC). As Nzimande and Thusi correctly point out, this circuit straddled a KwaZulu and non-KwaZulu area (1991: 14)[15], Thus, while the school was controlled by KwaZulu, and by implication Inkatha, the surrounding area fell under the Department of Development Aid, with the result that Inkatha had no political control over it. After the 'Seven Day War' of March 1990, the DEC practically ignored those schools that were not under the political control of Inkatha. This was exacerbated by a court ruling forcing the DEC to hand over control of those schools which fell outside of KwaZulu to the DET[16]. The transfer from the DEC to the DET took place, ironically, on 1 April 1991. The result of these two factors was that during the transition period the schools concerned operated in an administrative vacuum, nominally being part of the DEC but having been abandoned by it for all practical

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15 As part of the programme of consolidating homelands and bringing all African areas under the control of one authority, a number of schools that were not within the official boundaries of KwaZulu were nevertheless administered by the KwaZulu DEC. The three schools described here were in this position.

16 This decision came as a result of an NECC campaign calling for the dismantling of the DEC and the return of control of schooling to the DET as an interim measure (see Nzimande and Thusi, 1991: 75 for the NECC - Natal resolution.)

purposes. The implications of this for the Teacher Development Programme are discussed in Chapter Eight.

School A

The community surrounding School A could be described as semi-rural or peri-urban. The houses were predominantly made of wattle and daub with limited services supplied. The school was set up on a hill with only one access road. The nearest bus stop was five kilometres away. However, due to the history of the conflict described above, many of the students registered at School A did not in fact come from the surrounding areas but travelled from as far afield as Imbali, Ashdown and the city each morning to attend school.

The school had 14 classrooms; a room which was called the laboratory, but which had none of the facilities and was used as a classroom; a double classroom designed originally as the school hall, but subsequently sub-divided by cardboard and used as two classrooms; two staff rooms, divided according to gender[17]; an administration section which consisted of the principal's office containing one desk and a chair; and a section originally intended as the library but used as a storeroom to house broken desks. At the beginning of 1991 the school had approximately 350 desks. There was no electricity supply, nor adequate ablution facilities, with the students and staff relying on six 'long drop' toilets.

In 1991 the school had 25 teaching posts, including the principal. There were no administrative or support staff. Two posts remained vacant, leaving the school without a mathematics or economics teacher throughout the year. All the teachers were qualified

17 The reason given for the gender separate staff rooms was that during the violence it was important that the women be together where they could be protected. No one could explain why this practice continued during periods of relative peace.

with either college diplomas or university diplomas, and two had Bachelor of Education degrees[18].

Given the number of teachers and classrooms, the school was designed to house 650 pupils according to the DET pupil-teacher ratio of 35:1. However this ratio had long been ignored by the DEC which set its limits at 50:1, the school thus being expected to accommodate no more than 800 students. Despite these ceilings, the school enroled 1 167 students in 1991 with an average ratio of 65:1, the biggest class containing over eighty students.

In 1991 the school was not supplied with any stationery or textbooks by the DEC. There were practically no teaching aids beyond the chalk board in each classroom. Students were expected to pay R20 in school fees for the year to pay for the running of the school. Most pupils were able to afford this sum (Pers.comm., School A liaison person, 12/8/92).

Recorded interviews with teachers (pers.comm., School liaison persons, 12/8/92; 4/9/92) revealed that many of the findings referred to by Gultig and Hart (1991) and Nzimande and Thusi (1991) were evident at the school. While teachers felt that the relationship between teachers and students was generally good, the violence had "made pupils think that they can overcome authority" and they were thus "difficult to control" (English teacher). "Outside elements" and "unscrupulous political elements" (would not specify further) were seen to be the major source of trouble (Business Economics teacher). Alcohol and drug abuse was an increasing problem, exacerbated by the near proximity of a local shebeen. Attempts to persuade the shebeen owner not to sell alcohol to students had proved unsuccessful.

Another major problem outlined by the teachers interviewed was the continual latecoming of students. The teachers emphatically rejected the suggestion that this was related to

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18 It is not unusual for the entire staff to be qualified despite the statistics presented in the introduction. School A is sufficiently urban for teachers to be able to commute from the middle class parts of Pietermaritzburg to school every day. It is primarily in the rural areas, where the majority of schools are located, that teachers are un- or underqualified.

transport difficulties, arguing that they too used the same transport and were always on time. One of the teachers suggested that the pupils no longer found education interesting and attributed this to the consequences of violence more than the alienating curriculum.

> I often ask myself if we were discussing current history or relevant geography whether the pupils would all attend on time and be interested, and I have to say that the answer would be a big NO. Not that we should not develop the curriculum... we should! But the problem is deeper than that (History teacher).

<u>**School B**</u>

School B was one of the oldest schools in the Edendale valley and was better equipped than School A. One section of its buildings was electrified and it boasted a science laboratory with limited equipment. Unlike the other two schools, School B had a telephone, although during most of 1991 it was out of order because the lines had been cut during the violence and the telephone company was not prepared to venture into that section of Edendale to repair them.

Interestingly, the school also had a small boarding establishment (80 students) which attracted local and foreign rural and urban students. One of the students interviewed came from Johannesburg and was sent "because my mother wanted me to learn proper Zulu."

The school had 992 pupils doing science and 'general' subject packages. The staff comprised twenty five teachers and ten support staff. As with School A, all the teachers had some form of qualification although only two had degrees and two had been trained as primary school teachers. There were sixteen classrooms.

One of the distinguishing features of School B is its physical proximity to a Dickensian leather tannery. The factory pumped out noxious chemical gases into the air which drifted through the school, at times bringing tears to the eyes of students and teachers alike. Added to this, the factory dumped its wastes into large pools across the road from the front entrance of the school and when the wind blew in the right direction the smell of

rotting flesh hung in the air. For the uninitiated this could quite quickly lead to strong feelings of nausea!

School C

School C is located close to Dambuza, a section of Edendale that was notorious for its 'tsotsi' gangs and the high level of crime. Unlike the area surrounding School A, Dambuza residents did not own the plots where their houses were built, but rented them from the Edendale landowners who charged exorbitant rents for no services. The houses were not electrified or connected to the water system, there being approximately one tap for every ten to fifteen houses.

According to the principal the location of the school posed its greatest difficulties. Many of the students lived in Dambuza and socialised with the youth gangs that moved around there.

> When I was appointed principal, the students used to come and go as they pleased. Some would only arrive at about ten o'clock, and then their friends who aren't at school would come and call them out at about eleven. For the first two weeks I just sat in my office and said nothing (Pers.comm., School C Principal, 10/3/92).

During the course of 1991 the new principal set about establishing order out of the chaos by getting staff and pupils to agree to set school hours, meeting with parent and community organisations and introducing administrative systems. By the time School C joined the programme in 1992, it was operating as effectively as School A and B.

School C had a staff of thirty teachers, all of whom were qualified, although four had qualifications for primary level only. Half the staff had university degrees. There was a clerk who assisted the principal and the school employed a factotum.

Due to the number of refugees staying in the Dambuza area, as well as the nationwide Back to School Campaign[19], School C was inundated with applications at the beginning of 1991 and 1992. Although the official DET class size was set at thirty-five, all three schools admitted far more than the limit. In School C the effect of this policy was most evident in the top two standards, with one matric class consisting of 130 students.

Conclusion

Although each of the schools described above had its own specific problems and idiosyncrasies, there nevertheless was a pattern. The schools were all poorly resourced, overcrowded and constantly faced disruptions. The teachers working under these conditions often became despondent and demotivated. The pupils, many of whom had been at the forefront of the war in the region, lacked a sense of purpose to their schooling and often did not wish to be at school. According to an unpublished research project undertaken by the NECC (Natal Region) during 1991, these problems seemed to have been fairly typical of the situation in most schools in Natal.

It is into this context that the teacher development programme was introduced. The possible success and weaknesses of the programme were to some extent shaped by this context. It is to the background of the programme that this dissertation turns in Section Two.

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19 Shortly after his release from prison, Nelson Mandela made a number of calls to the youth of South Africa to return to school. This call was supported by the recently unbanned National Education Co-ordinating Committee (NECC) and its affiliates such as the Congress of South African Students (Cosas). The call resulted in a massive increase in applications to schools, reaching crisis proportions in many areas.

SECTION TWO

CHAPTER FIVE

IN-SERVICE EDUCATION AND TRAINING IN SOUTH AFRICA

Introduction

Given the state of teacher training and the conditions in which 'African' teachers in particular have to work (see Chapter Two), there is a critical need for the training and professional development of teachers who are already in the field. While most commentators and policy documents acknowledge the need for both a thorough revamping of pre-service teacher training as well as "a renewal policy which prioritizes upgrading of unqualified and underqualified teachers and provides INSET to prepare all teachers for institutional reconstruction and curriculum change" (Nepi, 1993b: 241) it nevertheless remains true that "the INSET field is undertheorised and under-conceptualised" (Hofmeyr & Jaff, 1992: 184).

One of the difficulties with examining In-service Education and Training (Inset) is that the term is all encompassing and signifies a range of theoretically and practically distinct activities. Central to the lack of conceptual clarity is the accommodation of both 'education' and 'training' within the acronym, despite the fact that these terms carry different meanings (Hartshorne, 1992: 257). Education is synonymous with professional development, i.e. an autonomous agent able to analyse and respond creatively to any situation. Training implies the development of a competent technician who is able to implement what the system requires. While this distinction is far from clear in practice, the debate about Inset tends to view most current state run Inset as premised on the latter, while much of the Inset work of NGOs is aimed (at least in theory) at the former.

For the purposes of this chapter, any attempt at educating or training teachers who remain employed as teachers during that process will be regarded as Inset. This includes formal upgrading of qualifications through, for example, part-time university or college courses, short refresher courses on content or methodology run by education departments or

non-governmental organisations (NGOs), or informal school-based programmes run by schools, teacher organisations, or NGOs.[20]

This chapter examines the models of Inset provision (in the broadest sense) by both the state and the non-governmental sector in the early 1990s, explores different modes of Inset delivery, and examines current policy proposals for Inset. This provides a framework within which the Inset work of the Midlands Education Development Unit (Medu) can be located in order to evaluate the possible implications of the unit's programme for Inset strategies more broadly.

Inset in South Africa tended to be sporadic and un-coordinated with a large number of agencies operating in the field (see for example Levy's 1992 survey of science Inset programmes). This was partly due to the lack of policy regarding Inset and the number of different institutions involved in Inset provision. Inset can initially be separated into two components on the basis of provision: the state and non-governmental agencies.

Inset Provision by the State

State provision occurred through the various ethnically-defined education departments and there was thus no uniformity of experience amongst teachers as some departments offered fairly comprehensive Inset programmes while others offered little or no Inset at all. For the purposes of this study only the DET and the KwaZulu DEC are examined.

Hartshorne traces the history of in-service programmes for 'African' teachers back to the turn of the century and shows that the concept is by no means new (1992: 259). However, it has been generally accepted that Inset has been seen as a cornerstone of educational reconstruction and seriously addressed only in the period after 1976 (Hofmeyr & Jaff, 1992: 174; Louw & Bagwandeen, 1992: 300) possibly as a consequence of the strong advocacy for Inset by the De Lange Commission (see Niven, 1982).

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20 Full-time study will not be discussed here as the teacher does not study and work concurrently.

Department of Education and Training

Inset in the DET took on a number of different forms and the DET experimented with a variety of modes of delivery and media. A primary focus was the upgrading of qualifications as this was seen as a serious weakness in the education system. Two categories were addressed: those teachers that were 'professionally' un- or underqualified (ie. they did not have teaching certificates, diplomas or degrees) and those that were academically un- or underqualified (ie. they did not have sufficient subject content training). Teachers who did not have their Senior Certificate (Standard Ten or Matriculation) could attend courses at the department's fifty-one adult education centres while teachers with Matriculation certificates were encouraged to register for part time study towards degrees or diplomas at colleges or universities. Correspondence universities such as the University of South Africa (Unisa) or Vista University were the most popular choices, although part-time evening classes at residential universities such as Natal, Durban-Westville, and the Umlazi campus of the University of Zululand were also well supported (Louw & Bagwandeen, 1992: 301).

The second level of teacher in-service training was aimed at the employees' competency in their subjeets. This type of training took the form of short courses focusing on aspects of the syllabus. The DET, until very recently, opted primarily for a centralised Inset model centred on their in-service training centre, located first at Mamelodi and then later at the Shoshanguve campus (Hartshorne, 1992: 264-269). Here, teachers from all over the country were given short courses in subject content and methodology. Hartshorne argues that the quality of the courses and materials presented was high, and often innovative ideas were used, including video and audio cassettes and computer-aided instruction. However, there were a number of difficulties with this model of Inset.

Hofmeyr identifies the physical and/or mental removal of the teachers from overcrowded classrooms as a major concern (cited in Hofmeyr & Jaff, 1992: 176-177)[21]. Coupled

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21 This was certainly a factor amongst the teachers in the schools involved in the present study. On numerous occasions Medu staff were asked to assist teachers with their Vista assignments during class time, and B.Ed students from the University of Natal would often work on their assignments and readings during school hours.

with this difficulty was the lack of impact much academic 'upgrading' had on classroom practice. Because of the structure of salary packages and their linkage to the academic and professional qualifications of the teacher concerned, much of the studying done by teachers had little or nothing to do with issues of classroom practice. The pressure to improve qualifications resulted in teachers taking subjects that were considered 'easy options' - many that have no bearing on education at all such as criminology, biblical studies and mercantile law (Hofmeyr & Jaff, 1992: 177)[22]. This was exacerbated by regulations that did not recognise courses being taken in subjects already covered by earlier qualification. Thus, a college-trained history teacher wishing to do a degree would not gain recognition for history courses taken towards the degree, as these had been supposedly covered in the diploma.

Many of the courses on offer in degree programmes such as the Bachelor and Master of Education were highly theoretical and abstract and had little immediate practical value for teachers wishing to improve their classroom practice or their subject content knowledge. Thus, while the teacher may have beeen registered for a B.Ed degree and on completion would have been considered more qualified by the department, there was a widespread perception that the most tangible impact on the classroom was the removal of the teacher from the 'chalkface' while s/he struggled to make sense of educational theory.

Departmental courses that did address either methodology or subject content often did not carry any financial or promotional recognition. While some of these courses were reported to be of high quality, they were invariably "prescriptive (and) top down" (Hofmeyr & Jaff, 1992: 177). Hartshorne identifies this as the major weakness of the DET Inset programmes. There had been little or no involvement of the teachers themselves in the identification of needs and the planning and implementation of the

22 Experience at the University of Natal reveals a similar trend even within education related subjects - the Diploma in Special Education (School Librarianship) is inundated with applications from teachers who have little interest in, or prospect of working in the area of school libraries (Pers.comm, Medu management committee member and lecturer in information studies, 15/3/93).

programmes. No partnership existed between the various teachers' organisations and the department in the field of Inset provision (Hartshorne, 1992: 270).

During the early 1990s there was a growing recognition by the DET that the highly centralised model of Inset provision was problematic (Hartshorne, 1992: 270). This led to an increasing devolution of the responsibility for Inset to the circuit level and a phasing out of the in-service College. Circuit inspectors were now expected to play a central role in Inset provision and the DET aimed to set up local Circuit Teachers' Centres to act as a local resource base for this work (p.270). However, the form of Inset at the local level continued to ignore the teachers in the setting of priorities and objectives. The aims of the Circuit Teachers' Centres, as spelt out by the DET, serve to illustrate the gap between the needs of teachers in schools such as those described in Chapter Four, and the type of in-service support the DET provided:

> ... to keep abreast with the latest developments in regard to subject didactics; to receive assistance in the preparation of lesson material and diverse teaching aids; to get acquainted with the use of sophisticated apparatus; and to obtain transparencies, colour slides, sound tracks and video tapes on a loan based system ("DET 1986 Annual Report", cited in Hartshorne, 1992: 270).

Where two of the three schools described in Chapter Four did not even have electricity, it is little wonder that many of the teachers participating in Medu's various programmes described the DET in-service work as irrelevant and a waste of time.

Although the decentralisation of Inset was a positive development, which will in all likelihood be carried into the new departments[23], there are some dangers. It is likely that Inset will now be centred around the urban areas and that the larger, more sparsely populated circuits will receive less attention. It is in the rural areas that the vast majority of underqualified teachers are to be found and they may well remain outside of the

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23 A component of the Reconstruction and Development Programme's Culture of Learning section proposed the establishment of well-funded, high-technology teachers' centres as resource bases for teacher development work (RDP Culture of Learning National Co-ordinating Office, 1995: 3-6).

localised Inset provision system. Lack of local expertise may also hinder the Inset programmes within circuits and Inset provision may be relegated to a secondary place in crisis-ridden areas. Certainly in Pietermaritzburg, the initial consequence of the decentralisation of Inset by the DET was the singular lack of any departmentally organised in-service programme. In informal discussions with local circuit inspectors, they acknowledged that they did not have the capacity to run effective Inset and were looking increasingly toward the non-governmental sector to take on this responsibility (Pers.comm., DET Circuit Inspector, 22/10/92). Ndhlovu's (1993) study, carried out in the same Pietermaritzburg-Msunduzi region, of the introduction of communicative language teaching as the methodology for the English syllabus shows how a lack of Inset resulted in little or no change in classroom practice.

Despite the problematic nature of the DET in-service work, it is necessary to highlight the substantial reduction of the number of un- or underqualified teachers employed by the DET. Between 1983 and 1989 the percentage of teachers having less than a Senior Certificate was reduced from 74% to 34% (figures cited in Hofmeyr & Jaff, 1992: 176).

Department of Education and Culture, KwaZulu

While there is evidence of much support within KwaZulu's DEC for Inset, there is no clear policy or programme for implementation (Louw & Bagwandeen, 1992: 300). Alex Thembela, former Professor of Education and now vice-Rector of the University of Zululand, as well as a long time president of the Natal African Teachers Union (Natu), had been an influential figure in popularising teacher development in schools within the DEC jurisdiction[24]. However, despite a critical approach to Inset and strong advocacy for school-based staff development, there was little evidence that his ideas were put into practice by the DEC (Mkhize, 1989: 47).

Mkhize's review of 'upgrading' in Natal and KwaZulu reveals a similar picture to the one described for the DET (1989: 47-65). The primary focus of in-service work had been the

24 A number of principals of DEC schools around Pietermaritzburg that were interviewed had copies of his 1991 paper and were very enthusiastic about in-service work.

improvement of qualifications, largely through the same bodies mentioned above. About 45% of the DEC's teachers did not have matriculation certificates together with some form of professional qualification (Louw & Bagwandeen, 1992: 302). For the education department with the second largest numbers of pupils countrywide, this was a serious state of affairs[25]. Added to the poor level of qualification,

> other factors such as the characteristically huge, mainly rural, enrolment, scarce resources, poor communications, inadequate administration and low morale in their aggregate contribute to making the KDEC generally lag behind other national and independent homelands in respect of both teacher education and INSET (Louw & Bagwandeen, 1992: 302).

Like the DET's Shoshanguve college, the DEC set up the Umlazi In-Service Training Centre and the Siza Centre in Madadeni to run upgrade and in-service courses for teachers. Teachers from all parts of KwaZulu attended courses on subject content, methodology, and update courses when syllabus changes occurred. The Umlazi centre was closed for similar reasons that the Shoshanguve centre was closed - "lack of teacher involvement, reaction against authoritarianism, inadequate resources, shortage of time..." (Louw & Bagwandeen, 1992: 304). The training centre was replaced by the Umlazi College of Further Education which provides upgrade courses primarily through distance education. Recently, this College has been experimenting with mentor-assisted upgrading programmes that emphasise the teacher's context and try and avoid removing the teacher from the classroom (Pers.comm., Deputy rector Umlazi College of Further Education, 22/5/92).

The KwaZulu DEC had also entered into a partnership with the Natal College of Education (NCE) which was administered by the Natal Education Department (Haw, 1995: 83). This pre-service teacher training college was due for closure when it was turned into a distance upgrading college offering a range of courses and Further Diplomas

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25 The Research Institute for Educational Planning (RIEP) gives the total number of pupils enroled in DEC schools as 1 652 613 in 1992. This comprised 15,6% of all pupils in South Africa and was only surpassed by the national DET which had 23,8% of the total pupil enrolment (Strauss *et al*, 1992: 5).

of Education by correspondence. Clearly the vast distances that needed to be covered by teachers had they wished to attend residential institutions meant that distance education had to be a central component of any in-service work. However, a centralised distance curriculum made a school-focused approach very difficult and posed the same difficulties mentioned above in relation to Vista and Unisa courses, namely assignments done during school time, lack of relevance to specific contexts, and lack of support.

Financial commitment by the state

Dove shows that developing countries spend between 5% and 15% of their education budget on teacher training, including Inset (cited in Hofmeyr & Jaff, 1992: 176). While the divided nature of the education system and the hidden costs of teacher training make it difficult to assess the precise percentage of the budget dedicated to teacher development, it appears that the figure does not exceed 5% of the budget. This is perhaps indicative of the relative neglect of Inset in the past. With the transformation of the education system and the increasing pressure on NGOs to become self sustaining, there is likely to be an increase on Inset-related expenditure in the future.

Inset Provision by the Non-governmental Sector

The non-governmental sector encompasses a diverse range of organisations which have entered the Inset field for a number of different reasons. NGOs can also be divided into a number of different categories, and as will be shown, each of these categories tends toward a different model of Inset provision.

University-based Inset Programmes

Beside the formal state-subsidised courses (such as B.Ed, M.Ed and Further Diploma courses) many universities throughout South Africa have Inset programmes attached to them that do not offer formal accreditation.

These programmes take on various forms and each has a unique focus. Many projects are linked to research programmes initiated by academics and there is thus a strong emphasis on the production of written evaluation reports. These projects often operate as case

studies and are intended to act as examples of possible wider Inset interventions rather than aiming significantly to impact on practice on a large scale. Consequently many projects work with small groups of teachers and focus on curriculum change or alternative curricula rather than attempting to reconstruct the broader system.

There is a second type of Inset organisation which is based at universities for different reasons. This type of organisation was initially located on campuses for strategic political reasons related to access and security, but was not centrally linked to the functions of the universities concerned. However, these organisations shared many similarities with the first group of independent Inset organisations discussed below.

Whether the programme was an academic's research project or an independent organisation based at the university, the type of conditions (part-time or short-term contracts with few benefits) tended to attract younger staff. Hartshorne points out that,

> apart from anything else they were able to achieve, [these projects], are an excellent training ground for younger academics who are interested in applied, action or participatory research. A pool of expertise has been built up which should be of great value to educational innovation and change in the future (1992: 275).

The same might be said about the staff of organisations that are not based at universities.

Independent Inset Organisations

These organisations are independent in the sense that they have their own management structure which is not linked to either an education department or a university or part of another organisation. However, these organisations are obviously not entirely independent as they are constrained to a large extent by the availability of funds and the nature of their funding source. Furthermore, the type of management structure often impacts significantly on the work done by these organisations.

'Progressive ' Organisations

The 1980s saw a proliferation of small NGOs that aligned themselves openly with the anti-*apartheid* struggle. Funded either by the churches or through overseas funding

agencies, these organisations became a haven for activists as their church and international linkages gave them a degree of protection against the repressive state apparatuses. The education sector too enjoyed a significant increase in these types of organisations as the international community identified the education crisis as a useful (and safe) point of intervention.

A number of these NGOs chose to locate themselves within the institutional framework of universities although they received little or no funding from the university. This mutually beneficial, although never tension-free arrangement meant that NGOs could draw on the resources and infrastructure of the universities and use the legitimacy of the university to gain access to schools, while the university benefited by visibly demonstrating 'community involvement' and 'relevance' (catch words which strengthened the universities' abilities to raise funds internationally.)

However, whether those progressive NGOs were housed within universities or elsewhere, they all had management structures which attempted to involve the target group (in the case of Inset, teachers) in the identification of priorities, setting of goals, as well as the day to day management of the structure. Despite the difficulties of a more collaborative approach, this marked a significant departure from government department programmes in that a degree of 'ownership' of Inset resided with the participants.

Progressive NGOs tended to have a fairly explicit political agenda and often openly aligned themselves with organisations such as the NECC and philosophies such as people's education. This placed them in contradictory positions, for while they wished to distance themselves from the DET and other state departments, it was virtually impossible to work effectively if these departments refused to co-operate. Furthermore, since foreign funding was at best erratic and unpredictable, there was an increasing need to raise money from local sources, either from the participants or from industry. The latter, although willing to fund education initiatives, were interested only in nonpolitical organisations. It is for this reason, and the post-1990 loosening of political activity, that the progressive NGOs have moved more and more into the main stream of educational Inset, and it is for the same

reason that many business-sponsored initiatives emerged in tandem with the progressive NGOs.

Corporate-funded NGOs

> Recently INSET has become a central focus of corporate social responsibility funding. Apart from extensive funding to NGOs working in the field of teacher development, the private sector has taken responsibility for setting up its own programmes for INSET... The motivation for this extensive involvement is the hope of achieving a 'multiplier effect' which will improve the quality of black education and ultimately produce a better educated work-force (Nepi, 1992b: 37).

Indeed, as an example, in the period from September 1986 to June 1988 the Mobil Foundation spent R1,5 million on Inset, a commitment matched by a number of other companies and continually being increased. The Urban Foundation, an NGO set up by the business community to improve conditions in urban areas, has extensive Inset programmes in primary, pre-school and science education, and was one of the major backers of the Teacher Opportunity Programmes (TOPS) which by 1990 had 40 centres countrywide and a budget of about R2 million.

Particularly mathematics and science education have received massive injections from the private sector because of the disastrous maths and science results in the DET and other 'African' education departments. The Science Education Project (SEP) was jointly funded by the Anglo-American and De Beers Chairman's Funds. In Natal, projects such as the Centre for the Advancement of Science and Mathematics Education (CASME, previously the Shell Maths and Science Centre) and the Primary Science Programme are funded entirely by the private sector.

Inset Policy

Inset "is becoming a powerful strategy for changing the schooling system in South Africa" (Parker, 1988/89: 99). Despite its limited success so far, there is a growing awareness in both the state and non-governmental sectors that Inset will play a major part in the alleviation of the education crisis. For purposes of this study there is a need to

examine different policy options for teacher development. It is clear, as Walker puts it, that,

> (e)ffective teachers will not simply 'break out' in the event of democratic political change. Curriculum change is awesomely complex. To be effective practitioners of people's education, teachers need to be critical and reflective, to be involved in debate, deliberations and decision making, to be aware of a range of models of quality practice. One cannot assume that political awareness on the part of progressive teachers is necessarily or easily translated into progressive classroom practice. Indeed, there is often a disabling gap between political and curriculum practices. Teachers trained and schooled in apartheid institutions are not well equipped to facilitate critical and dynamic learning (Walker, 1991: 166).

The above quotation highlights the essential link between the political or ideological aims of an education system and the type of in-service training that is required. The dominant approach in the literature is to refer to Inset as an unproblematic positive idea and to lament the lack of co-operation and coordination between different Inset agencies. There are good reasons for the lack of co-operation - the agencies aim to achieve different goals with their Inset programmes.

In order to discuss Inset policy it is necessary to identify the rationale for the Inset. It may be true that all Inset attempts to change teachers, but the model of change adopted and the purpose of the change may differ widely. For example, a corporate-sponsored science education programme is primarily interested in improving the efficiency and quality of science teaching in schools. The aim is to produce more and better science graduates who will then move into the business sector. A 'progressive' teacher organisation aligned to the NECC may identify the promotion of 'democratic' methodologies as its primary purpose, and be less interested in immediate results such as a higher pass rate. The aim here is to equip teachers to transform the system, not to simply make the existing system more efficient. Parker identifies three approaches to change that will be developed further in the next chapter:

> The first approach emphasises the use of coercion through political, economic and administrative structures to bring about change. In South Africa this power/coercive strategy is the dominant state strategy. The second approach emphasises the importance of rationality and the

centralisation of decision making, as in, for example, the research, development, and diffusion mode. The third approach emphasises the importance of values, an action research methodology and the ownership of the innovation by the teachers (Parker, 1988/89: 100).

These models of change are not explicitly spelt out in any of the current policy proposals. The (previous) government-sponsored Education Renewal Strategy Discussion Document (Department of National Education, 1991a) mentions Inset only once, and only in the context of pre-service training. The Nepi (1992c) report on teacher education has a much stronger emphasis on Inset than the government proposal, but still remains largely abstract. The Nepi report poses three possible options for teacher education provision:

- an expansionist policy prioritising numbers of teachers to enable universal primary education;
- a renewal policy prioritising upgrading of unqualified and underqualified teachers and Inset on curriculum change;
- a holistic development policy focusing on sectors such as adult basic education (Nepi, 1992c: 66-87).

Clearly the second option places a strong emphasis on Inset for existing and new teachers. The general thrust of the report favours an approach which sees pre-service and in-service training as linked rather than distinct entities.

Given the general thrust of policy documents advocating Inset, it is necessary to examine the question of who will deliver the programmes. Hartshorne (1992) and Hofmeyr and Jaff (1992) both advocate a mixed model of provision with both the state and the NGOs working in partnership. However, Hartshorne cautions against too great an emphasis on co-ordination as he sees this as synonymous with the state stepping in and taking control (p.277). Hofmeyr and Jaff argue that the state should play an enabling role which will maximise the contributions of the Inset agencies (p.190). The Nepi report recognises the state's responsibility for Inset in its budget proposals - the budget for teacher education should be split to cater for Preset and Inset, and the Inset budget should be further divided with funds being set aside for the partial subsidising of NGOs (1992c: 71).

The official policy proposals do not deal with the form and focus of Inset although Nepi has a strong thrust toward distance education. Hofmeyr and Jaff advocate "school

focused" Inset as the most effective form as it is a practical compromise between the traditional course-based Inset and school-based work and they suggest an emphasis on the primary sector. Hartshorne echoes their thought:

> ... INSET will be most effective when its major concern is for the teachers and the schools in which they work, and not for the system (1992: 279).

It is this approach which the NGOs have tended to emphasise in their work and thus it is crucial that their experiences are critically examined. The biggest challenge these organisations face if they wish to make a significant impact will be moving their small programmes to scale, ie. involving significant numbers of teachers in their programmes to make them viable, while retaining the active involvement of the participants in the planning and implementation of their programmes.

To date no coherent national Inset policy exists. It seems crucial that this is prioritised to enable the various role players in the Inset field to begin working out a national programme for implementation.

Conclusion

The picture of Inset as it stands is bleak. A large degree of consensus exists that there is a critical need for Inset. Statistics show that in South Africa, including the various homelands, fewer than 3% of teachers in 'African' schools have degrees and suitable qualifications, and as many as 10% have less than a standard eight pass. The remainder are spread between these two extremes (Pillay, 1990: 40). The opportunities for these teachers to improve their qualifications are limited and often result in a neglect of the pupils as teachers seek to improve their paper qualifications.

Underqualified and unqualified teachers are not the only constituency for Inset. Many qualified teachers have been trained in institutions using Fundamental Pedagogics as their theory of education (see Chapter Two). As Enslin argues, Fundamental Pedagogics is diametrically opposed to concepts such as people's education and needs to be challenged (1991). As Walker suggests, "the dominance of oppressive education relations -

teacher-talk, drill and practice, corporal punishment and rote learning - still holds sway..." (1991: 158).

Even the few teachers that have escaped the Fundamental Pedagogics net should not be excluded from future Inset provision. It is standard and accepted practice in the developed countries of the world, where initial teacher training is often a more rigorous process, that teachers require ongoing support in the form of education and training. This is part of the teacher's professional education (not to be confused with the narrow professionalism argued for by Thembela, 1991: 4). All teachers should be entitled to Inset, and Inset is one vehicle which can be used effectively to introduce a new education system.

The DET and other education departments offered very little in respect of useful Inset. This was usually supplemented by a myriad of small and unco-ordinated NGOs offering a range of alternative methodologies and materials. Where Inset did occur, it usually took the form of workshops lasting part of a day where the teacher concerned was removed from her school for that period, inundated with new ideas, and then sent back to her school. The expectation was that she would apply the theories she had been taught. There was seldom any support, follow up, or opportunity for teachers to give feedback on the material they had been given.

It is within this context that the Midlands Education Development Unit was set up. It is to this unit, and a specific type of Inset intervention, that the discussion turns.

CHAPTER SIX

THE MIDLANDS EDUCATION DEVELOPMENT UNIT

Introduction

This chapter seeks to locate the Midlands Education Development Unit (Medu) within the debates about Inset outlined in Chapter Five. The history of the organisation will be examined, as will its explicit and implicit aims and assumptions, and its notion of Inset work.

Background to the Unit

The Midlands Education Development Unit (Medu) was officially established in October 1989,

> as a joint university - community project to address three fairly specific issues, namely:
>
> a) To translate people's education rhetoric into a methodology, syllabus and school control structure that is democratic and workable.
> b) To address the urgently articulated demand for the development of a larger corps of skilled African researchers.
> c) To monitor the crisis in the formal education system locally and document the information necessary for informed intervention (MEDU, 1990e).

The 1989 Medu Draft Proposal outlines the context which led to the establishment of the project (MEDU, 1989: 1-2). First mooted by academics and concerned educationists as an intervention in the deepening crisis in education in the Natal Midlands during the late 1980s, it was initially envisaged as a broadly-focused education support structure for both teachers and pupils. Thus in its initial year of operation it worked with teachers, student organisations, displaced pupils, informal tutoring projects and literacy groups. It responded to requests received from these various sectors and catered to their needs on a fairly ad hoc basis.

However, from the outset the unit was envisaged as more than simply a crisis management organisation. The 1989 Medu Draft Proposal places equal emphasis on the longer term needs of developing a 'post-*apartheid*' education system. Medu's work in the formal education sector was aimed at developing "a more creative and empowering learning ethos" and was committed to the "search for a progressive teaching ethos that will be able to contribute to the building of a democratic post-*apartheid* society" (1989: 2). The 1991 Medu Constitution goes one step further in spelling out the ideological roots:

> Medu allies itself with those organisations working towards an appropriate and democratic education system in South Africa and is guided by the National Education Coordinating Committee's notions of a "people's education" (1991a: 2).

These roots have important implications for the types of projects initiated by Medu.

Programmes of the Unit

Staffing

Starting off with one full-time person the unit expanded in the three years to seven employees and a number of interns. As was typical of most organisations of this type (Hartshorne, 1992: 275), the staff tended to be young, with little experience, remaining for one or two years and then moving on. This was primarily because the jobs were short term (initially people were employed on one-year contracts with few benefits) and the remuneration was well below that of teachers. This meant that experienced teachers were unlikely to leave their departmental posts, with housing subsidies and other benefits, for tentative jobs in the unit. A high degree of staff turnover in the first three years hampered Medu's ability to build on its achievements. Affirmative action, both in terms of race and gender, were also stressed, resulting in the more experienced members of staff having to spend significant portions of their time on staff development.

Resource provision

A central focus of Medu from the outset was the establishment of an education resource centre:

> When you talk education you talk resources. The trouble is there are no resources in the townships. We are developing what we call box libraries, literally a box filled with information - books and pamphlets on a specific subject. How to sustain an organisation, for example, or aspects of South African history. We are also attempting to repackage the material to make it more accessible (NU Focus, 1990: 6).

The resource collection comprised both traditional syllabus-related materials such as text books as well as substantial, largely theoretical literature on alternative education theory and methodology. From the outset the resource collection was envisaged primarily as a support base for Medu's other projects.

Teacher development programmes

The core activities of Medu during the period under discussion were the teacher development programmes. These consisted of the school-based programme (which will be examined in detail in Sections Three and Four), a number of materials development groups consisting of groups of teachers and academics working together on the development of subject specific materials, and a subject seminar programme consisting of short courses and one-day seminars around particular methodological or content issues. General seminars of interest to teachers (dealing with policy, international experiences etc.) were also held on an *ad hoc* basis.

Dialogue programmes

A second major thrust to Medu's work was what Medu called the dialogue programme. The most high profile activity consisted of an ongoing teacher exchange programme where teachers from various racially segregated departments spent a day in each other's schools, and then spent another day sharing their impressions and experiences with each other. Although the programme was very popular amongst teachers and the experiences were enlightening, the Unit stopped the programme after two years. There were a number of reasons for this. Firstly, although there were instances of follow up activities, by and

large there seemed to be few signs of sustainable contacts developing. Once the teachers returned to their schools they lost touch with each other and it required the unit to bring the teachers together again. Given the numbers of schools involved and the problems with communications, this coordinating role was beyond the capacity of the unit. Secondly, and more importantly perhaps, there was concern in the unit that the exchanges were reinforcing stereotypes about 'black' and 'white' education which the exchanges were intended to break down. Many of the 'white' teachers focused solely on the problems of 'black' education and failed to reflect critically on their own schools. This was coupled with a lack of confidence on the part of 'African' teachers to criticise NED, HoD and HoR schools. The entire programme then focused on the ways in which the city schools could help the township schools rather than examining what teachers could do jointly to improve education across the spectrum. Certainly the programme highlighted the fiscal and resource problems that DET and DEC schools faced and there were positive benefits. School A received a substantial donation when a prominent NED school won a prize, and another Edendale school was targeted for electrification because teachers from a private school drew the Escom directors' attention to their plight. Nevertheless, in the final assessment of the project, little teacher development had been identified and the programme was abandoned.

A second component of the 'dialogue programme' was Medu's work with 'open schools'. These were the former 'white', 'Indian' and 'coloured' schools which had begun accepting pupils of other races after the relaxation of *apartheid* legislation in the early 1990s. Medu ran workshops and courses on second language learning, student support, anti-racism, language policy and a range of other issues that were of concern to these schools.

The programme for 'open' schools was controversial amongst the staff and is a useful illustration of some of the tensions within the unit. The 'open' schools make up less than 10% of all schools in South Africa, yet they have dominated much of the discourse about schooling in the early 1990s (see Penny *et al*, 1993). The primary reason for this is that they are the schools of the elite, and the elite have access to the media, to education institutions and research units. Secondly, there is an obvious desire that non-racial

schooling should succeed, and the problems experienced by the 'open' schools have become a matter of some concern both to the schools and the wider public. Medu was constantly requested to assist teachers in coping with the difficulties of teaching first and second language learners in one classroom. Principals invited Medu to address their staff about the problems of 'open' schooling and on occasions Medu was approached to suggest names of 'suitable' teachers from township schools who might be employed by the formerly 'white' schools. Although these were direct requests from teachers, members of the unit felt that it would be incorrect to focus substantial energies toward schools that were by and large well resourced while there were schools in Edendale which had been dramatically under-resourced. However, work with Edendale teachers had proved to be difficult, with numerous workshops having to be called off at short notice and attendance being poor, while the 'open' schools work was well supported, financially viable (schools were prepared to pay for their teachers to attend), and high profile. It was also precisely this type of activity which would interest funders keen on promoting inter-racial dialogue during the period of South Africa's negotiated transition. The 'open' schools work resulted in much debate amongst staff about perceived need, actual requests, funders' influence and the overall aims of the unit.

A similar tension manifested itself in relation to another component of the dialogue work, namely the newsletter, *Teachers' Forum*, distributed to all schools in the midlands. Originally conceptualised as a forum for teachers from different education departments to be exposed to each other and to explore unity moves within the organised teaching profession, it proved difficult to identify a clear target audience for *Teachers' Forum*. Language usage, editorial policy, and alignment to any one of the teacher organisations was constantly debated within the unit. Eventually the contradictions led to resignations and a complete revamp of the magazine, primarily focusing on teaching materials.

Informal education

As mentioned above, Medu also worked with informal tutoring projects, providing resource support and methodology training for the tutors. This work was reduced once the Refugee Education Project, which was housed together with Medu, was incorporated into the Natal Tuition Project. As Medu's programmes became more focused and targeted at

secondary school teachers, so other components of its work, such as literacy, were closed down or transferred to more appropriate organisations.

Organisational Form

The description of Medu's work and some of the tensions surrounding its target constituency and direction are illustrative of the type of organisation Medu was. Drawing on the distinctions made in Chapter Five, Medu can best be defined as an independent NGO based at a university for strategic reasons. Indeed, the physical location of Medu was constantly assessed and the benefits of being on campus weighed against the disadvantages. The university provided a secure base with infrastructural backup such as financial systems, office space and access to expertise. Furthermore, there were distinct advantages to being associated with the university when it came to negotiations with authorities such as the DET. An independent organisation strongly allied to the NECC may have had more difficulty in gaining access to schools. Being located in the building where large numbers of teachers were attending in-service courses such as the Bachelor of Education degree and where a new crop of teachers was being trained in the Higher Diploma course meant easy access to potential users without having to go to schools.

The disadvantages were in some senses the flip side of the same coin. The university bureaucracy and systems impeded the unit's ability to respond dynamically to specific situations. Although externally funded, posts needed to conform to certain university regulations and financial systems were cumbersome without ensuring that funds were not misused. The physical location of the unit on campus, away from main transport routes, meant that access was restricted to teachers who owned cars. This was a particular problem for the Resource Centre and courses and seminars offered after school hours. The association with the university also proved to be intimidating for teachers who had not trained at a university. Students (primarily HDE students) became the major users of the resource centre.

Accountability and 'The Community'

Finally, 'ownership' of the unit was complicated by its location within a university faculty. The university needed to ensure that the unit remained finally accountable to the faculty. On occasions differences between the Dean and members of the unit became heated, particularly in relation to overt political actions on the part of the unit. Furthermore, due to the historical origins of the unit, members of the university staff played an active role in the day to day management of the unit without being employed by the unit. This led to tensions between the full-time employees of the unit and individuals within the university. These often manifested themselves in differences of focus, with academics wanting to promote a research component and stressing the need for publications while the workers wanted to focus on the very practical activities in the schools. It was these differences that partly accounted for the diversity of activities that occurred under the unit's auspices.

Like many other NGOs, Medu emphasised democracy not only in its programmes but also within the organisation. Flat hierarchies and accountability to the entire staff meant that all members of the unit participated in decision making. The realities of this type of structure were that the unit spent a large amount of time meeting and debating to ensure that the whole staff were involved in the decision-making process. This ensured a strong sense of ownership of the unit and its work but also resulted in inefficient decision-making processes.

Despite these complications, all the reports produced by Medu (1989, 1990d, 1990e, 1991a, 1991b) emphasise that the unit was jointly owned by the university and the community and that the unit strove to be accountable to 'the community'. Who exactly the community was is not clearly defined in the reports but in discussions with members of staff during 1991 it became increasingly clear that educators were the primary grouping that the unit saw itself accountable to, followed by related educational organisations such as the NECC, Cosas, Sadtu and other progressive organisations. The exact mechanisms of accountability were not clearly defined during the period under discussion here, but subsequently a management committee consisting of representatives

from the university and representatives from an open User's Forum was constituted. With the strengthening of Sadtu after the union gained the DET's recognition, Medu began working far more closely with representatives from the branches.

Within the specific programmes there was a constant striving, albeit largely unsuccessful, to involve the users (teachers) in the running of the programme. The *Teachers' Forum* newsletter was supposed to have an editorial committee consisting of teachers who could advise the editor on content and policy. The subject workshops and materials development groups had core committees of teachers who ran the groups. Again, with a few exceptions, the intention was never achieved in practice.

Two points are worth discussing in relation to community involvement. Firstly, there is an ideological dimension to the notion of the community. The unit was attempting to reduce the power relations between themselves and the clients by entering into a partnership arrangement. As can be seen from the above aims, the unit advocated the NECC's notion of people's education and stressed the need for democratic practice in the school. In an article published in *NU Focus*, the acting director of Medu stated that democratic methodology is "the cornerstone of educational change in South Africa" (1990: 6). The organisation and management of the unit thus needed to put this notion into practice by involving teachers in the identification of their needs and the planning of Medu programmes.

Secondly, the emphasis on community involvement and control clearly points to a particular theory of development guiding the unit (Hoxeng, 1973). Medu reports repeatedly mention that initiatives should emerge from the community in order for them to be sustainable (see Medu, 1990d: 1). The concepts of sustainable community development emerged out of the critique of modernization theories. Modernization theories tended to emphasise economic growth and efficiency as the indicator of development and lead to a belief that one could simply upgrade and modernize the 'backward' or underdeveloped communities by importing skills and technology from the developed world. Critics argued that this approach created further dependencies rather than encouraging independence (Toh, 1988: 123) and lead to what Etling (1977) calls

"aeroplane consultants". These are experts brought in, usually at great expense, to assess the problem, often with a fixed solution in mind even before reaching the destination, where they tell people what to do and leave before any tangible results can be seen.

Critics of the modernization theory point out a number of difficulties with this approach. Primary is that modernization approaches such as Human Capital theory are not concerned with the people involved in the process of development as they focus primarily on economic indicators to measure development. This, the critics argue, reproduces the existing power relations within society (Carnoy, 1982; Nasson, 1990). Because the model for development is based on the history of the industrialised western world, modernization theorists fail to take account of the context in which the development is supposed to take place. There is also often an assumption that all the problems may be solved by expensive technology, thereby ignoring the resources that already exist within the community.

Within the modernization paradigm the development worker imposes foreign ideas from above rather than including the community in the process of finding the solution. At the level of teacher development the dominant methodology fell firmly within the modernization paradigm. Teachers were seen to be the problems because they were underqualified or poorly trained. Thus, what education authorities and many NGOs did was devise programmes to 'upgrade' teachers. More often than not this took the form of an expert running a workshop for teachers which was intended to give the teacher the necessary skill to teach her subject more effectively. These workshops invariably took place somewhere removed from the school in which the teacher had to work, thereby effectively ignoring the context. There was also usually very little opportunity for the teachers who had been 'upgraded' to either contribute to the process of deciding what the problem was, or giving any form of feedback on whether the course was useful.

Emerging out of the critique of the modernization paradigm was an alternative development strategy. The cornerstones of the alternative strategy were control of, and participation in the development process by the community that is developing. It was for this theoretical reason that Medu placed such strong emphasis on control by participants over the programmes. The deficit model, where the teacher (or community) was seen as

lacking, was replaced by a belief that the skills and resources existed within the community, and the role of the development worker was merely to facilitate a process whereby these resources were activated. A focus on basic needs, rather than technical skills needed by the economy, was also central. Thus, the environment in which the community existed became the starting point of the process (see Carnoy, 1982: 174; Toh, 1988: 125 - 132).

Conclusion

The cornerstones of Medu's approach to Inset can thus be summarised as democratic, non-hierarchical and participatory. The teacher is viewed as an autonomous agent who, given the right support can change because she wants to change. It is not a matter of making up a deficit of knowledge and skills in the teacher, but rather empowering teachers to recognise and draw out the skills and knowledge that they already have to improve their particular situation. In order to do this the teachers need to be involved in the decision-making process. It is to a more detailed exploration of how this notion of change and development is put into practice that we now turn.

CHAPTER SEVEN

ACTION RESEARCH AND TEACHER DEVELOPMENT

Introduction

This chapter traces the development of an in-service approach which has gained enormous support throughout the world and has become the dominant methodology of a particular sector of NGOs working with teachers in South Africa. Known as action research, it has on occasion been described as "the most *authentic* research methodology for intellectuals on the political left" (Luckett, 1993: 1). This chapter traces the development of this approach and describes the particular model of action research which has become dominant in South Africa.

The Historical Roots of Action Research

The origins of action research can be traced back to the work of social psychologist and sociologist Kurt Lewin in the 1930s (see Adelman, 1993). Lewin attempted to develop an alternative to the behaviourist management styles dominant within psychology at that time. He demonstrated that it was possible to achieve greater gains in productivity through democratic participation rather than autocratic coercion. The process of "systematic enquiry for all participants in the quest for greater effectiveness through democratic participation" (p.7) became known as action research.

Lewin described action research as a spiral of four steps: planning, acting, observing and reflecting. Lewin believed that this process could be applied to any situation in order to bring about improvement and change. An example by Lewin looks like this:

Planning:	I need to make communication in the office more effective. I shall issue weekly information sheets to the staff.
Acting:	I issue the sheets.
Observing:	Conversations with the staff indicate that they are more aware of the overall issues.

Reflecting: But I do not know what they think.
How do I get efficient feedback?
(cited in McNiff, 1988: 23)

The final question then leads into the second cycle of planning, acting, observing and reflecting which is likely to raise more questions to be examined.

Lewin's ideas gained acceptance during the 1940s and 1950s. Indeed, Lewin used these ideas to assist in the training of bomber pilots for the allies during the Second World War. However, during the post-Sputnik technology race and during the period of emphasis on theoretical research, action research was replaced by the research, development and diffusion model of change (Carr & Kemmis, 1986: 166).

Lewin had never focused specifically on education in his model, but it was in the field of teacher development that action research began to regain popularity. Central to this re-emergence of action research was the work of Lawrence Stenhouse in Britain (1975). Stenhouse started his work during the brief spell of Labour-led reform in 1967 when he directed the Schools Council Humanities Curriculum Project.

> The Humanities Curriculum Project aimed at establishing a liberating atmosphere for pupils in class. It emphasised the need for discussion, for close interpersonal relationships, and for the teacher to act as neutral chairman. It aimed at liberating teachers from rigid authoritarian roles (McNiff, 1988: 25).

From 1970 Stenhouse was based at the University of East Anglia as director of the Centre for Applied Research in Education, appropriately known as Care! East Anglia became a centre for the development of the concept of action research, and many of today's influential thinkers in the field such as Clem Adelman, Stephen Kemmis and John Elliot worked with Stenhouse at East Anglia.

> The central message for teachers was that they should regard themselves as researchers, as the best judges of their own practice, and then the natural corollary would be an improvement in education (p.25).

Despite the commitment to placing the teacher at the centre of the research process, in Stenhouse's practice the external researcher remained the expert who would do the final

interpretation and evaluation, albeit in conjunction with the teacher. Teachers thus remained the objects of the research, with emphasis being placed on co-operation between the teacher and the researcher, with "full-time researchers ... support(ing) the teachers' work" (Stenhouse, 1975: 162). It is clear that Stenhouse sees distinct roles for the practitioner and the researcher, and although calling for teachers to see themselves as researchers, is in essence arguing for what loosely could be defined as collaborative research.

Development of a Theoretical Basis for Action Research

It is the work of Stenhouse's followers that develop the concept further and advocate a far more radical integration of the roles of researchers and teachers. They also attempt to theorise educational action research and develop Lewin's simple cycle described above into complex schemas of action. (For a useful review of the work of Kemmis, Elliot, Ebbutt and Whitehead see McNiff, 1988: 26-42.) Perhaps the most influential text in the field was Wilf Carr and Stephen Kemmis' *Becoming Critical* (1986). This text, more than anything else, popularised the concept beyond the borders of the United Kingdom. Kemmis' move to Deakin University, and his work with teachers in Australia was central to establishing action research as a major movement there.

While Stenhouse (1975) and much of the earlier literature on action research tend to be manuals for teachers and researchers to use for implementation, *Becoming Critical* attempts to "offer ... a (theoretical) rationale by outlining a philosophical justification for the view that teachers have a special role as researchers" (Carr & Kemmis, 1986: 1-2). This is achieved by debunking traditional forms of research and drawing on the work of Jürgen Habermas to develop the notion of critical educational science. The theoretical link to Habermas' work is examined in more detail in Chapter Twelve.

This intervention by Carr and Kemmis profoundly influenced the debates about action research. No longer was action research an approach for people who were sympathetic to the needs of others and who believed in more democratic relations between researcher and researched as Stenhouse had developed it. It now had a philosophical justification couched

in the language of science. Lewin's original work was anathema to the new educational action research in that Lewin had seen it "as an externally initiated intervention designed to assist a client system" (Hopkins cited in McNiff, 1988: 33), which was essentially functionalist, while Carr and Kemmis' work was based on a rejection of both functionalism and interpretive educational research. Indeed, it is now Carr and Kemmis' definition of action research which is the most commonly cited:

> Action research is a form of self reflective enquiry undertaken by participants in social situations in order to improve the rationality and justice of their own practices, their understanding of these practices, and the situations in which these practices are carried out (1986: 162).

Differences do exist amongst the leading thinkers advocating action research, but this tends to focus on the nature of the action research cycle, the type of questions that need to be asked and importance of dialogue within the process. While Kemmis may stress emancipation, McNiff speaks about personal and professional development and the notion of living educational theory (1993). The essential difference is the degree of politicisation of the action research process. Carr and Kemmis (1986) and much of Kemmis' later work (1993) stress the essentially political nature of doing action research, because its theoretical core is the concept of human emancipation. Dean (1991), Easen (1985), McNiff (1988, 1993) and many others focus primarily on the personal and professional development and present a somewhat theory free approach. It is this latter approach which has been adopted by the teacher evaluation and development programmes in an attempt to professionalise the embattled teacher in the United Kingdom.

Action Research and People's Education in South Africa

In South Africa it is the former notion of action research which has been seized upon by academics committed to change as a vehicle for addressing some of the critical issues facing educationists. Action research promises two things: First it is a "strategy whereby teachers might improve their work" (Walker, 1990: 57). Few would dispute that there is value in teachers reflecting critically on their practice and making modifications to improve that practice. As Davidoff and Van den Berg argue, action research is "a way for teachers to do what they probably do anyway ..." (1990: 28). Whether teachers do indeed

do this is debatable, but they certainly should. At a technical level evidence exists that action research can lead to teachers developing "their teaching skills and the quality of their classroom practice in ways not previously imagined" (Walker, 1990: 60).

Secondly, Walker argues that practical skills are not the only gain that can be made from action research. If action research is linked with "an organised political strategy for educational transformation" (p.61) then it is possible that it can empower teachers to transform their practice in such a way that it becomes emancipatory for both the teacher and the student.

The notion of emancipation being central to the action research process resonated with the debates about liberatory people's education:

> The thrust for an 'alternative' form of in-service education was for a number of reasons, both historical and socio-political. In their rejection of Bantu Education the community of parents, students and teachers demanded a people's education based on nonracial, non-sexist and democratic principles... For those of us interested in involving ourselves in teacher education ... the questions became 'how does a teacher prepare pupils to participate in a democratic society?' and 'how does a teacher stimulate critical thinking in young children?'. These questions arose from our interpretation of what was being said by those interested in People's Education for People's Power (Flanagan, 1991a: 27-28).

Action research addressed a number of tensions that faced progressive educationists. As a democratic mode of research it seeks to enable those who are traditionally objects of enquiry to develop the capacity to examine their own practices. In doing this, they work out their own solutions to their own problems, employing their own language and concepts rather than those of 'experts'[26]. Action research thus offers participants the opportunity to gain greater control over their own lives and thus it is empowering and emancipatory. Melanie Walker saw the action research process as having "the potential to

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26 The question of 'experts' in the South African context is further complicated by the racial imbalance in the production of knowledge with the majority of researchers being 'white'. Allegations of white researchers 'using' black subjects for their own ends were often voiced within community organisations and the issue was debated heatedly within academic fora during the 1980s (Evans, 1990; Jansen, 1991).

re-insert teacher agency into the struggle within education for the transformative schools, which aims to transform self and social relations... rather than simply reproducing them" (1988: 150).

The highly politicised state of South African education during the 1980s was fertile ground for action research. In particular, the overtly political notions of action research advocated by Carr and Kemmis had useful parallels with Paulo Freire's notions of conscientisation which had informed much of the thinking behind people's education. Dialogic education and levels of consciousness (Freire, 1978) had striking similarities to the action research cycle. Starting with small groups of committed academics particularly in the Western Cape (Flanagan, 1991b; Walker, 1988; Meerkotter, 1993), action research projects flourished, albeit on a small scale, throughout the country during the 1980s and the process became the preferred methodology for many teachers doing their Masters degrees (see for example Pennefather, 1991; Mahabeer, 1993).

"In essence, any INSET activity rests upon a particular view of how change comes about or might be brought about" (Van den Berg, 1987: 16). While the authoritarian top down model of the DET ultimately emphasises coercion, and the research-development-diffusion model employed by many NGOs emphasises rationality, efficiency and centralisation, action research has a value driven notion of change, stressing notions of ownership, collectivity, co-operation, collaboration, and ultimately emancipation. Flanagan suggests that,

> (t)he tendency of the action research cycle is to cause those who work with it to question deeply their own justifications and habits of understanding. Its effect on practice is therefore profound because its essence is to penetrate superficial responses and to throw their effects into relief (1991a: 31).

It is thus supposedly inherent in the cycle for the participants to begin confronting the problem of their practice contradicting their stated educational values, and systematically addressing those problems by changing their practice.

Action research thus promises radical change through a process of self discovery, where the teacher investigates her own practice and improves it through a process which she

controls. This eliminates the need for authority figures or authoritarian measures in bringing about change, and because the process is directed by the teacher, there is a high degree of commitment to the change.

Conclusion

It is clear why this approach to teacher development gained so much support, particularly amongst progressive NGOs. It presented a well documented and theoretically argued methodology which fulfilled the NGOs' and funders' requirements of ownership by the participants, democratic process and radical change. It is for these reasons that Medu decided to adopt an action research approach in their school-based teacher development programme. Section Three below describes this programme in some detail.

SECTION THREE

CHAPTER EIGHT

BACKGROUND TO THE SCHOOL-BASED TEACHER DEVELOPMENT PROGRAMME

The "School-Based Teacher Development Programme" was a sub-project of the Midlands Education Development Unit. After some initial small scale attempts at introducing the programme during 1990, it was introduced in 1991 as a pilot study in one school (School A) for one year and was expanded to a further two schools in the following year. The unit intended systematically to expand the programme as it became rooted in the initial three schools.

The Teacher Development Programme emerged out of attempts in 1990 to run school-based methodology programmes in various schools in the Natal Midlands. Discussions had taken place in late 1989 in conjunction with the Institute of Natural Resources at the University of Natal in Pietermaritzburg, about Medu assisting in the support and development of teachers in the Table Mountain area. It was envisaged that HDE students would work together with teachers in the schools and they would mutually learn from each other. According to the minutes, a meeting, scheduled for 28 November 1989 to finalise the programme with principals, did not take place as "people were forced to stay at home because of threatened attacks." This was the first of a series of setbacks brought about by the outbreak of civil war in the Natal Midlands that drastically impacted on schooling in the region.

Medu had also negotiated with a school in the Maqonqo (Table Mountain) area which agreed to let the unit run a series of methodology workshops at the school. This arrangement had to be suspended in March 1990 (before any workshops had been held) due to the outbreak of violence in that area[27]. A proposal that teachers be brought to the

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27 The Medu notes dated 5 March 1990 perhaps best reflect the period:
- Fighting - attacked by mob.
- Mr Zulu (the MEDU contact person) - car burnt
- School hasn't been opened

university had to be abandoned because teachers could not be contacted and the school was closed indefinitely at the beginning of March. Negotiations with principals at KwaZulu-administered schools in the Vulindlela area also had to be suspended when the war devastated those areas in the middle of March 1990.

The programme was thus reluctantly moved to one of the few schools in Pietermaritzburg located in a township that was not directly affected by the war. East High[28] was a 'showcase' DET school and did not lack facilities and resources but demonstrated below average matriculation results. In a progress report to its funders dated 26 March 1990, Medu optimistically reported that "we are to hold our first 'problem-posing' meetings with teachers at the school next week" (MEDU, 1990e: 4). The next week violence broke out in the township concerned and the programme again had to be suspended.

According to the Medu Annual Report (October 1989 - October 1990) six workshops were eventually held at the school, during July and August 1990. These focused on experiential learning and people's education as well as teacher unity developments. These were attended by an average of ten teachers from East High as well as a number of displaced teachers from other schools around Pietermaritzburg. While the Medu Annual Report refers to the project favourably, members of staff involved in setting up the project and running the workshops were less optimistic (Pers.comm., Medu Co-ordinator and Teachers' Forum editor, 3/2/91). The workshops had not been attended by as many teachers as expected. The report suggests that this may have been because of the after-hours time slot and a suspicion of anything negotiated through the principal of the school.

The other major difficulty was dealing with the expectation of the teachers for something concrete to emerge from the workshops. Even though the school was perhaps one of the better-equipped DET schools in the Pietermaritzburg-Msunduzi area, there still was a tendency for teachers to expect material improvements to the bantu education legacy to

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28 The name East High is fictitious.

emerge from the project. There was thus a problem with transforming a concept such as 'experiential learning' into a workable classroom method.

The workshops tended to take the form of an input followed by discussions. There seems to have been a problem keeping the discussion focused on the topic and teachers tended to speak of the macro issues rather than examining their own practice (see MEDU, 1990a). The reports on the workshops seem to reflect this frustration concluding that, "(a)s an informal brainstorming session, this workshop was successful... There needs to be more of an emphasis on implementing People's Education in the classroom..." and "(t)here is a general reluctance to the implementation of sincerely democratic practices of People's Education [sic]" (MEDU, 1990b: 3; MEDU, 1990c: 3).

Although the 1990 Annual Report states that the project operated as an "informal action research project" there does not seem to have been a structured evaluation or follow up designed into the programme so there was no reliable feedback from the participants at the school. Although the participating teachers indicated informally that they felt that the workshops were beneficial, it is difficult to ascertain whether any impact had been made on classroom practice or whether teachers wished the programme to continue.

In March 1991 Medu expanded their staff and appointed a Teacher Development Fieldworker[29]. The responsibilities of this post were to set up and implement programmes designed to train teachers in 'new' methodologies. The part-time post made it possible for the unit to look at expanding the project quite substantially. It was planned to continue work at East High and to investigate possibilities of setting up the programme at another school in the Edendale circuit.

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29 The post designation of the Teacher Development Fieldworker changed repeatedly during the course of the programme's existence. The initial letter of appointment called the post Teacher Methodology Trainer, later it became known as the methodology workshops co-ordinator and later still Teacher Development Worker/Fieldworker/Co-ordinator. For the sake of uniformity the term Teacher Development Fieldworker is used throughout this work.

The process of selecting a school for the expansion of the project was relatively arbitrary. Considerations included the relative stability of the school, the disposition of the principal to the unit, and the differences between the new school and East High. The latter criterion reflected a desire to investigate the role that facilities played in student success. As mentioned above, East High was well endowed due to sponsorship from surrounding industry, yet continued to achieve below average results while many of the schools which were poorly resourced fared better in the final examinations.

The school that was selected was School A (described in Chapter Four). The major motivating factor for this school lay in the fact that the principal was a Bachelor of Education student at the University of Natal and thus readily accessible to the Medu staff, some of whom were studying the same course. As mentioned earlier, School A was administered by the Department of Education and Culture, KwaZulu at this time. However, due to the peculiar political circumstances in which these schools found themselves, the principal of School A had considerable discretion in determining who would and who would not work in his school, something that normally required permission from the relevant authorities in Ulundi.

Although School A had been in a location that had been badly affected by the 'Seven Day War', the area had stabilised substantially and the principal felt that it would benefit the school for the programme to be offered there.

Finally, despite the turmoil of the civil war and the poor facilities at the school (see Chapter Four), the results had nevertheless been better than those at East High and the unit felt that it would be a worthwhile research issue to try and identify non-material factors that might influence school success in the matriculation examination. Unfortunately, this question was never investigated as it became clear once the programme was in its initial stages at School A that there was not sufficient time to run the programme at two centres, and the staff felt that the Coordinator should focus entirely on School A for the year and examine the possibility of expanding the programme in 1992.

With the selection of School A and the employment of the Teacher Development Fieldworker planning began for the implementation of the School-Based Teacher Development Programme. Chapter Nine describes the conceptual plan for the programme while Chapter Ten details the actual course of its implementation during 1992 and 1993.

CHAPTER NINE

A CONCEPTUAL DESCRIPTION OF THE PROGRAMME

Introduction

The purpose of this chapter is to outline the particular notion of action research employed as a theoretical basis for the School Based Teacher Development Programme. In order to report on the conceptual framework as accurately as possible, reference will be made solely to the sources that were familiar to the Medu staff at the time the programme was conceptualised. The dominant influence was the work of educationists involved in various action research programmes in the Western Cape. Specifically, although at best a flimsy text, the booklet by Sue Davidoff and Owen van den Berg *Changing your Teaching* provided much of the initial impetus (1990). The second thrust of the programme was its school-based nature.

The programme was conceptualised by the Medu Teacher Development Fieldworker, in conjunction with members of the unit who had participated in the workshops at East High. Thus the planning of the programme was carried out, albeit tentatively, by the Medu staff without the participation of the teachers at School A. This weakness was recognised but it was felt that in order to gain access to the teachers and persuade the principal of the benefits of the programme, the unit needed to present a coherent and attractive programme for their consideration.

Programme Design

The programme was designed for an initial year-long cycle. An introductory workshop was designed for the School A staff to critically assess their situation and determine a number of issues which they wished to address during the course of the year. The focus of the programme was intended to be primarily on teaching methods which could assist teachers in overcoming some of the difficulties they faced in the classroom. Simultaneously, the unit hoped to begin implementing some of the aims of people's

education by offering methodological alternatives that stressed values such as co-operation, critical thinking and democracy.

Once the School A staff had prioritised the issues that were of concern to them, it was envisaged that the Teacher Development Fieldworker would design a workshop that would focus on one teaching method which might address the particular difficulty. This workshop would be designed in a way that would allow the staff to draw upon their own resources and experience and collectively produce suggested solutions. Once the workshop had been held the staff would attempt to implement the solutions in their classroom practice for a month. During this period the Teacher Development Fieldworker would be on hand at the school on a regular basis to provide material backup and support for the teachers involved in the programme. The teachers would carefully observe their own practice, sit in on each others' lessons, and use the Teacher Development Fieldworker where necessary to collect data about the new methods.

At the end of one month of trying out the new methodology the staff would hold another workshop together with the Teacher Development Fieldworker in order to evaluate the successes and failures of the given methodology. Once this had been reviewed and difficulties discussed and possible solutions found, the School A staff would then continue trying out the methodology taking the modifications into account. A month later, a new workshop would be held around another problem and the cycle would be repeated.

Action Research

This cyclical programme of reflection-action-reflection-modification is based on a notion of action research influenced by the work of Carr and Kemmis (1986). Davidoff and Van den Berg define action research as follows:

> Action Research is a way of taking a systematic, close, critical look at the way in which we teach, with a view to changing it so that the classroom experience becomes a more meaningful one for all those involved in it.
>
> Action Research is thus an attempt to link the action (of the teacher) with reflection on (or 'researching') that action. Put another way, Action Research is a way of trying out ideas in action, understanding those

> actions, and then attempting to make some improvements or changes in the classroom or school setting. The link between the action and the research is that they are both done by the same person, that is, the teacher (1990: 28).

Davidoff and Van den Berg spell out an action research cycle which teachers can use to research their own work in the classroom. The Medu programme used this as a broad basis and thus it is spelled out in some detail here.

According to Davidoff and Van den Berg the action research cycle consists of four distinct stages. Stage One is formulating a **general plan.** This involves:

> 1. Formulating the general idea;
> 2. Doing a reconnaissance exercise ie. assessing the constraints and possibilities in the situation;
> 3. Negotiating with the relevant people/parties;
> 4. Assessing the physical resources you require;
> 5. Having some sense of how you are going to work within the specified time; and
> 6. Planning how you are going to gather data (needed for the observation stage)
> (summarised from Davidoff & Van den Berg, 1990: 33-37).

The first stage is the process of formulating a research question around a particular problem that the teacher experiences in her classroom. It was planned that this stage would be collectively dealt with in the first workshop held with the entire staff where they would discuss and define their own difficulties.

Stage two of the action research cycle is **implementing your action step.** This involves:

> 1. Designing the action for implementation in the classroom;
> 2. Putting the plan into practice with the class (this occurs simultaneously with stage three)
> (pp.37-39).

This step would be covered during the second workshop conducted with the staff in which a specific problem identified in the general workshop would be addressed.

Stage three is **observing your action.** Davidoff and Van den Berg argue that what this step does is make the normal observations teachers make about their practice more

systematic, "so that the data is collected more carefully and with clear purposes in mind" (p.40)[sic]. This step involves:

1. Deciding what information needs to be collected;
2. Deciding how best to collect the necessary information (this can involve the teacher, the students, an outside observer using notes, questionnaires, interviews or tape recorders);
3. Actively understanding the data
(pp.40-43).

The programme was designed in such a way that teachers would have one month to implement stages two and three, gathering data from students, from their own notes and observations together with the Teacher Development Co-ordinator.

Step four, the **reflection,** is the final stage in the cycle. It consists of:

1. Sorting out the meaning of all of the data you have gathered;
2. Critically evaluating the consequences of your action;
3. Using this evaluation to help plan the next action cycle
(pp.44-46).

Clearly this is the central stage to the whole process as it is here that the potential for both improvement in teaching practice and the possibility of transformation lie. The programme structured this stage into the second evaluation workshop. Here the teachers would collectively discuss their various experiences, analyse them and make suggestions for improving their practice. The next cycle would be informed by the lessons gained from the first.

School-based teacher development

The second major influence on the programme was the growing body of literature stressing the need for school-based programmes rather than traditional forms of Inset which removed the teacher from their specific school context (see Dean, 1991). Much of this work emanated from the United Kingdom where the 1980s had seen an increasing focus on teacher development and evaluation within the school context. Each school was now seen as having very specific conditions that needed to be addressed,

and which tended to be overlooked when the teachers were removed from the context. Teachers who returned to their school after conventional in-service courses, often found that they were confronted with particular problems in their school which militated against the implementation of new ideas. Without a follow up and support programme, many teachers then simply abandoned the ideas they had been exposed to. The model of school-based teacher development attempted to counter this problem by locating the in-service training within the school where the teachers worked (for South African applications of this concept see Davidoff *et al*, 1994 and Schofield, 1995).

Conclusion

One of the major problems is that institutional change is rarely achieved by one or two individuals attempting to promote change. The most successful examples of change within an institutional setting were found where the whole staff were involved in the process (Dean, 1991: 36). With everyone involved, the levels of stress related to the change tended to be dispersed amongst all the participants.

In the South African context these two issues seemed to apply even more. Schools fell under different departments, had different management systems, distinctly different sets of pupils and specific localised political pressures to contend with. Secondly, many teachers cited a lack of support and understanding amongst their colleagues as a major obstacle to implementing any form of change. From experience of some of the course-based work that Medu was doing, it seemed that a school-based teacher development programme was worth attempting.

With this broad conceptual base as a starting point, the programme was initiated at School A. From the outset it was clear that the planned programme would constantly have to be monitored and modified. However, the degree to which the implementation strayed from the plan was not anticipated. It is to a description of the actual implementation that we now turn.

CHAPTER TEN

DESCRIPTION OF THE PROGRAMME

Introduction

This chapter provides a detailed description of the actual course of the school-based teacher development programme for the period March 1991 to December 1992. Based on fieldnotes, minutes of meetings, annual reports, recorded interviews, and informal discussions with teachers and members of the unit's staff[30], the Chapter is intended to give the reader a clear sense of the course of the programme as it unfolded over the two years (see Appendix A for a list of interviews; Medu Reports are cited in the references). For that reason, analysis of specific events has been kept to a minimum. Detailed analysis of the programme will be undertaken in Section Four.

Before describing the programme it is important to re-emphasise the broader context of the Pietermaritzburg-Msunduzi region. Although the large-scale violent battles had ended, Pietermaritzburg-Msunduzi and the Natal Midlands generally remained amongst the most violent places in the country. The nature of the conflict had taken on an endemic character with low intensity, high-profile killings becoming the most common form of political violence[31]. These invariably led to public protests, mass marches and stayaways which severely disrupted schooling. During the course of 1992 all three schools participating in the programme lost between five and seven weeks of schooling because of these disruptions (Medu Annual Report, 1992).

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30 The programme was well documented throughout, primarily in the form of regular monthly reports to the Medu staff, annual reports and funding proposals. In addition, workshop notes and field-notes were kept by the Fieldworker who recorded many of the anecdotes generally excluded from the formal reports to staff or funders. Occasionally this was supplemented by recorded interviews, although these were kept to a minimum because of the sensitivities involved.

31 Assassinations became increasingly prevalent during this period with a number of senior ANC and Inkatha Freedom Party officials being killed (Aitchison, 1993).

Year one: The First Cycle

The first year of the programme ran as a pilot study and involved only School A. The first workshop was held late in March 1991 as the school had some difficulties in dealing with the vast numbers of students wanting to enrol. This was a result of the political polarisation which had occurred the year before after the 'Seven Day War'. Particularly the senior secondary section of the school was affected, with one standard 10 class eventually consisting of eighty-six pupils.

The Teacher Development Fieldworker had negotiated with the principal of the school about the structuring of the programme, particularly regarding the timing of the workshops. Timing had been identified as a critical issue for the success of the programme as, in the unit's experience, teachers tended to be reluctant to remain after school hours (this had posed a serious problem during the earlier workshops at East High).

The principal felt that it was important that the staff should determine when they wished to hold the workshops and for them not to feel that the programme was being imposed by him. He therefore asked one of the teachers (whom he described as "young and dynamic and willing to work and make changes" [fieldnotes, 11 March 1991]) to take on the role of liaison person. From then onwards, the principal of School A ceased to be involved in the organisational aspects of the programme and gave the Teacher Development Fieldworker freedom to proceed as he saw fit.

The school staff decided to hold the first workshop on a Thursday when the students left school early to participate in sports programmes. Three quarters of the staff attended the workshop. The purpose was to clarify the aims of the programme, ascertain what the teachers' needs were and plan ways of dealing with issues that arose. It was structured in the following way:

- An introduction to Medu, outlining its aims and objectives.
- Discussing and agreeing on the broad structure of the programme (as outlined in Chapter Nine).
- Listing the aims of teachers in the school.

- Identifying the obstacles that prevented the staff from realising those aims
(Adapted from fieldnotes, March 1991)

The Medu Co-ordinator attended the workshop and participated in the proceedings. The Teacher Development Fieldworker outlined Medu's aims and objectives focusing particularly on the context of a changing South Africa and exploring the possible implications of this for education. It was generally accepted by the teachers that education would have to adapt to the new conditions. Some discussion around the concept of people's education and what it meant followed. There was broad consensus that the teachers needed to work towards this as an ideal and that the programme should attempt to base itself on the principles of people's education.

The second part of the workshop consisted of a brainstorming session where the staff simply listed what they were trying to achieve when they taught. The following is a summary (in no particular order) of the main points, taken from the notes of the Medu Co-ordinator:

- Acquiring knowledge and skills.
- Teach people to be critical and solve problems.
- Teach them not to be submissive.
- Enable them to pass exams so that they can study further.
- Equip them to get good jobs.
- To become responsible adults.
- Tolerate racial differences.
- Gain confidence/ self esteem/ self identity/ self actualise.

Clearly it is almost impossible to ascertain in a workshop whether these were indeed the aims of the teaching staff at School A. When concepts such as "self actualisation" were probed a little further it became obvious that this was a fairly rhetorical answer. Most of these responses are typical of the teaching aims on which a number of South African teacher training institutions within the Fundamental Pedagogics tradition focus. It seems that in this particular instance the teacher was merely repeating a catch phrase from her/his initial training (see de Vries, 1986). Nell Keddie (1971) makes a useful distinction between the 'educationist context' and the 'teacher context'. When teachers articulate what they believe, they speak as educationists. Their actual practice, however, and the discourse they use when they speak amongst teachers often appears to contradict their

stated beliefs. Keddie argues that the former is very often informed by official policy and educational theory while the latter constitutes a common sense form of knowledge. These contexts are potentially and in reality often contradictory without appearing so to the teacher concerned. Since the workshop would locate the teachers in an 'educationist context', it is possible that their stated aims did not reflect their common sense understanding of schooling. Despite this, the Medu workers felt that the process provided a useful starting point for the teachers to begin to reflect critically on their practice. This would follow McNiff's (1993) suggestion that one way of framing the first stage of the action research cycle is as follows:

> I experience a problem when some of my educational values are denied in my practice (1993: 11).

The next stage of the workshop was to examine each of these aims and ascertain whether they were being achieved, if so how they were being achieved, and if not, why the teachers were failing to realise their own goals. The notes from the observing Medu Co-ordinator indicate that the teachers in fact felt that they were not achieving very many of their aims at all. The only one that they felt confident about was preparing the students to pass their exams.[32]

The reasons for not achieving their aims varied. Most teachers felt that it was important that all their students should study further. Ken Harley has shown that this is also the desire of the majority of students, despite the fact that there is a realisation that the high costs limit the feasibility of this actually occurring (Harley, 1985: 50; Gultig & Hart, 1991: 221). The inability to find better jobs when leaving school is also primarily an economic problem with unemployment in the Natal Midlands estimated conservatively at 50% (Gultig & Hart, 1991: 215). Both of these apparent failures are related primarily to structural problems as opposed to deficiencies in the quality of teaching. However, teachers had an overwhelming conviction that the only way for their students to be

32 It is interesting to note that despite the poor resources and the appalling conditions that the teachers were expected to teach in, the matriculation examination results from School A had been consistently higher than the Pietermaritzburg average (Pers.comm., School A Principal, 6/3/91).

successful was to attend university. A brief discussion was held during the workshop around the need to offer a range of school-leaving alternatives to students rather than glorifying university education. However, during planning discussions after the school visit, Medu staff felt that a longer term programme was needed to debunk the myth that success can only be achieved via a white collar career but it was felt that this was outside the parameters of the school-based teacher development programme.[33]

According to the School A staff who participated in the workshop, most of the failure to achieve their aims could be attributed to the lack of resources, the curriculum, and particularly the inability of students to acquire knowledge and skills (Coordinator's Notes, March 1991). The continued submissiveness of students was attributed to the sex roles that were imposed on women. Sex role stereotyping was seen as a problem located primarily outside the school, although one teacher did suggest that teachers should possibly not ask only the girls to clean the classroom, and girls should not have to wash the school soccer team's uniforms! The lack of books was identified as a further reason for pupils' submissiveness because it forced the students to rely entirely on the teacher writing the material onto the chalkboard.

One of the primary problems related to the achievement of aims such as 'critical thinking', 'gaining confidence' and 'self esteem' was the lack of participation. Reasons for low participation were given as follows:

- language (not feeling confident enough to speak)
- politics (ie. pupils afraid of revealing 'incorrect' political affiliation)
- syllabus emphasising written rather than oral communication
- attitude of pupils bad (simply not wanting to learn)
- shyness
- teacher not well prepared

(Co-ordinator's Notes, March 1991).

33 Besides the obvious effects of years of job reservation in the white collar section which has quite understandably led to a desire to enter into this part of the job market, very few schools offer any form of career guidance. The only visible role models available are teachers and nurses (Harley, 1985).

The final point listed above was the first time during the course of the workshop that any of the teachers saw part of the problem lying with them. This sparked a heated debate in the group as to whether the teacher was in any way to blame. Some of the younger members of staff suggested that the authoritarian style of teaching was problematic, but this suggestion was not well received by other members of the staff. It was ultimately agreed that teachers could not be blamed for not achieving their own aims.

This reluctance by teachers to locate any of the causes of the problems with themselves posed a serious problem for the programme as a whole. The notion of action research developed for the programme required a basic commitment to what Carr and Kemmis call self-reflective enquiry (1986: 207). Change would not be possible without the participants expressing a willingness to critically interrogate their own practice. If teachers were not prepared to admit any responsibility for the difficulties encountered in fulfilling their stated aims, then the programme would not be able to proceed.

When the question was put to the teachers whether they saw any role for the programme as it had been outlined, it received unanimous support. In a recorded interview with the teacher who had been asked by the principal to co-ordinate the programme, he suggested that one of the problems with the first workshop was that the teachers did not feel confident enough to expose their weaknesses. He identified 'shyness' on the part of teachers as a problem, both in the workshop and also in the classroom. "Probably you could organise workshops that could create confidence in the teachers themselves, because I mean, it is difficult for them to communicate with the pupils if they are not confident about what they are going to say" (Pers.comm., School A liaison person, 12/4/91).

The teachers decided that they would like the first workshop to address the question of pupil participation. The teachers agreed that they wanted the programme to run during the school hours because very few were able (willing?) to attend after school closed. Medu, however, had an informal policy of not taking teachers away from classes for its programmes, so it was eventually agreed that the programme would be run during the teachers' lunch break (approximately forty-five minutes). This time constraint obviously placed practical limitations on what could be covered in one workshop.

The first workshop was designed to explore the possibilities of group work as a mechanism for increasing pupil participation. After discussions with the Medu Co-ordinator, it was decided that it would be preferable in the workshop to approach the issue largely at the level of skills. The issue of pupil participation could potentially raise a number of broader issues about democracy in the classroom, discovery learning and other concepts which have been associated with the notion of people's education (see McKay & Romm, 1992: 131-157). Given the reluctance of teachers to see themselves as key agents of change, it was decided to focus primarily on concrete and practical ideas which teachers could implement. The critical reflection on the transformative potential would be better suited to the individual discussions with teachers once they were attempting to implement the ideas. The skills were drawn from Turney *et al* (1976; 1977) and White (1983) and discussed with the teachers. These were incorporated into a general discussion which also reminded the teachers of issues that had been raised during the first workshop[34]. The workshop was attended by fourteen teachers. The older teachers, all male, were noticeably absent.

The workshop briefly outlined some of the difficulties teachers were likely to face when trying to change their teaching style. One of the difficulties raised was the resistance from other teachers. As this had manifested itself in the initial workshop it was discussed at some length. The need for caution and the value of a support network were emphasised. Resistance from students and overcoming their own inhibitions were also mentioned. General strategies to overcome this were looked into and then group work was examined as a possible way of increasing student participation in the classroom. The major reservation raised was that due to examination pressure there was not enough time to use group work and cover the syllabus. Nevertheless, teachers did feel that they could use the strategy and agreed that they would try to implement it.

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34 The notes of the workshop taken by an observing HDE student who at the time was working for Medu as an intern are reproduced as Appendix C. Although these do not accurately reflect the progress of the workshop and do not indicate which points were made by teachers and which points were made by the Medu fieldworker, they have been left unaltered as they do provide some sense of what was covered in the workshop.

Over the next four weeks the Teacher Development Fieldworker regularly visited the school, discussing ideas with teachers. None of the teachers asked the fieldworker to sit in on any of their lessons even though he offered to do so on a number of occasions. Fieldnotes indicate that "it is difficult to get teachers to talk about their own practice" (May 1991). Much of the work of the fieldworker consisted of taking requests for resources from the teachers back to the unit. Medu acted as a facilitator in encouraging well-endowed schools in the city to donate 'written-off' text books and furniture to the school.

After a spate of disruptions and cancellations an evaluation meeting was eventually scheduled. This was attended by three teachers who had actively been trying to implement the group work methods. The reason that the rest of the teachers did not attend was that they had not been invited by the school's liaison person. He indicated that he had asked only those people who had tried to implement the ideas (Fieldnotes, June 1991).

The discussion with the teachers was recorded with their permission. The transcript of the discussion reveals a number of interesting aspects of the programme thus far[35]. The teachers involved all found the methodology useful. In fact, it was credited with fairly substantial results such as the pupils being "happy", and "working harder". The teachers repeatedly stated that the pupils participated more, and one teacher referred to a conversation with a student in which the student reportedly said: "Hey, this new method of yours, it makes all of us involved." A superficial view of the transcript would indicate that the first cycle of the programme had been successful.

However, closer analysis reveals much more. There certainly had been an increase in participation, but the nature of the participation needs further exploration. The English teacher said that only one or two were active out of a group of eight, while the rest were passive. Of course, passivity is not inherently problematic but the majority of pupils still did not seem to participate. Part of the reason for this passivity may be found in the way the groups were structured. Two of the three teachers appointed group leaders, choosing

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35 The transcript is reproduced as Appendix B.

them on the basis of 'promise'. The history teacher let the groups appoint their own leaders, who also became the dominant voices in the group. Instead of becoming a safe environment, the group tended to provide a space for the more confident students to talk, while the vast majority of the class remained passive.

While group work was new in the classroom, the way the teachers who were part of this particular evaluation structured their groups, and the type of activities that the groups were expected to implement, such as tests, tended to maintain many of the old-style educational practices. Hierarchies clearly still remained, and were actively reinforced by the elevation of the better students into group leaders. Further, the need to test and award marks was maintained on instructions from the teacher. Both of these aspects appear not to have been reflected upon.

There was a clear sense of expectation by the teachers of what Medu could provide. The opening question was: "What do you have for us today?" The discussion about group work was broken off at the end by a request for examination papers. There thus remained a dependency on Medu both to provide resources and to deliver the methodological 'goods'. It is unlikely that any form of evaluation (and the transcription reveals that it was hardly critical in its reflection) would have taken place had the Teacher Development Fieldworker not specifically requested it.

The transcript also reveals one of two external factors that severely disrupted the programme. The first was the transfer of the school from the DEC to the DET[36]. The bureaucratic load on the staff increased and there was immense concern over the new syllabi and the standards expected in the DET exams. These factors preoccupied teachers

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36 For the background to the transfer see Chapter Four. To adequately describe the transfer process requires a separate section. Suffice to say that there had been no planning on the part of the DET for the takeover, so no budgets had been allocated for the new schools, no additional posts were available, and no textbooks, work programmes or syllabi were distributed. Shortly before April, the DEC offered to transfer anyone out of the new DET schools into the DEC, thus reducing the number of posts at the schools. Days before the transfer, some schools had capital goods removed by the DEC. These were not replaced by the DET. The result was that the new DET schools were worse off under the DET than they had been under the DEC.

to the point where they were not prepared to take on any additional work, particularly voluntary work.

The other major setback which came in the middle of the turmoil surrounding the change-over was the promotion of the principal to circuit inspector and the installation of one of the older, more conservative members of staff into the position of acting principal. While he did not in any way interfere openly with the programme while the Teacher Development Fieldworker was at the school, informal reports from teachers to other members of the Medu staff revealed that he was, for example, discouraging the use of group work (Reported at Medu Staff Meeting, 20 August 1991). The loss of the principal had plunged the school into a leadership crisis which resulted in the liaison person becoming central to the running of the school. It thus became more and more difficult to organise workshops and Medu's role became increasingly service-oriented, for example providing copies of examination papers and syllabi.

The organisational aspect of the programme had been difficult from the outset. This was primarily due to the lack of telephones and the inaccessibility of the school. In order to set up a meeting, the school had to be visited and a date and time set. A few days before the scheduled meeting the school would be visited again to confirm the arrangement. Despite this, on three occasions the meeting was cancelled due to unforseen circumstances when the Medu fieldworker arrived at the school. On one occasion Medu was being evaluated by their funders and they requested permission to sit in on a workshop. After discussions with the liaison person and a number of teachers, the workshop was set up for the Wednesday of the week of the funder's visit. On the Monday the school was visited in order to confirm the arrangement and one of the teachers who had a telephone was contacted on the Tuesday evening. When the Medu staff and funders arrived at the school on the Wednesday, the school was completely deserted. On the journey back to Pietermaritzburg the Medu workers met one of the teachers from the school hitchhiking into town. It transpired that the DET was holding a regional sports day in Pietermaritzburg and all teachers and pupils were expected to attend. The teacher insisted that the staff had only been informed of the event that morning (Report to Staff, August 1991).

Other disruptions also occurred throughout the year. Besides the ongoing political disruptions mentioned in the introduction to this chapter, pupils at the school went on a boycott for part of the third quarter, demanding the reinstatement of the former principal and the formation of an SRC. During this time the teachers requested Medu not to hold workshops or visit the school. This was eventually resolved when the former principal agreed to continue teaching his standard ten classes until the end of the year. For Medu however, the nett effect of the disruptions was to stall the programme. This had a demoralising effect on the Medu staff.

A broader evaluation involving most of the teachers who had attended the first workshop was eventually held in September 1991, and this completed the first cycle of the programme. Very similar points were made to those in the preliminary evaluation, but teachers indicated that they had not had the time to experiment properly because of the difficulties outlined above. The programme had effectively run only one full cycle by the time the end-of-year examination period started looming. The initial workshop had taken place in March, the second workshop had been in mid-April and the first preliminary evaluation in June 1991. The initial design of the programme had planned for a minimum of three cycles for the year. Certainly that had not been achieved.

An internal evaluation of the programme by the unit found that the programme had fallen far short of meeting any of the aims the unit had set for it. However, at the school's evaluation, not one member of the school staff felt that the programme had been a failure, and staff unanimously decided that they would like the programme to be continued. The liaison person, when interviewed privately regarding his feelings about the programme, also supported its continuation:

> I'm sure the people did find it useful. Except that we had just been taken over by the DET and we were actually trying to adapt to the circumstances we found ourselves in. So it was difficult to apply in so much extent that it becomes meaningful. But, I'm sure now that we are used to the DET standards it will be possible to apply the programme next year...(We will be) in a position to apply those principles we actually learnt from the programme, more especially the group discussion (Pers.comm., School A liaison person, 9/9/91).

At the end of the first year the Teacher Development Fieldworker and the Medu staff conducted a final evaluation of the teacher development programme for 1991. Despite the difficulties faced during the course of the year it was felt that the programme had nevertheless been valuable. Medu's own understanding of the difficulties faced by teachers in DET schools had been deepened by the process of spending extended periods in the school. Furthermore, while the teachers had initially approached the programme with caution, the Medu staff had during the course of the year gained the confidence of teachers, and the unit had started receiving complaints from the teachers that the visits were not regular enough.

A number of issues and proposals emerged from the evaluation. Firstly, it was felt that one year was not long enough to make an informed decision regarding the potential of the programme. There had been a number of gains for the unit as a whole and limited gains for the specific programme, but it was difficult to assess whether the project was worth the time, money and energy that had gone into it.

Secondly, being a pilot study it lacked a comparative element, making generalisations difficult. It was impossible to speculate whether the problems that had been encountered were specific to the school or might occur in other schools as well.

Finally, one of the structural problems identified was the whole school approach. This approach appeared to have been misguided. There appeared to be a contradiction between the expectation that teachers needed to be committed to the change and the desire to involve the whole school in the cycle. It was proposed that the programme involve only volunteers and that this be explicit from the outset.

The evaluation concluded that it would be premature to decide to terminate the programme after only one year, particularly since there had been a number of disruptions that could not have been foreseen. Although difficult to evaluate, it was felt that Medu's presence in a school had benefited other programmes as well and that it was necessary to build on these gains as far as possible (Notes from Staff Evaluation, October 1991).

The Medu funding proposal for 1992 states: "Although results were mixed (a written evaluation of the project is available[37]), Medu has decided to expand the programme in 1992" (Medu, 1991b: 6). Medu reiterated its commitment to the principles informing the programme:

> All activities will be informed by a critical pedagogy and will be aimed at the establishment of peoples education (sic) in practice. We will also more systematically introduce a "developmental" aspect to our work so that it is firmly located within the material realities of South Africa, and so that projects are driven to self-sustainability (1991b: 6).

Year Two: The Programme Expands

Conceptually the programme was to remain the same as that described in Chapter Nine, with one significant modification. The whole school approach would be abandoned and a smaller group of volunteers would be sought. It was hoped that this would eliminate those teachers who were not committed to change and create a safer environment in which teachers would feel free to participate.

Given the fact that the fieldworker of the programme was a part-time employee it was felt that the expansion of the programme should not be too rapid. Initially a total of five schools was envisaged, but other work commitments on the part of the field-worker resulted in his time being reduced from thirty hours per week to fifteen hours per week. However, Medu benefited from the part-time voluntary work of a German trainee teacher who was spending a year in Pietermaritzburg as part of a support programme organised by Christian aid agencies in Germany. From May 1992 to September 1992 Sabine Meyer was involved in the planning and implementation of the programme, and contributed to the final evaluation and proposals for 1993. Nevertheless, without a full-time fieldworker to run the programme, a scaling down from five to three schools was seen as necessary.

37 See Wedekind, 1991 for a report on the first year of the programme.

A further complicating factor was that the Medu Co-ordinator spent six months overseas on study leave from October 1991 to April 1992. During this period the Teacher Development Fieldworker took on additional responsibilities as acting coordinator. Numerous staffing problems in the first four months of 1992 resulted in increasing responsibilities for overall coordination of the unit and consequently reduced the hours available for running the school-based programme. A combination of limited time and the difficulties schools were facing in dealing with the new enrolments resulted in a slow start to the programme in 1992.

To ensure continuity, School A was offered a place on the programme. At the end of 1991 the School A staff had indicated that they wanted the programme to continue in 1992 and this was confirmed at a meeting with the staff in early February. The other two schools were selected primarily on the basis of prior involvement in other Medu programmes. The school-based programme was discussed with a number of schools and eventually School B and School C were selected to participate in the programme.

The initial implementation of the programme was again severely constrained by what had become a perennial enrolment crisis. While the schools opened in early January, enrolments and timetabling difficulties disrupted normal schooling until well into March. During this period the principals of the three schools suggested that the workshops be postponed until there was a degree of stability in the schools. This effectively meant that the programme lost six weeks of available time[38].

School A did not require an introduction to the programme and a meeting was held with the group of interested teachers to identify priorities for the year. The teachers felt that they needed to learn how to assist students with their study and notetaking techniques.

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38 This is a significant proportion of the total time available. The first half of the year ends with the winter vacation in July. The month of June is taken up with mid-year examinations and is thus also not available. Thus there are at most eighteen weeks in the first half of the year. The second half of the year tends to be dominated by trial and final examinations. Medu's experience was that at best there were nine usable weeks in the second half of the year. Thus, given a total of only twenty-four weeks, the loss of six weeks represents a quarter of the total time available.

Despite Medu workers re-emphasising the need to focus on the teacher, the staff decided that they wanted to focus on this issue. In the view of the teachers, the problem clearly still remained primarily with the students and not with the teacher.

It had been decided not to begin the workshops until all three groups of teachers had been met. It was hoped that the types of issues would be the same as those identified previously, and the workshops could be rationalised, at least at the level of planning and potentially even running joint programmes.

Eventually, School C agreed to have a workshop in the last week of March (Minutes of Medu Staff Meeting, April 1992). This was scheduled for a Thursday afternoon when the school closed early to allow for sport. All the teachers, other than those attending to the sports, were present at the workshop. The principal had taken personal responsibility for encouraging their attendance and he participated actively in the workshop. The workshop followed a similar structure to the introductory workshop held at School A, but did not elicit much participation from the teachers present. Teachers were reluctant publicly to articulate their aims and to identify obstacles preventing them from achieving those aims. Although the principal repeatedly encouraged the teachers to "feel free" to speak their mind, only members of the senior management team participated actively.

The workshop identified teachers' own motivation as being one of the most serious obstacles to bringing about change (Fieldnotes, March 1992). Although there was broad agreement amongst the staff on this issue, it needs to be stressed that the principal was central to it being raised. The difficulty with the process was that the outcome of the workshop obliged Medu staff to follow up the particular issue that had been identified. Thus, even if the majority of teachers did not feel that motivation was their own personal priority, there was no way of ascertaining that until Medu staff were able to hold individual meetings with teachers.

The workshop raised a second dilemma for the unit. Both Schools A and C had raised very different issues for discussion. It was entirely feasible that School B would identify a third distinct area that they wished the programme to address. After the matter was

discussed by the Medu staff, it was agreed that the unit would not be in a position to offer three completely different workshop programmes at the schools. It was decided that School B should be offered a largely predetermined programme based on the discussions held at School C. The reason for this choice was that, despite the problematic nature of the workshop, the outcome gave more scope for running the programme along the conceptualised lines than the School A focus. Added to this, the liaison person at School A had identified teacher confidence and motivation as problems that the programme needed to address (Pers.comm, School A liaison person, 9/9/91).

On this basis School B was approached and the programme proposal was presented at a meeting with eight interested teachers. The cyclical nature of the programme, and the degree to which teachers could influence the process was stressed, but the initial workshop was predetermined. School B agreed to the programme, which cleared the way for implementation in each of the schools. These are discussed separately.

School A

Throughout 1992 School A suffered from management problems that had arisen when the principal was promoted in mid-1991. The deputy principal became acting principal and the DET hoped to promote him to the principalship. However, the acting principal refused to accept the promotion for personal reasons. The liaison person informed Medu workers that the acting principal had been principal at another school before joining the School A staff and had specifically asked for a demotion because he found the work of a principal too stressful (Fieldnotes, May 1992). Interaction with the acting principal confirmed that he had no intention of taking on the role of principal. He refused to be involved in any discussions regarding the programme, nor any other general Medu matters that were usually discussed with the principal. In fact, it seemed that the two acting heads of department were *de facto* in charge of the entire school. In an interview with the liaison person he expressed his frustration thus:

> I don't know why we don't become a drama school. We have an acting principal, three acting heads of department, acting teachers and the students also seem to act all the time. This place is more of a comedy show than a school (Pers.comm., School A liaison person, 26/6/92).

The chaotic state of the school's administration was worsened by a conflict between students at the school and 'outsiders', local youth who were not attending school. Later in the year an earlier conflict between teachers and students over the powers of the SRC resurfaced and pupils threatened to boycott classes. The cumulative effect of these disruptions was that the programme never progressed much beyond the setting up and cancellation of meetings and workshops (Staff meeting minutes, August 1992).

In the first six months of the year only one workshop had been held which had focused on notetaking skills (Report to Staff, June 1992). Attempts to follow this up in a systematic manner proved unsuccessful:

> A workshop to follow up the previous phase was held at School A on the 10 June. We ended up meeting with individual teachers as opposed to a group... Not many of the teachers had begun to seriously implement the programme (centred on note taking skills) and we discussed issues more generally. Exam pressure was cited as the major reason for not implementing any programme (Report to Medu Staff, July 1992).

Perhaps the most significant development of the programme at School A was the invitation by one of the teachers for Medu staff to sit in on classes. However, the purpose of this was not to observe an aspect of her practice for joint discussion. The Medu staff were invited to observe and speak to the students. Thus, although this did not form part of a systematic enquiry into the teacher's practice, it did open access to the classroom and allowed for a clearer sense of the teacher-pupil dynamics.

A newly-graduated teacher who had joined the staff at School A at the beginning of 1992 was among those most open to the programme, and engaged in extensive discussion about methods for coping with large numbers. Nevertheless, the focus throughout remained a question of resources, classroom size and pupil attitude.

By the advent of the June examination period and the July vacation, the programme had taken the form of regular visits by the Medu teacher development fieldworker and the volunteer worker with little purpose other than to maintain contact and to deliver those resource requests that Medu was able to meet. In discussion with the school's liaison

person, it was decided to suspend the workshop programme and to continue working only with six or seven of the most interested teachers on an informal one-to-one basis.

School B

The principal at School B, like School A, supported the programme but did not want to be involved. He appointed a young and enthusiastic head of department to co-ordinate the programme within the school. From the outset it was stressed that the programme should involve only volunteers. The introductory workshop was attended by twelve teachers and lasted forty-five minutes. As had been previously agreed, the overall focus of the workshop was motivation, but the approach was to suggest an action research programme as a strategy for improving morale and improving practice simultaneously. Each teacher identified an aspect of her practice which she wished to change, improve or modify. Significantly, all the teachers placed the locus of control with themselves, formulating the problem in such a way that their practice was central. For example, one of the teachers formulated the question as follows:

> What can I change about my teaching that will improve the levels of discipline in the classroom? (Fieldnotes, April 1992.)

Although the underlying assumption remained that a serious problem was the pupils' lack of discipline, the framing of the question marked a significant shift from similar problems identified at School A where the teachers formulated the problem along the following lines:

> How can we change the pupils to make them behave better?

School B's approach allowed for a greater degree of interrogation of the role of the teacher while School A focused primarily on the pupil. The reasons for this shift are difficult to identify, but perhaps it was a consequence of a more structured and closed workshop and possibly the voluntary nature of the meeting which may have allowed for a greater openness by the teachers.

After an encouraging first workshop the programme suffered from the same organisational and administrative difficulties that had hampered the development of the

programme at School A. Although School B had a telephone, this did not eliminate the difficulties of actually setting up appointments, nor did it ensure that teachers were indeed available when the liaison person had indicated that they would be. An additional complication affecting all three schools was the ongoing political tensions that at times brought the entire country to a standstill. Although the violence in Pietermaritzburg had subsided and had taken on the form of a low intensity war of attrition, frequent funerals, protest marches and other forms of 'mass action' constantly disrupted schools. On one occasion when workshops had been scheduled for Schools B and C, they had to be cancelled because both schools were holding memorial services for pupils who had died, one in a motor vehicle accident and the other due to conflict between students and local youth gangs known as 'com-tsotsis'.

Despite these difficulties, a successful follow-up workshop was organised with eight teachers attending. The report to the Medu staff for June and July describes it as,

> significant in that we were able to follow up concretely on the previous phase. We worked with a small group of eight teachers and our sense was that it was the first time that the teachers had sat down and discussed issues with each other. Coincidentally all eight teachers taught one specific class in common. This provided a useful base for exploring the possibilities of collective work. Sabine and I were invited to observe classes and we team taught with one of the English teachers (Report to Staff, July 1992).

It is necessary to elaborate on this a little more. The intention of the workshop, which had been discussed with the liaison person, was to reflect on the observations people had made about their practice and any changes that they may have implemented. This was not very successful as most of the teachers were either unwilling to speak to the group or claimed that they had not had time to implement the ideas. An added complication was that three of the eight teachers had not attended the first workshop and thus had no background knowledge of the programme.

Despite this, the liaison person described some of the difficulties that he had been experiencing with a particular class and how he had attempted to deal with the problem. This provoked much discussion about the particular class and the problems of discipline and control. All the teachers present taught the same group in all their subjects so this

specific class provided a useful focal point for the discussion and opened up a number of possibilities for collaborative work. For example, the class apparently enjoyed biology and disliked English which led to suggestions of using biology texts within the English class. Other cross-curricula activities were then discussed.

The central concern with the class was their unruly behaviour and lack of discipline. Only one teacher in the group claimed that he had no discipline problems. When this was probed by the other teachers and the Medu workers he indicated that the reason for the discipline in his class was firstly because they all enjoyed biology, and secondly because he made extensive use of corporal punishment. The teachers suggested that a solution to their problem would be for them to send unruly children to him for punishment. This posed an ethical dilemma for the Medu workers since the unit did not regard corporal punishment as an appropriate way of dealing with a discipline problem. Although the issue was raised and debated, the teachers nevertheless remained convinced that it would be the most effective strategy for dealing with the problem.

At the end of the workshop it was suggested that the Medu workers observe the class concerned to see the problem first hand. This was readily agreed to and the next lesson attended. The fieldnotes describe the course of events:

> Went to observe 10C - were immediately introduced to the class as university people - asked to speak to them about need for good study habits and discipline if they wanted to get to university (Fieldnotes, June 1992).

The original intention of observing the class to get a better understanding of the difficulties teachers faced was made impossible by the class teacher's decision to attempt to motivate the pupils by the Medu staff presence. After a brief talk to the students about the demands of university the Medu workers decided to leave as the class dynamic was entirely artificial.

Immediately after the above event, the Medu workers were approached by another teacher who had not attended the workshop and asked if they would be prepared to assist in teaching a standard six class. The lesson was an English lesson using drama to encourage the pupils to speak. The class had approximately fifty pupils in it. Interestingly, the

teacher had also asked a standard ten pupil to assist with the lesson. The script of the play was based on the biblical story of Samson and Delilah, which the pupils were busy practising. The teacher allowed the pupils to form groups which were busy discussing how they wished to play the characters that they had been allocated. The two Medu workers, the teacher and the standard ten pupil rotated amongst the groups, assisting where necessary.

The play was executed with much enthusiasm and the pupils displayed few of the inhibitions which the Medu workers were accustomed to with second language pupils of that age. The class had full control over the casting and directing of the play and the teacher intervened only when there were disputes that could not be readily resolved. Throughout, the levels of participation were high and every pupil in the class was given at least one line to speak. The pupils decided that the lead roles should be shared by three people to ensure that one or two pupils did not dominate the entire dialogue. The pupils were reluctant to leave the class at the end of the lesson and go out for their break.

In discussion after the lesson the teacher admitted that the script was not particularly appropriate but he did not know where he could find more relevant plays with the appropriate language level. It was agreed that Medu would investigate the possibility of collecting scripts for classroom drama which could be housed at the Medu Resource Centre (Fieldnotes, June 1992). The teacher felt that drama was an extremely successful means of teaching English to children who lacked the confidence to speak in public. Apparently the standard six group had performed an earlier play to the entire school with great success. On the involvement of the standard ten pupil in the lesson, the teacher explained that they were both active in the local ANC youth group and that the standard ten pupil was a youth leader. He apparently occasionally involved him in lessons because the standard six pupils respected him and enjoyed his presence. He felt that it was a way of establishing good role models for the young pupils.

Both the Medu workers felt that the lesson had been extremely innovative and that the teacher should be approached about participation in the programme. When the fact that he had not attended any of the programme's sessions thus far was raised, he claimed that the

liaison person had never invited him or any of the teachers who taught in the junior secondary section of the school. He had believed that the programme was exclusive to teachers who taught standard ten classes.

This workshop had taken place in the first week of June 1992. With examinations about to commence, the liaison person suggested that the programme be suspended until after the July vacation. Although a few informal visits took place during June, primarily to deliver requested resources, no further structured activities took place during the course of June or July.

School C

School C's programme was designed on similar lines to the programme run at School B. The focus that had been identified at the introductory workshop was teacher motivation. After discussions with the principal, the Medu workers designed a workshop which focused primarily on planning and organisational skills to assist teachers in setting realisable targets for their work. As with School B, an action research process was suggested as a possible strategy for improving morale. It was suggested that the setting of small-scale realisable aims through systematic investigation of aspects of their practice would give the teachers a sense of progress and accomplishment.

The programme at School C differed significantly from School B in respect of attendance. Although the principal assured Medu that there was no pressure to attend the programme, the majority of the staff attended. Given the restricted time (forty-five minutes) that was available for each workshop, the level of participation was limited. Although teachers did identify aspects of their practice that they wished to change, no time was available for these to be discussed with the Medu workers or as a group. Identification of concrete strategies for change, which is the first step of the action research cycle, was not addressed in the first workshop.

The Medu workers visited the school on a weekly basis and attempted to meet individually with as many of the teachers as possible. While these meetings were useful in terms of getting to know the teachers personally, it proved extremely difficult to focus on

mapping out strategies for change and ways of monitoring their effectiveness. Inevitably, the discussions would centre on the difficulties teachers faced in teaching classes of up to one hundred and thirty pupils with limited resources and Medu was constantly asked to provide material support for the teachers. Much of the work of the Medu workers focused on supplying the box library with requested materials.

The size of the classes proved to be an almost insurmountable problem. The Medu workers were asked on occasion to sit in on these large classes which gave them useful insight into the problems teachers faced teaching classes that size. However, the teachers expected Medu to provide a panacea which they were not in a position to do. The short-term solution was to reorganise the timetable. The problem lay in the classes being organised according to subject package. This resulted in the less popular science combinations having small classes of twenty, while the large general subject groups were all allocated one classroom. These groups remained together for all their subjects, so that even when the classes were doing common subjects such as English they remained split into groups of twenty and one hundred and thirty. When the issue of timetables was discussed with the principal, he ruled out any possibility of changing the system.

For the teachers working with the large groups, any change to their system of teaching was too great a risk. Certainly conventional responses to large classes such as group activities did not seem viable alternatives, largely because the classrooms were so full that any movement of students (even turning to their neighbour) would be so disruptive and time consuming that the Medu workers advised against it. Similarly, while team-teaching showed some promise, both teachers and students resisted this as a systematic approach to teaching. The short thirty minute period also placed added pressure on the teachers to get through the material as quickly as possible. Certain strategies such as leaving the classroom and using the school quadrangle were being used to a limited degree but the extreme temperatures and regular thunderstorms made this an unreliable alternative.

The inability of the programme to significantly address the difficulties of large classes made it impossible to proceed to the next stage of the action research cycle. The Medu workers continued working at the school, assisting teachers where ever possible.

However, effectively the programme had foundered on its inability to deliver concrete strategies for the teachers to implement; nor was it able to provide relief from the pressures they were facing in the classroom. When the evaluation workshop in early June 1992 had to be cancelled because of a memorial service, the principal and the Medu workers agreed to postpone any further activities until after the June examination and July vacation period.

Evaluation

The July school holiday provided an opportunity for the entire unit to evaluate its various programmes. After a systematic assessment of the aims of the programme, its successes and failures, and its strengths and weaknesses, a restructuring of the programme was proposed. The evaluation workshop identified the following points:

- There was a sense that the programme had expanded too fast while the person hours had declined.
- Although the action research methodology was useful, it was difficult to implement 'generally' and needed much more one-on-one contact.
- For the programme to run effectively, one needed a high degree of commitment from the teachers.

It was therefore proposed:

- That a full-time person work on this programme.
- That fewer teachers be involved, selected on the basis of their commitment and potential.
- That the programme become far more specific with a strong focus on the classroom, and that it be accompanied by a theoretical component (possibly accredited with the university)

(Summary of workshop, Report to staff, July 1992).

In effect this marked a major departure from the original conceptualisation of the programme. Perhaps the most significant feature of the proposals was that the control of the programme would be located with the unit rather than with the teachers, specifically in the initial stage where the unit selected teachers "on the basis of their commitment and potential." In effect this conceded that the programme had failed to accommodate both the needs of the unit as expressed in the initial aims, and the needs of the teachers in the schools.

The Medu staff agreed effectively to suspend the programme for the remainder of 1992 on the basis of the evaluation. It was agreed that no further workshops would be run, but that the Medu workers would continue visiting the individual teachers who had been active at the three schools. Furthermore, the box library system would be serviced with priority being given to the three schools. Commitments made to the teachers involved in the programme would need to be honoured.

The unit felt that the programme had provided a useful basis for planning future Inset work, and that the suspension of the programme should be regarded as a positive development based on a critical assessment of the programme. The programme would be developed using the experiences of the first two years as a basis for future planning. The unit accepted in principle the suggestions emanating from the evaluation and mandated the Teacher Development Fieldworker to draw up a comprehensive proposal for a future programme.

Consultation

After the July vacation the Medu workers met with each of the liaison persons at the schools. Individual meetings with twelve of the teachers who had been actively involved with the programme were also held to explain the refocusing. The response to the proposal was extremely favourable. Most teachers felt that a course which gave them a stronger theoretical foundation would be useful. However, all three schools indicated that they wished the workshops to continue for the rest of 1992. After a joint meeting it was agreed that Medu would run a joint programme focusing on study skills as the examination period was about to begin (Fieldnotes, August 1992; Medu Staff meeting minutes, 8 September 1992).

Despite the request from the schools for the workshop, organisational problems resulted in their cancellation. The minutes of the Medu staff meeting dated 7 September highlight these problems:

2.3.1 The dates for workshops around study skills had been confirmed with 2 schools when Volker and Sabine discovered that DET would be running a day's study skills course.
The second time no one came to the workshop.

2.3.2 Two out of the three co-ordinators are going abroad (Mr H from School B has already left).[39]
Another area of concern is that trial exams are on, then it will be the holiday and then revision for exams.

The cancellation of the study skills workshop marked the end of the programme for 1992. From that period onwards the Teacher Development Fieldworker began conceptualising the revised programme for 1993.

Plans for 1993

A significant shift in emphasis had occurred with the initial evaluation in July and this was developed during a series of workshops held during October and November 1992. A new teacher development programme was devised which sought to overcome the difficulties that the existing programme had encountered.

It was proposed that the teacher development fieldworker's post be upgraded to a full-time position. One of the difficulties that the Teacher Development Fieldworker had encountered was the unpredictable nature of the work which did not suit fixed part-time hours. Secondly, the nature of the work required extended contact time which had at times been difficult to arrange. A full-time person whose time was dedicated to the programme was seen as essential.

The size of the group of teachers that was to be targeted was scaled down again. After the first year of the programme the notion of a whole school approach was abandoned and participants were recruited on a voluntary basis. However, in order to work systematically with teachers and begin to implement the action research cycles in a meaningful way, a

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39 One of the two co-ordinators was selected by Medu to participate in an exchange programme with Danish teachers. The second co-ordinator was awarded a six month scholarship to the USA to study English second-language teaching.

high degree of commitment to the process was required by both the Medu fieldworker and the teacher. Given this need for intensive work, the unit felt that there should be a maximum of ten teachers involved in the programme.

While much of the Inset literature advocates a school-based approach, schools are not necessarily the most practical venues for workshops. The timing of workshops during school hours and the high rate of disruptions at schools militated against an effective school-based programme. For this reason the revised programme would combine school-based work with workshops at other venues. Occasional weekend and vacation workshops were also incorporated into the programme to ensure that extended and uninterrupted periods were available. Furthermore, if the programme was not based at the school the unit would not have to depend on a liaison person to organise the programme. The unit adopted a school-focused approach rather than a school-based approach as a way of overcoming the problems the school-based programme had encountered. In effect this meant that while the programme would continue to address the specific problems of each of the participants, this would not necessarily occur within the school grounds.

While the unit recognised the value of the action research cycle, it was felt that this could be successful only if the teachers were well versed with its theory. Understanding the dynamics of change and strategising the implementation of changes with minimum disruption also needed to be addressed by the programme before teachers actively began with the implementation of change strategies. It was estimated that a minimum of six months of theoretical training was required for teachers to be in a position to implement their own programmes.

A central concern of the unit was the long-term sustainability of its programmes. The school-based teacher development programme had shown few signs of sustainability during its first two years. The factors hindering the sustainability of the programme were primarily that teachers in the schools did not have the necessary confidence or skills to run a school-based programme themselves and therefore relied on an outside agent to facilitate the process. No significant development would take place until there were a number of teachers in the schools who could run the programmes themselves. The nature of the

programme as it had run suggested that these teachers were unlikely to develop these skills without a specific training programme. The revised programme thus shifted from a broad Inset programme for all teachers to a training programme for a small group of activist teachers who would eventually establish and run teacher development programmes in their own schools.

As the evaluation and planning process developed within the unit during November and December 1992, it became increasingly clear that participants would have to be involved with the project for a two or three year period to ensure that the training provided the teachers with the necessary skills. The unit would also have to ensure that it was in a position to provide support for their school-based projects. Based on informal discussions with teachers, the Medu staff felt that few teachers would be willing to commit themselves to a programme of that nature if there were no official recognition for their work. The need for an incentive to attract teachers to the programme led to discussions with the Faculty of Education about the possibility of accreditation toward a degree or further diploma.

A draft outline of a three-year course was produced by the teacher development fieldworker as a possible model for the programme (see Appendix D). The entire first year of the programme was envisaged as a theoretical grounding for the participants before beginning to examine the dynamics of schooling. The second year would focus on the skills needed to implement a programme for change in their school while the third year would see the ten participants each running their own programmes with Medu providing "intensive support." This initial draft was amended by the Medu staff at a final workshop in December, the key changes being a shortening of the programme to two years, a more explicit emphasis on people's education and a far earlier focus on practical skills for implementation (see Medu Teacher Upgrading Course: Society, Education and Change, 2nd Draft, December 1992).

Conclusion

The revised programme was presented to the Medu User's Forum in December 1992 where it was enthusiastically approved (Minutes, Medu User's Forum). The programme was approved by the Medu Management Committee and a full-time post was advertised. Advertisements and a press release calling for applicants were prepared for January 1993. The technicalities of arranging accreditation had resulted in the degree or diploma incentive not being advertised but the Medu staff were optimistic that this would be approved. A number of individuals who had been active in the school-based programme or other Medu activities were approached and a small group of potential applicants identified.

A selection committee consisting of representatives from Sadtu and members of the unit's staff was set up to screen applications. When the programme first started there had been no functioning teacher unions operating in the DEC and DET schools. By the end of 1992 Sadtu had significant support in the majority of Edendale schools and the unit felt that it was essential that the union was involved in the identification of teachers who demonstrated commitment to change in their schools (Medu Staff Meeting Minutes, December 1993).

The programme was not launched in 1993 because there were no suitable applicants for the full-time teacher development fieldworker's post. Major changes in staff and significant shifts in funding emphasis led to the programme being shelved. A massively revamped school-based course emphasising active learning with no action research component was launched in 1994 (see Wedekind, 1995). While the difficulties faced by the unit's current school-based programme bear some resemblance to the difficulties described above, the nature of the programme is too different to be accommodated within the scope of this study.

The description of the programme raises a number of practical and theoretical issues that require detailed analysis. Chapters Eleven and Twelve serve as a critical reflection on the course of the programme described above.

SECTION FOUR

CHAPTER ELEVEN

ANALYSIS OF THE METHODOLOGY PROGRAMME

Introduction

This chapter critically reflects on the programme described in Chapter Ten. The issues raised by the description are numerous and relate to the aims and planning of the programme, its implementation and to the participants, both at an institutional level as well as individually. The chapter begins by examining contextual factors in the form of institutional and organisational constraints that hindered the effective implementation of the programme. Secondly, the position of the participants as potential change agents is explored and their engagement with the programme is analysed. This is discussed in relation to the capacity of the Medu workers to 'deliver'. This leads on to a discussion of the aims of the programme and some of the problems associated with those goals as they were conceptualised by the unit. Finally, the methodology employed is examined and its appropriateness is discussed.

Contextual Factors

It would be problematic to critique the programme and its methodology without beginning by taking the material conditions in which this programme operated into account. Numerous difficulties during the course of the programme impacted on its efficacy. The physical location of the schools (described in Chapter Four) and the fact that two schools had no telephones made basic organisation extremely difficult. Added to this were the complications generated by the transfer of the schools from the KwaZulu DEC to the DET which wreaked organisational havoc in the schools and impacted on the organisation of the programme itself. However, primary amongst the contextual constraints must be the political situation in and around Pietermaritzburg in the early 1990s. Despite the information to which the unit had access regarding political developments in the townships, it proved impossible to put adequate contingency plans in place. The highly politicised nature of the communities in which the three schools were located meant that any political

disturbance within those communities immediately impacted on the teachers and students in the schools.

Disruptions to the daily programmes of the schools impacted on Medu's ability to implement its plans on a number of levels. The cancellation of scheduled workshops was an obvious hinderance. However, the more undermining aspect of the disruptions was the loss of teaching time which placed enormous pressure on teachers to make up the lost time before the examination period. The stress on finishing the syllabus underpinned most of the teachers' concerns, making it difficult for the unit to introduce issues that were not as immediately pressing. A general shift in Medu's work towards meeting the immediate needs of the teachers was a necessity that did nevertheless undermine the aims of the programme as it was originally conceptualised.

The ongoing violence and general political climate in the Natal Midlands had numerous other effects. The annual enrolment crisis which exacerbated the already crowded conditions was caused in part by the migration of large numbers of people out of the Inkatha-controlled Vulindlela areas into the Edendale valley. This was coupled with repeated calls by political leaders and organisations for students to return to school. As reported in Chapter Ten, 1991 and 1992 saw extended periods of the first quarter being effectively lost as teaching time because the staff were involved in enroling students into the school. Because of the lack of co-ordination between schools, inefficient record keeping, corruption and the destruction of property it was extremely difficult for schools to verify applicants' previous school records. The result was that teachers were expected to teach classes of pupils whom they did not know and who often had not covered the material that was regarded as a prerequisite for the particular standard in which they were enroled. As with the disruptions, this need to revisit sections of the syllabus from previous standards again intensified the pressure to complete the prescribed syllabus and detracted from any attempts to discuss matters that were not immediately relevant to the teachers.

The syllabus constraint is greater in the DET than in many other education departments in that examinations and tests were externally controlled. The final matriculation examination was set at a national level while other standards were set by the regional office of the

DET. Thus, even at a standard six or seven level, teachers were constrained by examinations set by teachers outside their schools, requiring the strict adherence to a particular work programme. This type of centralised bureaucratic control militated against a decentralised model of Inset that Medu was applying in the teacher development programme.

Control

External factors such as political repression and restrictive bureaucracies also impacted on the level of teacher organisation. The KwaZulu government specifically forbade teachers in its employ to become members of Sadtu and recognised only Natu. While the DET could not forbid its teachers to join Sadtu, it did not recognise Sadtu until 1992. Throughout the period that Medu worked with schools in Edendale there were no indications of any Natu activities or support for Natu. While teachers privately expressed sympathy for the programmes of Sadtu, it was not until Sadtu was officially recognised by the DET in late 1992 that any form of organisation emerged. The lack of strong teacher organisations resulted in the Medu programme being negotiated with individuals and not having the institutional backing of a legitimate teacher organisation. There are two levels at which this is a problem: Firstly, organisationally it would have facilitated the process of negotiating and implementing the programme in the three schools had there been a level at which the teachers could have met outside of the internal, school-specific context. Secondly and perhaps more significantly, Walker suggests that the support of progressive teacher organisations is a central element to the successful implementation of an action research programme in schools (1990: 62). She argues that it is only through the medium of a progressive organisation that teacher-activists can be identified and that these are central to the attainment of progressive goals within the action research framework. This issue is discussed further in the following chapter.

The issue of who controls the programme links directly with problems of access. The initial cycle at School A had been negotiated with the principal of the school while it was under the control of the KwaZulu DEC. When the school was transferred to the DET the more centralised nature of that department impacted on the programme in so far as

principals were far more reluctant to make unilateral decisions regarding access. Indeed, all principals involved in the programme felt that they needed to get permission for the programme to continue. The consequences of this decision was a move to a more technical and resource-related motivation for the programme from the unit as it was felt that this was most likely to receive the support of the inspectorate. In spelling out the aims in this manner the Unit had to place more emphasis on the delivery of resources such as the box library and less emphasis on the initial aims of the programme.

The role of the principals in the three schools was quite distinct. In School A the principal was initially supportive of the programme and encouraged teachers to participate, albeit indirectly through the appointment of one of the younger Heads of Department as the liaison person who facilitated the meetings with the teachers. However, once the DET took over the management of the schools, it was quickly decided to appoint a new circuit inspector to deal with the new schools and the principal of School A was promoted to this post in the middle of the first year of the programme. The acting-principal was not nearly as supportive as the former principal had been and immediately there were difficulties for the programme. On one occasion teachers who were attempting to implement some of the ideas from the programme were asked by the principal not to make as much noise, and were forbidden from taking their classes out of the classrooms (Fieldnotes, May 1992). Clearly this posed major difficulties for the teachers and the unit staff as the possible range of initiatives were drastically curtailed.

In effect, the change of principalship marked the effective end of the programme at School A in terms of the methodology component of the programme. The acting-principal was very happy for the unit to continue providing resources and, although the pressure of the changeover to the DET influenced this trend, the rest of the year was spent evaluating the programme with the teachers and assisting them in coping with the changeover. While it is difficult to speculate, it is possible that a supportive principal would have enabled the programme to continue along the lines of its original conceptualisation and not simply become a service programme.

Schools B and C both had supportive principals, but with different approaches. School B's principal operated in a similar manner to the original principal at School A, that is, in a supportive yet removed fashion. He was not interested in becoming involved in the organisation or promotion of the programme although he was quite happy to allow it to take place on school premises during school hours, albeit at lunch time. Like School A, he appointed a young Head of Department as the liaison person and all arrangements were made by him. The ability of the liaison person to fundamentally alter the nature of the programme was illustrated by the restricted invitation to teachers. As mentioned in Chapter 10 above, the unit discovered by chance that only senior teachers (i.e. those who taught Std 9 and 10 classes) were invited to the workshops and discussions (Pers.comm., Std 6 English teacher, 18/10/92). While there were certain benefits to this situation, particularly the ability to focus on specific classes and their problems, it did exclude some of the teachers who were actively innovating in their classrooms, who were active in other Medu activities, and who were involved in teacher organisations. Thus, as at School A, the liaison person largely shaped the nature of the programme in the school.

This can also be seen in the case of School C. In this school the principal adopted a "hands on" approach to the programme. He suggested that the programme be run on Thursdays, when the school closed earlier for sport activities, and that the teachers who were not involved with sport would all be encouraged to attend. The unit staff indicated that the programme would be successful if it were entirely voluntary. The principal concurred with this view. Nevertheless, the workshops at School C were attended by all the teachers not involved with sports, including the principal and senior management team. Their presence at the workshops resulted in limited participation from the ordinary staff members and thus the priorities for the programme became defined largely by the principal and heads of department. The following workshops were less well attended and private discussions with teachers revealed that they did not feel comfortable with the principal being present at the workshops (Fieldnotes).

Because Medu did not have control over the organisational aspects of the programme and was dependant on the school's liaison person for the organisation, publicising and to some extent selection of the teachers who actually attended, it is clear that the nature of the

programme was influenced by this trend and to some extent the goals the unit had set itself for the programme were undermined. Thus the original rationale for using action research as a methodology and the transformative goals related to people's education were quickly subverted and the focus shifted onto material or efficiency concerns.

Teacher Commitment

While this shift in focus can be understood in terms of the material and contextual factors, this would not (for example) explain the reluctance of teachers to sacrifice any of their time after school hours. Without detracting from the enormous workload and the conditions under which the teachers involved in the programme had to operate, it is necessary to interrogate the unit's belief that the teachers at these schools would be interested in the type of change Medu envisaged. The limited attendance (including the occasional reports of active undermining of the programme), the reluctance to meet regularly, the refusal to allow the programme any time after official school hours, and the constant emphasis on the material benefits that teachers could get from the programme seems to indicate that the "culture of teaching" was not suited to the programme's objectives. Given the discussion in Chapter Two on the class position of teachers, it is clear that it would be naive to assume that the teachers would automatically be interested in the type of transformation that the Unit had envisaged. Organised teacher action has invariably been prompted primarily by material interests, and it is not unlikely that individual involvement will often be based on the same set of interests. Thus, while teachers probably identify the need to change, their desire to change will be limited since change invariably involves stress. This failure to understand properly the complexities of change seems to be one of the key weaknesses of the planning process. Parker puts it succinctly in his critique of a similar programme run in the Western Cape:

> There is no discussion of what constitutes "change". Does it involve a change in teacher consciousness and/or behaviour? How is change manifested in a school - in different teaching methods, in materials development, in relationships, or in all three? To discuss change without clarifying what one means by words like 'control', and 'active agents' is to provide a conception which does not come to grips with the everyday reality of classrooms in the townships and in the rural areas. In the context of South Africa it is particularly important to be able to distinguish between change as

reform and change as a more radical and progressive transformation (Parker, 1988/89: 100).

What makes the change so difficult for teachers in South Africa is that the type of ideas underpinning a programme such as the one discussed here is based on a philosophy that is fundamentally different from the paradigm, such as Fundamental Pedagogics, within which most of the teachers have experienced both teaching and learning. Thus, change in this context is not simply a modification or improvement, it necessitates a paradigm shift which requires an abandonment of everything that has gone before. The consequences of this can be extremely unsettling for the participants and the predictable reaction will be either to resist or ignore the programme, or to transform it in such a manner as to make it less threatening. Both of these reactions were observed amongst the teachers who came into contact with the programme.

Medu realised that the aims of the programme might meet with some resistance and therefore made them more palatable by emphasising the possible material benefits that participation in the programme could deliver. This then became problematic in that the expectations of the participants were primarily focused on the unit's capacity to deliver tangible aids to their teaching. In order to ensure the continuation of the programme, much additional work was put into meeting these expectations through such initiatives as the box libraries, subject workshops and general consulting. It is not within the scope of this study to evaluate the other work that the unit was doing. The point is rather to suggest that the need to meet teachers' expectations ultimately resulted in a diversion of energy away from achieving the original aims of the programme and towards conventional in-service activities.

The tension between having a populist approach which attempted to include as many of the teachers as possible, and a selective approach which involved only those with some commitment to change is most clearly identified with the fluctuation between a whole-school approach (as attempted in School A in the first year of the cycle) and the increasing move toward a selective approach, first asking for volunteers and finally moving toward a selection procedure in the proposals for an intensive training course. As the unit became aware of the weaknesses of the whole-school approach, it progressively tried to restrict

access to those most committed to the original goals of the programme. The difficulty, however, lay in the fact that the teachers that were already part of the programme could not be excluded, and their expectations had to be met. Thus one of the aspects of the programme which was originally identified as a strength, i.e. the school-based nature of the programme, became a weakness. Had the unit run the programme at a venue under its control, it could also have determined the nature of the participants and selected those most likely to benefit from the action research approach. However, because the timing, venue, and selection of teachers remained out of the unit's control, the programme ultimately had to change focus substantially.

Differing Visions

This was further complicated by the tension created by the unit holding a principled belief in democracy within the programme, while still having a clear set of aims itself. Thus, while wanting to achieve certain progressive aims, the unit nevertheless wished to include the teachers in planning the programme. The unit assumed that its aims and objectives would correspond with those of the teachers, but this proved to be an incorrect assessment since the teachers tended to resist ideas which would require any substantive changes in their teaching practice. The participatory and democratic principle thus resulted in teachers substantially changing the focus of the programme and placing the unit in the position of a traditional service organisation.

One of the factors that made it difficult for the unit staff to assert their vision of the aims of the programme was related to the complexity surrounding the issue of race and its associated power relations. The unit staff were acutely conscious of the problematic history of intervention programmes run by university-based 'white' South Africans which attempted to "show" 'African' teachers how to solve their problems (see the Preface). In order to avoid a situation where "white experts from the University" help or show teachers what they should do, the programme was designed for as much participation by teachers in the planning and organising as possible. The consequence was that the unit was reluctant to be seen to be imposing its own agenda on the teachers and therefore tended to avoid making its own aims for the programme explicit. Two possible consequences could emerge

from this approach: Firstly, the teachers could be unaware of the unit's aims but be persuaded by the unit staff to run the programme according to their wishes. This is problematic in that there exists a pretence that the teachers are centrally involved in the planning when in fact the plans were designed beforehand by the unit staff. This covert coercion to bring the teachers to a predetermined consensus makes a mockery of the democratic principle. The second possibility is that the teachers do genuinely influence the planning and implementation of the programme, and in so doing change or negate the original objectives of the programme. The consequence of this would be that the unit staff would finally implement a programme vastly different from their intended programme, and it is likely that their own commitment to that work would have been undermined.

The latter scenario seems to represent the progress of the programme. The response to this by the Medu staff was to revisit their initial plans and to move progressively further away from the notion of the teachers being central to the planning process. The first step was to abandon the whole school-approach and attempt to recruit volunteers. At the end of the second year however, the school-based nature of the programme was also abandoned and the Medu Proposals suggested an intensive two-year, training course based at a neutral venue which would equip a small group of teachers to begin small action research projects in their schools. Thus, while the programme would remain school focused and in that way continue to address specific problems they might be facing, the design of the programme, its aims and objectives, and the implementation would be controlled by the unit.

Action Research

At the end of the second year of the programme the structure and design had been dramatically altered. The only constant feature that remained was the belief that action research was a powerful method to introduce change and innovation in schools. It is necessary to examine this belief in action research and its appropriateness for the South African context.

The reason action research is so popular amongst progressive educationists is that it challenges the traditional divide between the researcher and the researched and the teacher

and the learner, the former being active (and powerful) and the latter passive (and powerless). In the action research cycle the researched is in control of the research, because she is the researcher. This is based to some extent on the Freirean notion that the teacher must also be a learner, thus breaking down the power relations that exist between the parties involved in the learning process (Freire, 1978). This is discussed in detail in the next chapter.

The practical difficulties with attempting to use action research in the South African context have much to do with the unproblematic way the methodology was transplanted from the first world context of Britain and Australia into the peculiar South African educational dispensation with all its material and ideological complexities. Melanie Walker, in a recent reflection on her own involvement in an action research programme in the Western Cape, identifies one of the key difficulties she and her colleagues faced as a failure to recognise the distinctly different contexts from which the action research programmes emerged:

> ...far from being imposed on teachers by academic researchers, action research developed organically from an existing teacher culture receptive to notions of innovations, of reflective practice, and curriculum theorising. Indeed,... it presupposed such a culture (Walker, 1993: 98).

Clearly, given the discussions on the position of teachers in South Africa and the experiences of the Medu staff in implementing the programme, there is little evidence that such a culture existed. Teachers in the United Kingdom and Australia view themselves as professionals with a long tradition of understanding curriculum development as a process (Elliot, 1991) which, Walker suggests, underpins the shifts from "educational research on teaching to action research *by* teachers" (1993a: 98). Action research initiatives thus arose out of a desire by teachers to participate actively in curriculum decision making processes. In contrast, the Medu programme was conceptualised by a group of university-based educationists influenced by the literature generated by the action research movement in the first world, and then imposed (albeit in as open and democratic a manner as possible) on the teachers. The teachers' own priorities, as they were identified during the initial workshops, did not reveal a desire for becoming participants in a curriculum development process. On the contrary, the teachers were concerned with issues of resources, discipline, and general working conditions. When the Medu staff attempted to continue the programme

along action research lines, there were clear moments of resistance. Teachers wanted solutions to their problems and expected Medu to provide these solutions. In the context of the social position of teachers, the nature of the teacher training, and the material conditions that teachers were working in, this reaction is perfectly understandable. Action research is unlikely to succeed unless these contextual issues are addressed.

Conclusion

It would be erroneous to suggest that the teachers were not concerned about their practice and were not interested in change. While there was reluctance to embark on a fully fledged action research programme, teachers were acutely aware of the need to change their teaching style. Regular references to the "new methods" and "those methods used in white schools" punctuated discussions with the teachers (Fieldnotes, April 1992). This awareness is likely to grow as the effects of the unified education department are felt in syllabus and assessment changes and teachers become more actively involved in the development of a new curriculum. It is possible then, that the basis for a culture of teaching that could sustain an action research programme was indeed emerging. Given a more supportive education department and a gradual redistribution of resources, teachers may begin approaching universities for support in initiating action research programmes. Whether action research should be encouraged as a vehicle for bringing about change in the South African classrooms needs further analysis. It is this deeper reflection of the theoretical underpinnings of action research which is dealt with in Chapter Twelve below.

CHAPTER TWELVE

ACTION RESEARCH: A THEORETICAL CRITIQUE

Introduction

This chapter revisits the theories and assumptions underpinning action research as it was formulated by Medu (see Chapter Seven). It is argued that a number of theoretical flaws in the conceptualisation of action research could explain some the problems encountered by the programme. These flaws stem from a misreading of Jürgen Habermas' concept of an Ideal Speech Situation (ISS), as well as some tensions inherent in Habermas' theory of communicative action (1981a, 1981b) that make it difficult to use as a basis for action. These tensions, it is argued, begin to lead one to question the assumptions that underpin the action research methodology.

Habermas, Communicative Action and Action Research

The theoretical foundations of the popular model of action research, which formed the basis of the Teacher Development Programme, is based on a reading of Habermas which arguably Habermas never intended, or at least has not advocated in his more recent work (see for example Habermas, 1992). Habermas' theory of communicative action is a complex and much debated justification of a critical social theory based on enlightenment rationality (the theory reaches its most developed form in the two volumes entitled *Theorie des kommunikativen Handelns*, 1981). Habermas is attempting to rescue what he regards as the positive aspects of modernity. His justification is grounded in the structure of language. For Habermas, language provides an analogy and an argument for a universal method. Central to this is the argument that every speech act assumes the potential of undistorted communication within a discourse community. Without entering into the complexity of his argument, Habermas is suggesting that it is possible to imagine a community where all participants are autonomous, have the same rights, responsibilities and are able to talk freely without distortions. This community Habermas calls emancipated (1972: 312).

It is this notion that the action research theorists have appropriated and have inserted into their theoretical argument suggesting that action research is emancipatory. As will be argued below, this clearly is a misreading which does violence to the complexity of Habermas' argument. Robert Young (1990) has suggested that this misreading of Habermas is a result of the fact that much of Habermas' work, particularly that related to education, has not been translated from the German and has thus not impacted on the English-speaking academic community. Furthermore, critical theory and its applications have been widely discussed in the German academic community. Young warns that,

> the weakness of the practical accomplishments of critical theory have left it, at least in Germany, in such a state of disarray that its critics are already announcing its demise. With the characteristic irony of history, it is precisely at this time that the critical theory of education is attracting increased attention in the English-speaking world. What must be avoided is the tendency, already evident in some of this newer work, to repeat the idealist errors of earlier German thought (p.68).

The Ideal Speech Situation

It is this idealist reading of Habermas which underlies much of the action research literature which informed the Medu programme. At issue is the ISS. Much of the writing about action research refers to the "democratisation of research", the "elimination of the power relations between researcher and researched", and so forth (see Carr & Kemmis, 1986; Davidoff *et al*, 1993; Davidoff & van den Berg, 1990; Luckett, 1993; Walker, 1988; Walters, 1989). When examining the texts that influenced the programme (see Chapter Seven), action research is said to have "the potential to re-insert teacher agency into the struggle within education which aims to transform self and social relations ... rather than simply reproducing them" (Walker, 1988: 150) while others go so far as to argue that action Research is the "only morally defensible kind of research that critical academics can undertake" (Luckett, 1993). What this belief in the emancipatory potential of action research stems from is a misrepresentation of the ISS as something concretely achievable.

Habermas is quite categorical in his rejection of this utopian form of thinking, stressing the historical situatedness of any social interaction (1981a: 111-112). The role Habermas advocates for the ISS is a regulative ideal, an analytical tool with which to identify asymmetry in power relations by comparing them to an imagined situation. Such a

regulative ideal sees the model society as power free, but makes no claims that this ideal is realisable.

Thus, achieving the establishment of an ISS in practice is not possible. The power relations that impede any communicative action cannot merely be wished away. The ISS is a tool for imagining the conditions necessary for 'symmetrical' communication, and therefore mutual understanding and genuine consent, to take place. The ISS, if used in this way, foregrounds the factors impeding symmetrical communication but does not reduce or eliminate them. Habermas himself argues that "the ideal of discourse does not provide a process to create norms but only a process to examine them" (cited in Young, 1990: 69). However, once they have been highlighted, it may be possible to begin reducing the asymmetry, but this is not necessarily so. This crucial issue is discussed further below.

It would seem then, that to read Habermas as arguing for an ISS in action research, or to put it another way, to see the relationship between participants in an action research cycle as the practical instantiation of an ISS is misleading. As Rex Gibson points out,

> Most of action research's weaknesses spring from the facile acceptance of Habermas' ideal speech situation... Fundamentally disabling is the failure to realise that action research only resembles in its surface features the ISS (1986: 164).

The action research cycle often denies the existence of factors which may impede and retard the process towards genuine communication leading to critical consciousness. Stephen Appel argues that,

> radical pedagogical systems like Action Research deny that human practices are ideological and that ideology is a depth psychological matter. Despite the best intentions of all concerned, however, there are all sorts of defence mechanisms and internal and interpersonal conflicts which can result in discussions skating on the surface of what are deeper disturbing motives (1991: 104).

Thus, even if teachers are genuinely committed to a transformation they still have to overcome a range of repressed thoughts which will impact on their capacity to change.

The interference of the unconscious will always severely limit the ability for genuine communication unless this is centrally addressed in the cycle.

Psychoanalysis and Communicative Action

Habermas has argued that the psychoanalytic method is analogous to critical theory (1972; 1974: 22-29). This methodological link to psychoanalysis is acknowledged by Carr and Kemmis and used by them to develop their model of action research (1986: 138, 147, 159, 193). However, it is clear from their model that the full implication of drawing on the psychoanalytic influence in Habermas is not developed. Psychoanalysis is premised on a belief that people's actions and their communications are distorted by the repressed unconscious and through the medium of an analyst the repressed unconscious can be exposed and dealt with, thus alleviating the neurosis this caused. For Habermas this constitutes personal emancipation from the repressed. This is paralleled in the social world by the ability of critical theory to alleviate the distortions and deformations in society via critique. If psychoanalysis parallels critical theory which in turn underpins action research, then two important consequences emerge. Firstly, advocates of critical theory and action research need to understand the complexity of the unconscious and the difficulty of changing deeply embedded thoughts and memories. Analysis is a difficult and time consuming process requiring a great deal of will power and desire to really get to grips with the underlying causes of neurosis. The implication must be that any change in an action research context will be equally time consuming and require the same degree of commitment. Thus, if action research is to result in transformation it can only be viewed as a long-term project with no guarantees of success. Those espousing critical theory and action research as vehicles for emancipation will need to temper their optimism.

The second issue raised by the psychoanalytic parallel is the central role of the analyst. Psychoanalytic theorists argue that it is very rare, if not impossible, to analyse oneself. The repressed thoughts will constantly interfere and distort the attempt at analysis, in order to protect one from one's inner most desires. If the neurosis is to be cured then a trained analyst will need to act as interpreter. This poses a problem for action research's emphasis on the researcher (the analyst) also being the researched (the patient). Like an analyst, a third party, particularly a trained person, may be able to pick up interesting or problematic

aspects of the practice which the practitioner, for one reason or another has not noticed and will therefore not address.

Power relations in the speech community

Depth psychological factors are not the only impediment to the realisation of an ISS. Differential power relations between members of the action research group related to race, gender, status and age all 'distort' the communication taking place. The power relations that exist between a young, 'white', male, English-speaking, university-based fieldworker and a middle-aged, 'African', female, college-trained, Zulu-speaking teacher cannot simply be overcome by a commitment to equality on either's part. Pretending that this is possible does not eliminate these differentials, it merely hides them behind a facade of 'democracy' and 'collective responsibility'. On the contrary, these relations constantly distort the communication taking place amongst the various participants, without that distortion ever being acknowledged. They can only be addressed if the ISS is seen as an analytic tool with which the conditions which maximise free communication in an action research context are identified, thus allowing other possibilities to be imagined.

The difficulty that emerges from this use of the ISS is that it requires that the participants identify the factors that may impede communication before any reflection begins. It is only possible to begin reducing the power differentials if they are foregrounded. However, the conversation about these constraints is itself not free from the very power relations that the conversation is attempting to address because that conversation will always be embedded in particular times, places and contexts. The ISS can therefore not be a measure of actual speech situations, a scale one can use to determine the degree of symmetry or asymmetry, because that can only be assessed by imagining the specific participants in rational discourse in a specific historical context. The context plays a crucial role in determining the degree of asymmetry because the context influences the power relations.[40]

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40 There may in fact be situations where asymmetrical speech roles are appropriate. Young refers to the conversation between a doctor and a patient as one such example (1990: 76). The doctor has specialist knowledge which the patient could not acquire simply. However, the patient's interests are often favourably served by this inequality. Perhaps this could be taken further to argue that within a complex society with high degrees of specialisation it is inevitable that asymmetrical speech roles will exist but it is possible for

Further, the ideal speech situation can only be an ideal, and never a reality, precisely because people are not only repressed by the different power contexts and social worlds, they are also constituted by them (Foucault, 1977: 194). A conversation about the constraints on communication strikes to the very core of a person's being, their identity. A conversation about this at the beginning of an action research process then becomes unimaginable. Rather it is likely that the researcher lays certain concerns on the table for discussion. Why should a teacher at one of the schools discussed in Chapter Four above enter into a conversation of this nature? A process that throws into question the life-world, in the Habermasian sense, of teachers is likely to cause "an unspecified and free-floating fear to permeate even the most innocent aspects of daily life" (Young, 1990: 70). This can hardly be a productive starting point for an emancipatory project.

Action Research and Educational Change

The claimed emancipatory power of action research thus faces critical challenges. One of the first components of action research that is questionable is the degree to which action research empowers the participants. The claim that action research encourages professional autonomy amongst its teacher-participants, an aspect that makes it so appealing to 'left' academics and teachers, becomes suspect on two counts. Firstly, because the action research process is not an ISS, there remain, often in more hidden forms, serious power differentials between the various participants in the cycle. Thus, while university-based participants might wish to believe that they are participating as equals in a process of reflection, an analysis using the ISS as an analytic tool would reveal that in fact this is very far from the truth. The experiences of the Medu programme, as well as similar programmes conducted in the Western Cape, would bear this out (see Flanagan, 1991b; Walker, 1993).

The second aspect relates to the closed nature of the action research process. By centring the research process around the action researcher or the research group, where participants

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these to be mutually beneficial and not manifest oppression. If this argument is plausible then the asymmetry between researcher and researched could be constructed in a non-oppressive fashion.

determine the problems, the methods, and the language, the process becomes centrally concerned with teachers' interests. Statements such as the following abound in texts on action research: [Action research] shifts some of the power... back where it belongs , with you, the teacher (Davidoff and Van den Berg, 1990: 51). However, teachers are not the only parties with an interest in schooling and it is not self-evident that power should primarily be located with the teacher.

> The insistence on 'no outsiders' smacks of a desire for monopoly control which fits ill with any view of democracy (or critical theory). What goes on in schools and classrooms, what those schools and classrooms should be like, is not a matter for 'insiders' only (Gibson, 1986: 164).

Gibson goes on to argue that an uncomfortable but necessary outcome of the critical theory that action researchers claim as their theoretical basis is in fact an erosion of professional autonomy of teachers because its commitment to emancipation and democracy would deny locating too much power with one interest group (1985; 1986: 165).

Clearly in South Africa this argument needs to be located in a system where currently teachers have little autonomy and it may well be true that an action research programme gives teachers a sense of the possibilities of more autonomy in curriculum planning and implementation. However, the focus on the participants, embedded in the methodology of action research, does make any outside intervention more difficult to justify. Thus the Medu programme specifically stressed the need for the school groups to become self sufficient and operate without the teacher development worker. Indeed the continuing dependence on Medu became identified as a weakness. This desire to localise the action research cycle makes it potentially "cliquish", with the participants determining what will and what will not be investigated. The closed nature of the research group could potentially lead to the action research cycle becoming a closed circle which entraps and does not liberate. This is a point made by Habermas himself in his critique of Popper's positivism, arguing that a scientific community requires cultural and social self-criticism "if it was not to remain trapped in the circle of its own culturally-conditioned level of theoretical perception" (Young, 1990: 73). The smaller the community, the more likely that it will become trapped in a particular perception.

Related to this, it remains unclear why participants in an action research programme which focuses on classroom practice should make the shift from their own specific situation to a critical reflection on schooling and society more generally. Unless this is explicitly placed on the agenda of the reflection, it seems unlikely, given the immersion of the participants in the specific context, that this link will automatically be made as a result of the action research cycle. Rather, it again reinforces the necessity for the group to be less exclusive, including people who do not have as much invested in the particular action and are able to introduce issues of generality into the research process. Introducing the 'outsider' would however undermine the degree to which the teacher controls and defines the research situation because it would bring into question the way this definition has come about.

Postmodern Critique

Much of the above discussion seriously questions the assumptions that underpin action research (as well as much critical theory). Roger Deacon and Ben Parker argue that these assumptions include the following:

> ... [I]t is assumed that humans are rational, reflective and creative beings; that history is progressive; that reality consists of essences often hidden beneath appearances; that it is possible to penetrate these appearances and grasp the truth; and that freedom through self-awareness and the control over one's own activities is both possible and desirable (1991: 107).

Devastating critiques of these assumptions, which have largely been inherited from the Enlightenment, have been made by the post-structural and post-modern theorists (see Lyotard, 1984; for an exploration of the implications for teachers see Ellsworth, 1989). A major philosophical struggle has ensued between those who reject all normative foundations, and those, like Habermas who insist that a basis is necessary and exists in the universally taken for granted features of language and communication. By maintaining a normative point, Habermas wishes to rescue the unfinished project of the enlightenment.

It is beyond the scope of the present study to enter into this debate in any depth other than to point out that an extreme postmodern critique leaves virtually no room for action. The uncritical celebration of difference advocated by Lyotard provides no basis for any critique.

For example, appealing to a concept such as a 'basic human right' in order to critique repressive cultural practices becomes impossible because all universals and totalizing theories have to be rejected (Rorty, 1984). In an educational context there is no basis for advocating one methodology over another. However, the warnings of the postmodernists need to be heeded: rationalism has a repressive heritage and the desire for consensus integral to Habermas' critical theory can potentially legitimate the suppression of difference.

Reinserting the Dialectic

Ernesto Laclau (1993) argues that pure particularism is self defeating on grounds other than that one must logically accept all manifestations of it. He argues that the universal and the particular exist in an unresolvable tension that constitutes both. The particular can only exist in opposition to other particularities within a context, and each particularity will define itself in relation to the others, thus moving to the universal. The subject becomes dependent on other subjects for its very identity. Laclau argues that this can be negotiated but not actually superseded:

> We can play with both sides of the ambiguity and produce political results by preventing any of them prevailing in an exclusive way, but the ambiguity as such cannot be properly resolved (p.10 emphasis in the original).

While Laclau is applying this theory to political action, it may be possible that this could apply to action within the classroom and action within the research process. Instead of basing emancipation on a universal consensus, we rather locate it in the unresolvable tension between the various actors. How could this work in practice? Johan Muller has suggested that emancipation can at best be a by-product of the research process (1993a: 19). Certainly action research would need to jettison any universal claims about its potential to lead to emancipation. A return to Theodore Adorno's negative dialectic, premised on an understanding that all thoughts and consciousness are utterly intertwined in social processes, means that, at best one can use the dialectic to imagine other possibilities rather than trying to transcend these thoughts (Adorno, 1966; Jameson, 1990). Our inability to define emancipation, as well as the way in which power relations shape and

constitute the relationship between participants makes any attempt at transcending this impossible. Further, because the context determines the participant's identity in relation to each other, emancipation based on a true consensus becomes inconceivable. Nevertheless, negotiation of the differences is possible without aiming to negate them and the basic structure of the action research cycle provides an adequate vehicle for this negotiation.

A critical point then becomes the opening up of the process. Using the ISS as an analytic tool, as well as "post-modernism's genealogical anthropology, properly used, can assist in the analysis of [asymmetrical relations]" (Young, 1990: 77) which then need to be negotiated. The action research leader's role thus needs to be centred, and not obscured by the rhetoric of democracy. The participants' varying desires need to become a part of the negotiation of the process. The aim of the research group leader is crucially to interpret, challenge and gently remind group members about the purposes of the project, and drawing linkages between the concerns alluded to by other members of the group who may be interested in purely technical matters related to methodology. Only if the differences in needs, expectations and desires that will manifest within the group are acknowledged is it possible for the participants to satisfy some of those aims. The achievement and accommodation of differing desires then becomes empowering for the participants, not because they conform to a universal concept of emancipation, but rather because empowerment becomes the realisation that people do have an element of control over their lives.

Conclusion

Exploring the theoretical assumptions underpinning action research leads one to conclude that action research is not inherently emancipatory or empowering. However, it is possible for empowerment to occur during an action research process. It is possible that the unit's programme failed because it was attempting an impossible task. It is, ironically, entirely possible that the process of evaluating the programme may have led to an empowering of the unit staff. "The challenge is how to deal dialectically and relationally with systemic issues from the perspective of participatory methodology" (Muller, 1993a: 20). Action research which is reconceptualised in a way that avoids obscuring power relations behind

democratic rhetoric and which has been purged of a desire by the initiators to lead people to emancipation could be a worthwhile enterprise within the broader reconstruction of South African education.

CONCLUDING COMMENTS

Conclusions tend to imply closure. It is hoped that this study opens rather than closes debate. Thus there is no single conclusion to this dissertation. Each chapter concludes an aspect of the dissertation. The purpose of these comments then, is to identify the analytic strands that have been developed throughout the dissertation.

The first section (Chapters One, Two, Three and Four) sets a context. Debates about historical and sociological interpretations of the education system in South Africa are explored, the social location of teachers is analysed, the material conditions in which pupils and teachers work in South Africa and KwaZulu-Natal generally, and specifically in the schools under discussion in this study, are described. This context has major implications for any interventions aimed at teacher development and change. Much teacher development literature, and indeed many of the organisations running teacher development programmes, assume that there is indeed a desire on the part of teachers to change. This dissertation has argued that this is a false, and potentially dangerous, assumption. Change requires either a commitment by the teachers, or coercive force. The context described in Section One is one which did not encourage either - teachers trained in a paradigm that simultaneously encouraged authoritarian teacher centred pedagogy and a very hierarchical organisation which dictated all aspects of the curriculum; a trend amongst teachers to enter the profession as a means of social class mobility; the well documented financial impoverishment of schools; a high level of violence affecting pupils and teachers. These contextual issues result in a high level of demotivation amongst the teachers that were the target of the Medu programme.

Section Two outlines the background to in-service education and training of teachers in South Africa, its history and policy. The specific work of the Midlands Education Development Unit is described and the theoretical background to the choice of action research as a preferred methodology outlined.

Section Three details the background, planning and implementation of the School-Based Teacher Development Programme. Both Sections Two and Three are largely descriptive.

They detail a theoretically informed and practicable attempt at running a teacher development programme. However, the programme described does not take into account the issues raised in the analysis of the context, which is highlighted by the practical problems encountered during the implementation.

Section Four attempts to understand and explain the events described in the previous sections, both at the level of programme implementation, and at the level of the theory underpinning the programme. Each is subjected to critical enquiry and a number of possible conclusions arrived at. There were material and contextual difficulties, there were difficulties associated with the commitment of the participants. There were difficulties related to the relationship between the Medu staff and the teachers in the schools. Underpinning all of these, it has been suggested that the theoretical framework on which the whole programme was premised is flawed.

There were also a range of positive aspects to the programme. The teachers and the Medu staff involved all individually learned from the experiences. The experiences contributed to revised plans which have formed the basis for other programmes. The contact between teachers and the unit (and indeed the university) was strengthened and relationships have developed which continue to play a crucial role in the ongoing work in schools.

Admittedly, the analysis presented here is only one explanation of what occurred. There has been an honest attempt to provide as much detail and to deepen the description by relying on a range of sources, but ultimately the data and description could be represented in a number of different ways. What is clear though, is that Inset work will play an increasingly important role in the restructuring of the South African education system. Hopefully this study is able to contribute to our understanding of Inset and the difficulties that are likely to confront the state and non-governmental organisations as they attempt to reconstruct the South African education system.

APPENDIX A

MEETINGS AND INTERVIEWS

During the course of the planning and implementation of the programme a large number of people was involved in discussions about the programme. These included regular meetings with the principals, formal and informal discussions with the teachers at the school involved in the programme, meetings with departmental officials, Medu staff meetings, as well as informal discussions with interested outsiders. It is difficult to keep an accurate record of all of these interactions. The list below is not comprehensive, but covers formal (often recorded) meetings with a range of individuals.

DET Officials

Acting Regional Director, DET head office, Pietermaritzburg, 2/07/92.
Circuit Inspector (DET), Edendale circuit, School A, Edendale, 22/10/92

School Participants

School A
Principal, 6/3/91
HOD and School liaison person, 12/4/91; 9/9/91; 26/6/92; 12/8/92.
Structured evaluation with three teachers, 5/6/91.

School B
HOD and School liaison person, 4/9/92.
English teacher, 18/10/92.

School C
Principal, 10/3/92.
Deputy-Principal, 4/9/92.

Medu Staff

Medu co-ordinator, 3/2/91.

Teachers' Forum editor, 3/2/91.

Management committee member, 15/3/93.

Other

Chairperson, Sadtu interim committee, Natal Midlands, 7/11/91.

Deputy Rector, Umlazi College of Further Education, 22/5/92.

FIELDNOTES

Extensive (if somewhat chaotic) fieldnotes provided much of the data for the descriptive chapters. These were impressionistic notes on experiences during the course of the two year programme. All successes and setbacks were recorded in point form in a diary, although at times there was some delay between the event and the recording thereof. This accounts for the date reference of the fieldnotes as monthly rather than daily.

A P P E N D I X   B

INITIAL EVALUATION OF GROUPWORK - SMERO HIGH SCHOOL 5 JUNE 1991

KEY - VW = VOLKER WEDEKIND
ET = ENGLISH TEACHER
BT = BIOLOGY TEACHER
HT = HISTORY TEACHER

ET What do you have for us today?

VW I just wanted to talk about whether people had actually tried using group methods, and to see whether there were any problems, whether it worked.

ET Others, you know, they automatically take a lead in groups, you know. You find others that are quiet...(inaudible)...

VW So you found that one or two people in each group dominated it?

ET Ya. Eight people in each group. You find that perhaps one or two are active and the rest is passive.

VW Oh really.

ET But anyway, we appreciate that because these people who are active are gaining something...

VW Ya.

ET ...They'll gradually join the chorus.

VW Would you say more people are active when you used groups compared to normal teaching?

ET Yeah. There are more compared to the time when you are working as a teacher.

HT And if you ask them to talk to their neighbour, I should think that the response is promising.

VW Is it? Did you try that?

HT Ja, we did.

ET They even stated out that they appreciate discussion groups.

VW Oh really?

HT They come to me and say: "Hey, this new method of yours it makes all of us to... to...

BT ...to participate...

HT ...to be involved."

ET Yah, they participate.

VW Thats good. So how many teachers are trying these methods on the whole staff? Just the three of you?

HT I don't know.

BT I don't know, but I have tried.

VW You've tried as well? How did you find it?

BT It worked very well. They are so active.

VW Is it?

BT And they understand.

VW So did you explain to them why you...

(INTERRUPTION) (...)

ET Ya, really it is working. These new methods. And then if you find that the whole class doesn't get what you say, that one who is promising can then explain to him more and then he'll explain to the class.

BT Ya.

ET Ya, that's working.

VW That's very good.

ET It lessens the burden.

VW Yes. And what about time. Is it longer?

ET Oh no!

B&H No.

VW Not?

ET It is only when you have got double periods that you can do that.

VW Oh I see.

ET Because one period is too short.

HT It is too short.

VW So how did you organise your groups? Did you move the desks around or just make people turn around?

BT I chose one leader.

VW One leader?

BT Yes, for each group.

VW How did you chose the leaders. Did you appoint them?

BT Yes.

HT I let the people to chose themselves leaders. So they know the students who are constant and they chose them as their leaders.

VW And then? Did you give them a specific task or tasks?

ET Ya.

HT They even set themselves tasks.

VW Like what?

HT Questions to ask some students and then the members of the group write the test and the leader marks and the teacher comes around and signs.

(...)

VW So what did you do in biology?

BT I approached leaders, then I gave them tasks to go and explain them to the pupils, then they explained to the pupils, the pupils were so happy! And then afterwards they gave them tests, most of them passed, they thought ...(inaudible)...

VW What section of Biology was it?

BT It was on earthworm.

VW So were they just explaining concepts?

BT No. Osmo-regulation, excretion, other groups were looking at respiration...

VW So you chose the better students...?

BT Yes...

VW ...and then you asked them to explain those concepts to the group...

BT Firstly, I explained to them, the group leaders, and then later on I gave them a chance to explain to the group. When I was there I did help them a little bit.

ET With me, because I found that, you know the time is not enough the class will turn to the back and work as neighbours. They just work as neighbours. Then for instance when we are teaching a play then they will try and analyse the play, find out the figurative language and to try

explain, others the characters, others...

VW So each group had a different...

ET Different topics, yes. And then would tell other groups. And if I isolate a big problem then I discuss it with the whole class.

VW So would you say it was generally worthwhile?

BT Yes.

ET Yes, yes. They get to know what figurative language is. I explained it, but when it is explained by another children then...

BT ...they understand it much better.

ET They understand much better from other students.

BT I don't know why!

ET I always emphasise that they should give points to the one who is writing. You know the others understand and participate and give points.

VW So one person is writing everything down?

ET Ja, but he must write what he has been told.

VW And then that person would report to the rest

BT To the class. Yes.

ET And then I always ask them, if someone writes a sentence wrongly, correct it if you see some mistakes. Then I deduce that they do understand it.

(...)

VW While the groups were operating, what were you doing?

ET We were going round from group to group.

BT Yes, we were just moving from one to the other.

HT Supervising.

ET To see how they work.

BT You know they don't even play or talk. They participate.

VW They work?

ET They don't get bored. Theres no problem.

HT They are well disciplined.

VW What standards were you doing this with.

BT All standard nine.

ET And then you know they get motivated when they see one of the students communicating in English. So they work in order to bridge the gap.

VW That's very exciting.

HT Do you have any DET exam papers, questions for history?

VW For...? Exam papers! Ja ..er..we've got.... I haven't got any here though.

HT We want to see how they phrase their questions.

VW So you want...?

ET All DET questions papers.

BT May I also have a syllabus...

(DISCUSSION ON SYLLABUS AND WORKPROGRAMME)

APPENDIX C

SCHOOL A WORKSHOP ONE - GROUPS

Some teachers use group work in their teaching while others do not. Those who do not use it claim that it does not work. Another group of teachers does not believe that they can implement changes in their teaching because of the following problems:

1. Classrooms: because of a lack of classrooms, pupils are usually overcrowded in classes

2. Textbooks: there is no access to books

3. Pupils: there are pupils who are not really keen to learn

However teachers can try to deal with the situation in a number of ways. Changing anything is usually difficult, especially one's teaching method. Changing one's teaching method can result in more work for some time, but everything will be normal afterwards. Teachers should negotiate with pupils and try new methods, even though there will be resistance from pupils in the beginning.

Obstacles

1. There might be resistance from teachers themselves because they might feel that the new method does not work.

2. There might also be resistance by other staff members to a teacher who tries to do something new.

3. While a lot of pupils claim that they support People's Education, they might resist a teacher who implements its ideas in the classroom.

Pupils can feel very insecure about a new method of teaching. New methods should be introduced at a fairly slow pace.

Action-Research: A spiral

The teacher plans a lesson, teaches it, observes himself [sic] and reflects on the lesson.

Although some teachers like the idea of observing lessons by colleagues, others might be uncomfortable with this because of their experiences during their teacher training period, where they were given marks for teaching in a particular way. Teachers should view this in a different way because they will be dealing with colleagues who will be helping them. They can even learn a lot from others in this way.

Group Work

There are negative and positive points to it. Group work encourages critical thinking,[41] but it also takes a lot of time. In large classes it is difficult to monitor it.

Pupils can be made to discuss a particular question with neighbours for a short time because some are too shy to speak in class or in English.

Project-work: More formal

Class can be split into groups and given a task to do. This takes a longer time than other ways of group work. Careful planning needs to be done when planning projects.

Classrooms should be laid out in such a way that group work will be easy to conduct. Laying-out classrooms in a particular way can be discussed amongst staff members.

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41 It is problematic to assert that groupwork does lead to critical thinking as there is no concrete evidence of this. Group work is widely used in a range of contexts and does not necessarily lead to critical consciousness.

Debates

Pupils can be divided into groups and argue a particular issue from different perspectives. This can help to show pupils that there might be more than one interpretation for one issue.

Peer Teaching

Here the teacher uses his strongest pupils as resources. Pupils can explain issues better than the teacher because they know better how their fellow pupils think and reason.

APPENDIX D

Report of the Teacher Development Fieldworker to MEDU, September 1992

Report on the School Based Methodology Programme for 1992

Introduction

1992 has seen a major expansion of the school based programme for Medu. Arising out of the pilot study conducted during the course of 1991 at Smero High School[42], MEDU decided to expand the programme, with modifications, to three schools in the greater Edendale valley. Although numerous difficulties, both internal and external, were encountered, the programme has strengthened and has the potential to form one of the core functions of MEDU.

Identifying the Schools

Given the fact that the co-ordinator/field-worker of the programme was a part-time employee it was felt that the expansion of the programme should not be too rapid. Initially a total of five schools were envisaged but other work commitments on the part of the field-worker resulted in his time being reduced from thirty hours per week to fifteen hours per week. This necessitated a scaling down of the programme to three schools.

To ensure continuity Smero was offered a place on the programme. At the end of 1991 the Smero staff had indicated that they wanted the programme to continue in 1992 and this was confirmed at a meeting with the staff in early February. Various other schools were approached on the basis of prior involvement in other MEDU programmes and the the

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42 See MEDU (1992) Report on Methodology Programme 1991 Unpublished: Pietermaritzburg
and
Wedekind, V.R. (1991) Action Research for teacher development towards People's Education Unpublished B.Ed paper: Pietermaritzburg

school based programme was discussed with them. KwaPata and Georgetown were selected to participate in the programme.

Liason

One person at each school took responsibility for co-ordinating the schools end of the programme. At Smero and Georgetown a Head of Department was asked by the principal to act as liason person while at KwaPata the principal took responsibility for this function himself. While all three were extremely co-operative and arrangements were made, two issues are worth noting. Firstly, MEDU had no control over who was and who was not invited to attend and, secondly, the degree to which that attendance was voluntary was unclear. The question of voluntary attendance was particularly difficult to assess where the principal was acting as liason person.

Our experience at Smero during the first year of the programme had clearly shown that a 'whole school' approach was unrealistic and possibly counter productive. We had thus insisted that the programme only include volunteers who were prepared to make minor sacrifices such as remaining after school or missing a lunch break.

The Programme

As in 1991, the programme was envisaged as following a cyclical pattern of (1) identifying issues and problems, (2) planning collectively to overcome these difficulties, (3) implementing the strategies developed, (4) assessing the impact of these new strategies, and emerging out of this, going back to (1). MEDUs envisaged role was as facilitator of this process as well as providing some material backup during the implementation stage.

As in 1991, an introductory workshop was held in the two new schools prior to beginning the cycle, where teachers identified the range of issues that they felt needed to be addressed. A significant development in this regard was the change in focus on MEDUs part (we de-emphasised the methodology aspect of the programme as we found in 1991 that it was impossible to divorce methodology from management and other issues) and a shift in

the locus of responsibilty amongst the teachers (in 1991 the teachers located all the responsibility for the difficulties they were facing on external factors whereas one of the first issues that teachers identified this year was their own lack of motivation and confidence).

Using this as a basis for the programme, two full cycles were run in the schools in the first six months of the year. Initially three cycles had been planned but this had to be reduced due to various factors discussed under constraints below. Each cycle entailed one workshop with the entire group, two days of individual meetings at each school and then a collective meeting to reflect on the effectivity of the strategies adopted. Issues covered included teacher motivation, pupil motivation, note taking skills, collaborative teaching and teaching with limited resources

A further cycle is in progress currently, which will be followed by two mini-cycles focussing on exam strategies.

A joint evaluation and planning workshop with the three liason people has also been held to discuss the long term future of the programme.

In all, a total of 40 visits will have been made to the schools involved in the programme.

Constraints

1992 has been marked once again by political turmoil in the Natal Midlands which has obvious effects on schooling. In total a minimum of three full school weeks have been lost due to stayaways, mass action and violence. At times it has not been safe to travel in to Edendale and a number of teachers and principals have been shot or had their cars stolen at gunpoint in the greater Pietermaritzburg area during the course of 1992.

Added to this are the ongoing demographic shifts that have occurred around Pietermaritzburg which have resulted in all three of the schools we are working with facing massive increases in their pupil intake way beyond their physical and administrative

capacity. KwaPata was still dealing with admissions at the end of March, two months after the school term had started. Thus, while we were able to identify the schools early on in the year, we were unable to persuade the liason people to organise workshops until April, effectively more than a quarter of the school year being unused.

Furthermore, the three schools we are working with are amongst the least resourced in the Edendale circuit which pose major challenges to the programme. While one must expect to work with difficulties such as classes of 130 students, matric students who are functionally illiterate in English, an exam oriented school system, and no electricity or telephones, these do nevertheless create organisational difficulties and more seriously, generate expectations of MEDU which it does not have the capacity to deliver.

Finally, MEDUs internal organisation underwent significant changes during the course of the year which required energy from all the staff. Added to this was the fact that the field-worker was asked to act as co-ordinator of the whole unit up until the beginning of April due to a sabbatical leave. The maternity leave of the Resource Centre Worker and a number of changes in administrative and other staff also meant time spent away from the programme. With just two days a week allocated to this area of work any time lost can impact significantly.

The time limitations were offset to some extent by the voluntary assistance given to the programme by Sabine Meyer, a German volunteer worker in South Africa, who we are greatly indebted to.

Conclusion

At a major mid-year evaluation held in July and followed by a workshop with the liason people in the three schools, it was felt that the programme, despite the above constraints, had been very successful. A clear line of development from the lessons learned during the case-study of 1991 had been followed. Although no longer involving the whole school, the quality of the work had significantly improved. Teachers on the programme were far more critical and open to suggestions and were more comfortable with our role. Invitations to sit

in on classes, and in some cases to teach with the teachers were indicative of the level of trust developing between the teachers and the unit.

While 1991 had seen only one complete cycle in the year, 1992 has seen this expand to three full cycles and two mini-cycles at three schools ie. fifteen workshops with forty teachers.

However, despite the positive aspects of the programme during 1992, the long term sustainability of this type of programme was questioned if the structure remained the same. After careful consideration, involving the programme staff, the rest of the unit, and the liason people from the schools a number of proposals were put forward to the management of the unit for their consideration:

- In order to achieve sustainability, the programme needed to train teachers in each of the schools who could play the type of facilitating role that MEDU staff were currently playing. It was felt that the present structure was not capable of training someone with sufficient skills to run the programme in a school. MEDU was still central to basic issues such as calling a meeting with the programme participants. Furthermore, in order for the teachers to run the programme themselves, a deeper theoretical understanding of action research and general educational issues is needed which is also not catered for in the current programme.
  It is proposed that the programme concentrate on training a small core of teachers in each of the schools as facilitators. A three to five year period was envisaged for this to be completed.

- From the experience of the past two years where the majority of the teachers who have participated in the programme have taught in senior secondary standards, we would propose that the focus of the programme should be on the junior secondary standards. The SS teachers tend to be forced to focus disproportionately on the final examinations and have limited freedom to implement new approaches to the syllabus and teaching methods.

- It was felt that such a programme would require a minimum of one full-time person to work on it. Ideally, the field-worker would work with teachers in a similar subject area to her own expertise.

- The programme should become more integral to the overall work of the unit. The teachers on the programme would need to be involved in the subject groups, host workshops at their schools and link directly with the resource centre. A clear commitment to MEDUs aims would be a pre-requisite.

- The programme should link in with other programmes in the country through exchanges, short courses and certification. It was suggested that aspects of the training may be done in conjunction with the UNP Education Department and be credited toward a degree or diploma.

A detailed proposal for the structure and content of the revised programme is being drawn up at the moment.

End/VRW/

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