JET EDUCATION SERVICES

CONFERENCE PROCEEDINGS

DEPARTMENT OF EDUCATION

BALANCING SUPPORT AND ACCOUNTABILITY TO IMPROVE SCHOOL PERFORMANCE

NATIONAL CONSULTATION ON SCHOOL DEVELOPMENT

SHERATON HOTEL
PRETORIA, 29 JANUARY 2002

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FOREWORD

by Duncan Hindle
Deputy Director General: General Education
Department of Education

The search for school effectiveness is a lifetime one, and the Department of Education welcomes the further contribution which this conference has made towards understanding and achieving school effectiveness. Our appreciation goes to JET Education Services for facilitating this dialogue.

Defining school effectiveness is not easy because of the many and diverse views which are held about the purpose of education. In South Africa, the term must be given additional meaning by the need to rebuild our nation. We hold that education serves an academic and a social purpose, and an effective school is therefore one which offers leadership to its pupils in both these areas.

It is agreed that school effectiveness is enhanced by high levels of support. Teachers and officials must be well trained for the responsible positions they hold, and assisted in their professional responsibilities by the advisory services of the departments of education. Improvements in the training of teachers, and in career prospects in education, as well as the strengthening of district capacities, are all contributing to this imperative.

But school effectiveness is also improved by rigorous and fair systems of accountability, and teachers and managers must be prepared to demonstrate their professional competencies through various performance management systems. Performance management systems enable us to identify good practice, and promote it, as well as to identify

impediments to school effectiveness and address these.

The introduction of policy on Whole School Evaluation is a milestone in the promotion and maintenance of quality standards in education. This instrument serves to identify and promote effective schools, in response to many concerns about the quality of our institutions. Trained school evaluators will utilise a global perspective to assess the contribution of a school to the academic and social goals which we have set ourselves, and to recommend interventions where necessary.

Effective schools and committed teachers have much to look forward to. Development opportunities are presenting themselves in many areas, and the introduction of quality standards for schools and teachers will ensure that those who deserve recognition are given it. Our parents and our children deserve effective schools, and we must not fail them.

INTRODUCTION

by Thandiwe January-McLean
Chair: Board of Directors
JET Education Services

We have come a long way since 1994 in re-organising South Africa's schooling system. Judging from the matric results of the last two years we are well on the road to improving the quality of schooling, particularly for poor children.

Yet we still have a long way to go, and more resources are being committed to this task than ever before. It is also one of the most active areas of co-operation between:

- government at national and provincial levels,
- the South African corporate sector,
- international donors, representing foreign governments friendly to our country, and powerful private agencies,
- NGOs, and
- civil society organisations, such as teacher unions and other professional bodies.

It is fitting that these parties come together to discuss the issue of school development. The purpose of this consultation is to seek better synergy between all the parties involved in improving schooling, which is the largest collective enterprise undertaken by most societies.

Since the inception of the Trust in 1992, JET has been active in funding, managing and researching school reform programmes in South Africa. Over this time the dominant activities have evolved rather rapidly, from a focus on in-service training for teachers in the early nineties, to the large, multi-faceted, multi-million rand programmes which, one way or another, now involve something in the order of 10% of the nation's schools.

Over this time we have collected a wealth of information on all aspects of schooling and school reform programmes in South Africa. Two years ago the JET board allocated funds towards collating and analysing this knowledge, and feeding it into the public domain in the interests of promoting a more informed debate. This conference – organised around a systemic model for schooling - represents an opening round in this debate. It will be followed later in the year by the publication of a book – with the working title *Getting Schools Working* – which will systematically lay out all the information that JET has collected during this two year research process. In the meantime, these proceedings will provide an important insight into the way that key role players view the process of school reform in general, and systemic reform in particular.

KEYNOTE ADDRESS

IMPROVING THE QUALITY OF TEACHING AND LEARNING

by Kader Asmal
MP, Minister of Education

Good news seldom makes the headlines - prophets of doom sell newspapers. But we have good news, and it deserves to be reported. In the face of enormous difficulties and a hideous legacy, we have achieved almost all our school access targets, with near universal enrolment for boys and girls in general education. We have also made good progress in ensuring that schools start teaching on the first day of the academic year and continue to do so for the full 196 days. These are enormous achievements.

Of course, it is not enough simply to be at school for a full year - as important is the quality of education. More and more effort is being placed on school improvement and development for greater effectiveness and efficiency. Our commitment is to improving the quality of teaching and learning. Last year's matric exam results are confirmation of our efforts. Seven of the nine provinces improved their results. The matric results improved by 9% in 2000 and 3.8% last year. The overall pass rate improved from 48,9% in 1999 to 61,7% last year.

We have no intention of resting on our laurels. The quality of teaching and learning must be constantly reviewed. In an ever-changing and challenging world, we need to provide pupils with the best education that we can offer. How do we measure the quality of our educational system? Examination results are but one of the measures we can employ.

We must constantly review and reflect on our whole school practice. The management and administration of our schools cannot be separated from what

happens in the classroom. Teachers cannot be expected to deliver quality education in the classroom if they do not have adequate administrative support, libraries and on-going INSET. We must constantly review and reflect on our whole school practices. In this respect, a national policy on Whole School Evaluation was announced in the Government Gazette, of 26 July 2001. This policy aims to holistically monitor and evaluate the performance of individual schools as different entities within their unique environments.

Phase One of Whole School Evaluation, viz. school self-evaluation has commenced in the nodal areas in most provinces and will continue until March 2002. Major external evaluation activities are scheduled to start in March 2002. The first report on Whole School

Evaluation will be published in January/February 2003.

The authoritarian ways of the past can no longer work. The world has changed and so has South Africa. The emphasis now must be on development, support and accountability. True progress depends on incentives, but incentives tied to accountability. When radical changes take place there is a tendency to swing from one extreme to the other. Latterly, in reaction to the authoritarian ways of the past, we have tended to favour a developmental approach and have relied to a great extent on the good will of our teachers. Thousands of workshops, seminars and training programmes have been held. We have even coined a new lexicon: people have been "workshopped" or "capacitated" in pursuit of quality. At the same time, we must confess that many of these "interventions" (another coined word) have had limited impact.

Under the old regime there was little understanding of what a developmental approach in education might be. The accent was on authoritarianism, which was a reflection of the wider authoritarian ethos of apartheid. Not too much attention was paid to actual classroom practice.

Fundamental pedagogics, the educational philosophy developed under apartheid, demanded subservience to authorities, whether they were political, administrative or academic. As far as teachers were concerned there were right answers and wrong answers and not much in between. It was in such an environment that rote learning got its bad reputation. The focus was primarily on ensuring that records of work were up to date and that the right forms had been filled in. Little was done to provide good role models or to explore new and innovative methodologies. And, even when teachers were exposed to new and innovative ways of teaching, the physical conditions of our schools, the overcrowding, the lack of support materials and the lack of interest by those in authority militated against quality education taking place.

In rejecting authoritarian approaches we sought to build on the enormous commitment that had developed during the struggle years, when teachers and learners, together with community activists provided evening and Saturday classes, established Parent Teacher Student Associations and developed "people's education." It was felt that, if so much could be done under the most extraordinary state oppression, much more could be achieved in the new political order. Legislation for the establishment of school governing bodies with significant powers was one of the most important developments of the new era. This was democracy in action and democracy devolved to grassroots. Understandably, we held the idealistic view that our people would be motivated and altruistic after all the years of struggle: they would do anything for the greater good.

Sadly, but inevitably, the realities of reconstruction soon became apparent. There would be no quick or easy victories. The keystones to progress remained: the hard work of individuals and communities. The old motivations no longer held sway.

In the spirit of the African Renaissance our State President has called upon the nation to rekindle the flame of voluntarism that was so much a feature of the past. The embers are there, but they need to be fanned.

I am happy to report that one of our schools in Botshabelo near Bloemfontein, visited by my departmental officials on the

opening day of the school year, was full of volunteers who were working without any thought of reward. Many of them were not even parents of children at the school. Their contribution is for the long term - perhaps their grandchildren will benefit. The community as a whole is the immediate beneficiary. A new spirit of selflessness is abroad. It is out of such selflessness that true revolutions are born.

We were right to reject the authoritarian methods favoured by the School Inspectors of old. The quality of teaching and learning was often incidental to keeping order. Provided that managers were filling in the forms correctly nothing else much mattered. When we came to power we opted for a form of negotiated developmental appraisal.

The South African Council for Educators also adopted a similar approach. The accent was on development rather than sanctions, incentives rather than punishment. Perhaps the unconscious thought was that because our people had been denied opportunities to develop as professionals in the past, it would not be right to sanction them for breaches of professional ethics of which they had little or any experience or understanding.

This position may have been justified at the time, but public patience began to wear thin when repeated accounts of poor teaching were reported, and it appeared as if some teachers were exploiting the situation. There can be no excuse for teachers not arriving at school on time in the morning, for not remaining in class for lessons and for absenting themselves from school before the end of the day. In the public mind, the developmental approach was seen as legitimising unprofessional behaviour. Consequently, there were increasing calls from the public, government and the unions for greater accountability. Teachers must teach and learners must learn!

For schools that are not performing as they should, on the 22nd and 23rd January this year a National Forum for Learner Performance in grades 10 – 12 was held at which all nine provinces were represented. During the workshop the improvement strategy for 2001 was assessed and the strategy for 2002 was refined.

Teams from the Directorate: National Examinations and Assessment, have already concluded their first visits to all 10 regions in Mpumalanga. The regional/district offices as well as at least one school in each region were visited and the structures activated to implement improvement strategies.

Visits to Eastern Cape will be starting this week and will continue until all regions have been visited. Visits to the other seven provinces will then follow, as well as follow-up visits to Mpumalanga and Eastern Cape.

No one can deny the need for on-going professional development. We must never neglect to support and develop our teachers. Support is required in many areas: subject knowledge, pedagogic approaches and professional ethics. Incentives must be used where necessary to ensure that development is sustained. However, we must guard against overloading schools with programmes and initiatives that do not inform one another. Too many badly coordinated initiatives are not only difficult to monitor, they also stretch to the limit already thinly stretched human resources.

We have put substantial resources into upgrading programmes and special initiatives. For example, last year 150 teachers in each province were awarded

bursaries to further their studies in Maths and Science. Another 150 in each province are being selected to commence the two-year programme this year.

Such incentives attract the ambitious and committed teachers. Sadly, they are of little encouragement to those teachers who entered the profession for less than professional reasons. There can be no room for mediocrity in the profession. We must henceforth ensure that it is the brightest and the best, those with a sense of vocation, who are attracted to teaching, not those who have no other options.

We have used and will continue to use a combination of incentives linked to accountability mechanisms to improve the quality of education in our schools. The National Teacher Awards, presented annually by the President, is one example. The Awards have no financial incentives, but they provide an enormous boost to the status and esteem of those who win them. We also instituted the Most Improved Schools Award, which recognises the efforts of teams of professionals.

These are important instruments for rebuilding and sustaining the morale and dignity of teachers. Perhaps we will have to start looking at an award for the most improved district to support the professional advisory staff and other officials who work with schools.

I believe we also need the means to reward teachers differentially according to performance and context. We may thereby encourage good teachers, especially in the "gateway" subjects, to teach in under-performing schools. Such incentives need not necessarily be financial, but there should be some mechanism which recognises and rewards outstanding and dedicated service. At the very least, teachers who have "served their time" in a poor school should be given preference for promotion over candidates who have spent their careers comfortably ensconced in quiet suburban schools.

These supportive approaches have already shown their value in terms of the improvements we have seen since 1994, but we must also use sanctions where they are necessary. Gauteng MEC for Education, Ignatius Jacobs, was seen on television recently wielding a very big stick against teachers and pupils who reported late on the first day at school. I have been forced to do likewise on my recent visit to Durban schools. I challenge anyone to suggest that these were not appropriate responses. Where things are wrong, we must say so, and we must take steps to fix them. Nothing in our liberation struggle or in our new democracy suggests that we should tolerate indiscipline or laziness.

Consequently, we have taken a number of steps to improve accountability, some of which will be elaborated on by the Director General. Broadly, initiatives affect

- classroom teachers,
- school based managers, and
- office based officials.

Our view is that accountability is required from each of these groups of individuals as follows:

- an upwards accountability, to the department (which pays salaries), and the national and provincial governments that make the laws and develop policy;
- a downwards accountability, to the learners, who are the primary clients of teachers, managers and administrators; and
- an outwards accountability, to the parents and communities served by education.

As the Ministry of Education we will not neglect our developmental obligations. We will train our teachers by means of in-service programmes. We will develop our school managers and governing bodies to enable them to do their jobs efficiently and effectively. We will support our officials in every possible way,but we will not tolerate any approach which tries to defend a lack of effort. Ability and attitude are different things: with the right attitude, and some ability, most things are possible. But without a positive commitment to the task, even the most able person, in ideal surroundings, will accomplish little.

ACCOUNTABILITY AND SUPPORT: IMPROVING PUBLIC SCHOOLING IN SOUTH AFRICA

A Systemic Framework

by Nick Taylor
JET Education Services

INTRODUCTION

South Africa provides, by any developing country's standards, access to the opportunity to learn to a very high proportion of its young people. Participation rates at the primary level are close to 100%, and at the secondary level they are also high. And since 1994 the state has made every effort to differentially redistribute resources toward the poorer parts of the system (Taylor, 2001). However, the point has been made that the quality and cost effectiveness of this access are way behind those of countries that are far poorer than South Africa (Crouch, 1997; 1999; Taylor, 2001). Indeed, the opportunity to learn is about much more than access, although obviously this is a prerequisite. For that opportunity to be realised schools must be well managed and classes well taught. It has long been realised that in South Africa much more needs to be done in our schools and classrooms if we are to offer real opportunity to our young citizens.

The problem is widely recognised and huge resources are being committed to improving the situation. Dozens of school development programmes have been in operation over the last five years, and more are commissioned every year. Up to the last year or two these were largely initiated from the non-governmental sector, although there are probably none in which government has had no involvement. It is estimated that something in the order of

20% of the nation's nearly 30 000 schools are involved in donor- and NGO-initiated development projects of one or other kind, with a total off-budget expenditure of up to R500 milion annually. This includes five year commitments of some R120 million by USAID, and R300 million by the Business Trust, a new five-year allocation of R240 million by the British Department for International Development, following

the completion of the R90 million Imbewu programme; smaller but still very significant contributions by the Joint Education Trust, the National Business Initiative, the Royal Netherlands Embassy and the Danish International Development Agency; and dozens of smaller projects supported by a host of local and offshore donors. Government has begun to initiate its own programmes of targeted reform, such as the School Effectiveness Initiative (SEI) and the National Strategy for Maths, Science and Technology.

In general the effects of these efforts have been hard to discern to date. To a very considerable extent this apparent lack of impact is due to the enormously complex nature of schooling, and the consequent difficulties involved in bringing about the alignment of the diverse elements required to make a difference, to say nothing of the long haul needed before any significant changes at the institutional level begin to manifest themselves in improved outcomes. There are also unresolved debates about what constitutes significant change and how it should be measured.

While our information base on school reform remains pretty insubstantial, the research tempo has begun to pick up in the last two or three years, and much data has begun to accumulate, from government, the Higher Education Institutions (HEIs) and Non Governmental Organisations (NGOs). In order to collate, extend and make sense of this work, JET established the Research on School Development programme in 2000 so as to get an idea of the scale of school development activity in the country, to try to understand how the different initiatives are structured, and to try to establish what the success factors might be. The overall objective of the research is to promote a more informed debate among the actors on how best to proceed with school development. This conference has been convened to consider the research findings, and to take this debate a step further.

The products of the research programme to date include:

- a paper by Joe Muller and Jennifer Roberts entitled The Sound and Fury of School Reform, an overview of the international debate
- a Database of school development programmes operating in South Africa during 2000/01
- twelve case studies of donor funded school development programmes, and a synthesis paper by Jennifer Roberts
- an evaluation of the Education Action Zones in the Gauteng Department of Education, by Brahm Fleisch
- learner performance data in literacy and numeracy from over 43 000 pupils in grades 3, 6 and 9 in 933 schools drawn from all nine provinces, co-ordinated by Penny Vinjevold
- data on school management and classroom practices in some 200 of the schools in which testing was undertaken
- an analysis of some of the social and economic determinants of language and maths performance in 36 disadvantaged high schools spread across all nine provinces, by Charles Simkins and Andrew Paterson

This paper is an attempt to derive a systemic view of school reform from this work. By systemic I mean:

- identifying the main components which comprise the enterprise of public schooling,
- assessing how the functionality of each could be improved, and
- determining which levers are most effective in fitting the component subsystems together better and bending them to our needs.

ACCOUNTABILITY AND SUPPORT: THE TWO PILLARS OF SYSTEMIC FUNCTIONALITY

Two kinds of measures are available for improving the equity, efficiency and quality of public schooling. Accountability measures give direction, set performance standards, and monitor outcomes; they are used to manage staff and resources; they offer incentives, and administer rewards and sanctions as a consequence of performance. Support measures empower individuals to meet the expectations set by these demand drivers: they build capacity, provide training, establish systems and structures, and distribute resources.

Mechanisms designed to hold institutions and individuals accountable include curriculum frameworks, assessment and certification systems, school inspection, performance management reviews, financial auditing, research, and public debate. They are administered mainly by the state at different levels - national, provincial, district and school. Researchers and the media also play a crucial role in informing and propagating public debate.

Support mechanisms include training programmes, and the provision of buildings, utilities, learning support materials (LSMs) and other equipment. Appraisal schemes, such as the proposed development appraisal system (DAS) have the potential to play an important role in identifying individual training and support needs. The principal agents of support measures are state officials at provincial, district and school levels. HEIs, NGOs, teacher unions and other professional associations are important in designing and delivering training programmes, and enhancing the professional status of teaching.

APPROACHES TO SCHOOL DEVELOPMENT

The debate on school development is long and complex. As is the case with many debates in education it is riven with the kinds of ideological wars which dichotomise often technical issues into opposing points of principle. Some of these positions refuse to acknowledge the value of empirical evidence in adjudicating their claims. So we live in a world where anyone can say what they like and we have no way of deciding whether the grand plans visited on our children in the name of one or other evangelism are part of the problem or part of the solution.

Fortunately, there are signs that we are emerging from this long night of what Moore and Muller (2002) call 'voice sociology', in which knowledge is inextricably linked to identity and personal view. The fact that in 2000 the Minister of Education could exercise the political and intellectual courage required to review Curriculum 2005 starkly demonstrates this point. The question as to the extent to which this ground was prepared by the terms of the public discourse (see, for example, Muller, 1998; Jansen, 1999; Taylor and Vinjevold, 1999) is an important question when considering the role of public intellectuals, and one that is occupying several historians for this reason.

Outside-in and inside-out initiatives

The JET paper analysing the literature on school reform (Muller and Roberts, 2000) concludes that the decades-long standoff between defenders of the 'outside-in' (standards-based, school effectiveness) approach, and proponents of 'inside-out' (school-focused or school improvement) reform is giving way to a convergence between the two models. There is a growing realisation that a systematically

constructed combination of the two is required to break the very poor record, internationally and in South Africa, of success in improving the quality of ineffective school systems. But that is a little ahead of my story: I want first to briefly contrast the outside-ins and the inside-outs.

Outside-in initiatives generally start with a set of standards: this is the locomotive that pulls the learning train. In contrast to early efforts, which focused on standards that proved to be too vague to provide firm guidelines to teachers, the outside-in reformers have come to realise that standards should be clear, parsimonious and rigorous. Further, these should be accompanied by exemplars of achievement which model the level of performance required of students, and by a comprehensive set of materials which support classroom instruction. Assessment of student performance provides the hard data which enables outside-in initiatives to 'steer by results', and gives all actors in the system the summative results of their combined efforts. The problem with this approach, on its own, as several critics have pointed out (see, for example, Elmore and Burney, 1999), is that school managers and teachers are often expected to perform at new levels for which they are not equipped: the capacity to meet the new expectations needs to be built among individuals and institutions.

By contrast, inside-out reformers have tended towards a celebratory rather than an investigatory approach; indeed, until relatively recently, these approaches have tended to eschew the assessment of learner performance as a measure of school improvement. However, agreement on student achievement as the ultimate measure of the health of both individual institutions and the school system as a whole is now, if not quite a shared article of faith, at least a point of convergence between the 'inside-outs' and the 'outside-ins'. There is also now much wider appreciation for the fact that a significant component of learner performance is a reflection of the home environment, and that it is the value which a school adds to student entry level performance (the 'residual variation'), which measures the worth of the school. Work in progress in South Africa (Crouch and Mabogoane, 1998; Simkins, forthcoming) indicates that home background may contribute a relatively small proportion to school achievement within the disadvantaged sector.

Another feature of early 'inside-out' reforms was the tendency to focus primarily on issues of organisational culture: shared values, vision and teamwork. Latterly there has been a shift towards the realisation that, in addition, an explicit focus on improving classroom instruction is a prerequisite to improving learner achievement. Even more important, there is a growing awareness that school improvement needs to be tailored to the specific state of development of the school. Thus, severely dysfunctional schools (Type I schools, in the terms of Hopkins and MacGilchrist, 1998) require organisational stabilisation, the establishment of basic management systems, and governance and management training, in order to establish the conditions conducive to effective teaching and learning. Only once a threshold level of institutional functionality has been achieved (Type II schools) can interventions at the classroom level be effected.

Up to at least 1995, in-service training (INSET) for teachers or principals was the predominant form of activity aimed at school quality improvement in South Africa. In that year the Teacher Education Audit estimated that there were over 100

programmes of this type in operation in the NGO sector alone (CEPD, 1995). These were classic inside-out approaches, as were the Whole School Development (school-by-school) programmes which began to emerge in the mid- to late 1990s. The latter are premised on the assumption that, while improving the capacity of individuals may be a necessary condition for institutional change, it is not sufficient; there must also be an explicit focus on institutional development.

Mainly inside-out reforms

Although we have commenced the sea-change necessary to create the conditions for effective systemic reform, it can probably still safely be said that most school development programmes currently in operation in South Africa lean towards the inside-out, to some extent by default. This default occurs for two reasons. First, because accountability measures, with the exception of the matric exam, do not yet bite down to the school level. Schools are in large measure not held accountable. Consequently, training programmes and other support measures, because they have no outcome indicators of change, tend to focus on soft issues such as institutional vision and culture, and not on the technicalities of, for example, procuring and managing textbooks and stationery, or quality assuring the delivery of the curriculum. The participants are free to implement the lessons of this training in their districts, schools or classrooms, or they may decide not to. No one would know the difference because of the absence of monitoring and other accountability sub-systems. It is a premise of our systemic model that the impact of programmes of this nature would be immeasurably increased if they were linked to defined outcomes such as improved learner performance: managers and teachers would know what is expected of them, and be better motivated to utilise training to assist in meeting these performance standards.

A second reason inhibiting these programmes from moving from inside-out to systemic mode is because the training providers are often stuck in the former, perhaps more by habit than design. It must be asked at this stage whether the kind of short and fragmented bursts of workshop-based training offered by NGOs and consortia in these school development projects can build the deep knowledge structures and professional comportment among teachers and managers required to improve the quality of schooling. A related question is whether training programmes for individuals can have an impact on the system if they are not linked to institutional development.

Mainly outside-in reforms

Since the demise of the apartheid government outside-in reform initiatives have been notable by their absence. The first to break ranks was the Education Action Zone (EAZ) programme adopted by the Gauteng Department of Education (GDE) in 2000. The EAZ programme represents a classic outside-in initiative, albeit in a restricted form, which may hold important lessons for school reform in South Africa. Although designed as a comprehensive systemic initiative which included monitoring schools and providing support and training to principals, teachers and pupils, and although some of the latter components were implemented to a limited extent, in effect the EAZ focused largely on the first of these measures (Fleisch, 2001). Furthermore, a project approach was adopted in administering the programme, rather than strengthening the systems and capacity for school monitoring and support in the standard line functions of the GDE. Thus, the EAZ was managed

from the provincial head office, with special units responsible for earmarked schools, and reporting directly to the MEC and Superintendent General.

We will argue below that this was an unsustainable strategy which, whatever its initial gains, would reach a ceiling fairly rapidly. Nevertheless, the EAZ, injected a renewed respect for the legitimate authority of government and began the process of building a culture of accountability towards pupils, parents and the taxpayer, on the part of schools, principals and teachers. The EAZ was accompanied by an impressive rise in matric results in targeted schools, both in the absolute sense and relative to non-EAZ schools. It would seem likely that this improved performance is a direct result of the programme, and a follow-up study is in progress, aimed at identifying the specific mechanisms through which this success was achieved. The following are among the most noteworthy features of the programme:

- 67 schools, or 14% of Gauteng's high schools which offer grade 12, were involved.
- It targeted the worst performing schools in the province: in the 1999 matric exams all 67 schools achieved pass rates of 30% or below, with 64 of the schools at 20% or below.
- In 2000 only 29 schools remained at 30% or less pass rate bracket, with only 13 at 20% or below.
- 90% of EAZ schools achieved the targeted 5% improved pass rate.
- The aggregate pass rate for EAZ schools improved by an average of 14,5%, which exceeds the improvements shown by both other former DET schools in the province (up 10,1%), and all public schools in Gauteng (5,3%).
- The number of matric passes in EAZ schools increased from 1677 in 1999 to 2313 in 2000 (up 38%).
- The number of distinctions achieved by EAZ schools increased by 422%, from 37 in 1999 to 193 in 2000.
- The number of university exemptions increased by 47%, from 107 to 157.
- These developments were accompanied by a marked decrease in the number of candidates enrolled for the exam at EAZ schools. While there was a small overall decrease of 1,7% for the province as whole, and a drop of only 3,4% for former DET schools, EAZ schools showed an aggregate decrease of 25,4%.

The fall in enrolments at EAZ schools may be due to parents and pupils voting with their feet and moving to schools with better prospects, or to EAZ schools applying stricter criteria for registration, or any combination of these factors. Fleisch (op. cit.) speculates that, whatever the origin, the smaller numbers of candidates may have contributed significantly to improved achievement, by providing greater access on the part of students to resources, and changing the climate of grade 12 classes; these conditions were reinforced by the increase in study time provided by the monitoring of attendance and punctuality. However, an interesting rider to this conclusion is provided by a small number (eight, or 12%) of EAZ schools who improved their results while increasing their roll, or at least holding steady.

Systemic reform

Systemic reform programmes may be seen as a combination of outside-in and inside-out approaches. Whereas outside-in programmes employ mainly accountability measures, and the inside-out initiatives focus mainly on support activities, systemic reform is premised on the need to align and mediate accountability and support. In summary, the rapprochement that is occurring between the two broad models of school

reform is leading to a convergence around the importance of linking classroom instruction to an external accountability system. There is general understanding that, without an explicit focus on schools and classrooms, improved learning is very difficult if not impossible to achieve. And without attention to building capacity in higher levels of the system, change cannot be directed and monitored effectively, nor is it likely to be sustained beyond the life of the project, or replicated in non-project schools.

Large-scale systemic reform programmes have been gaining ground in the last decade in the US (Elmore et al. 1996) and in 1997 what may prove to be the largest and most successful such initiative, the National Literacy and Numeracy Strategy (NLNS), was launched in England (Fullan, 2001). In announcing the programme the Minister set targets for the improvement of the national average for literacy scores for 11 year-olds from 57% to 80% by 2002, and an increase in numeracy scores from 54% to 75%. He promised to resign if these goals were not met.

It would seem that the Minister's job is safe. By 2000 literacy results had reached 75% and numeracy scores 72%. Michael Fullan (op. cit.), the evaluator of the programme, describes these results as "astounding", given that 20 000 schools and 7 million children are involved. He has no doubt that the 2002 targets will be met. Fullan ascribes this success to a number of features of the programme, including:

- a national plan, setting out targets, actions, responsibilities and deadlines
- a substantial investment, sustained over at least six years and skewed towards those schools most in need
- an expectation that every class will have a daily maths lesson and a daily literacy hour
- both initial teacher training and the ongoing professional development of administrators, principals and teachers designed to enable every primary school teacher to understand and be able to use best practice in teaching literacy and numeracy
- a major investment in books (over 23 million new books since 1997)
- regular monitoring and extensive evaluation by Office for Standards in Education (OFSTED)

Clearly the programme has been designed so as to line up and integrate accountability and support measures so that they operate in tandem, respectively pulling and pushing the schooling system to higher levels of performance. Fullan's diagnosis is that almost all the gains can be attributed to an increase in teacher motivation. He is also convinced that the improvements in learning performance are valid, in other words, that the results are not just a trick of measurement, but that children actually are reading, writing and doing maths significantly better than they were before (although he has some reservations as to whether the programme may be confining its target to too narrow a band of knowledge and skills).

However, he does raise a question as to how lasting the gains might be. In emphasising the key role of government in large scale reform, Fullan identifies three elements. Government should:

- demand accountability of schools and teachers,
- provide incentives to perform better, and
- build capacity to manage and teach more effectively.

While the National Literacy and Numeracy Strategy has been very successful at implementing the first two elements,

Fullan contends that deep-rooted capacity is not being built. This may seem to be quibbling in the face of a massive achievement, especially in view of the fact that the programme has focused on the professional development of teachers. But what Fullan means by his criticism is that schools are not undergoing the fundamental transformation required to turn them into learning organisations: only when this happens will the achievements of the programme be truly sustainable.

CURRENT DEVELOPMENTS IN SOUTH AFRICA

Accountability Measures

The new government inherited a system of education in which the authority of the state had been steadily eroded over a period of two decades. While the new dispensation was very popular in the majority of schools, individuals and institutions by and large had never known life under a functional system in which the authority of line managers was respected. Instilling the idea of legitimate authority, and setting up accountability systems for the exercise of this authority has proved to be one of the most intractable problems over the last eight years. This is true of every sphere of the public sector. In the last two or three years the 10 Departments of Education have begun systematic efforts to improve accountability, in terms of directing, monitoring and steering the system (Ministry of Education, 2001).

Directing

Once the new National Curriculum Statements (NCS) have been finalised, the system will, for the first time since 1994, have a clearly defined framework of what teachers and pupils should be doing and achieving in classrooms. This makes possible the co-ordination of the efforts of teachers, textbook writers, and assessors in directing, delivering and monitoring teaching and learning. The NCS will be the intended curriculum, which sets the goals for learning.

Monitoring

Virtually the only performance monitoring system in place at present is the matric exam: a push on the part of government over the last two years to improve exam scores would appear to be bearing some fruit, with the 2000 results for Gauteng quoted above replicating themselves in most provinces. Taken together these results are most impressive: not only did we in that year produce more matriculants, and not only did we improve the quality of these products, but we did it while reducing the number of candidates by over 4%, hence achieving significant cost savings in the process (although the drop in enrolments, even more marked in 2001, is a phenomenon which requires investigation). In other words, quantity, quality and efficiency were all improved simultaneously. While it is not necessarily always the case that any increase in the quality of such outputs is invariably associated with an improvement in equity, given that the 2000 improved matric results were largely the result of improved performance in disadvantaged schools, they also indicate a more equitable distribution of learning opportunities for South African children. This is supported by the very significant decrease in the number of schools in the 1-20% and 20-40% pass rate brackets, since most of these schools are situated in the poorest areas.

The results for 2001 are also very interesting as seen in Table 1.

The national improvement in the pass rate (+3,8%) is not very meaningful for at least three reasons. First, this was the first year in which the so-called Continuous Assessment (CASS) scores,

TABLE 1: SENIOR CERTIFICATE PASS RATES FOR 2000 AND 2001 BY PROVINCE			
	PASS RATES %		
	2000 (Change on '99)	2001	Change
NC	71,2 (+6,9)	84,2	+13,0
WC	80,6 (+1,8)	82,7	+2,1
GT	67,5 (+9,5)	73,6	+6,1
NP	51,4 (+13,9)	59,5	+8,1
KZ	57,2 (+6,5)	62,8	+5,6
FS	52,7 (10,6)	59,0	+6,3
NW	58,3 (+6,2)	62,5	+4,2
MP	53,2 (+4,9)	46,9	-6,3
EC	49,8 (+9,6)	45,6	-4,2
'Average'*			+3,8
Calculated from Minister Asmal's statement, 27 December 2001 *Appears to have been calculated as the unweighted mean of the provincial means			

submitted by schools, were incorporated into the overall score. While a measure of quality assurance was exercised by correlating the CASS and exam marks and moderating the former to within 5% of the exam mark, it could be argued that, since the national improvement of 3,8% lies within this tolerance, it is statistically insignificant. The second reason why the overall improvement does not signify much is that it is not clear whether it was calculated as the unweighted mean of the provincial means, or whether it was calculated from the total number of candidates. This question can only be resolved once all the figures have been released, although, from the available data, it would appear that the former method was used, which gives a meaningless answer.

But the third and most important reason why the national average should not be dwelt on is that it masks very significant variations across the provinces. The obvious problem of publishing the matric results in this sort of league table is that the figures give no indication of the value added by each province. As they are we have no idea as to the significance of these raw comparisons. The following speculation is based on the assumption that all provinces operate under the same contextual conditions. This assumption may be more valid when comparing the large, predominantly rural provinces like EC, KwaZulu/Natal and Limpopo with each other than with more highly urbanised provinces like Gauteng.

In the light of these figures a question arises as to the role of the EAZ programme in Gauteng in improving the pass rate, when KwaZulu/Natal, and the Free State achieved comparable gains, while the Limpopo and particularly the Northern Cape significantly outperformed Gauteng, all seemingly without EAZs. It may be that, in allocating major resources to improving results in the poorest performing schools in the province, the middle and upper range schools were neglected, and the average improvement of 6% of all Gauteng schools was contributed largely by the weakest schools. The more questions we ask the

more we realise we need more data, and we need to analyse it at ever more detailed levels. Within provinces, for example, it would be instructive to compare categories of schools by socio-economic status and by performance. Within and between individual schools, it would be instructive to look at the differential effects of school management, teacher characteristics and instructional practices on pupil performance.

An important feature of the results for KwaZulu/Natal, Free State, Limpopo, Northern Cape and Gauteng is that their gains exceeded the margin of tolerance built into the CASS moderation, and would therefore seem to constitute significant improvements over the 2000 results. The divergence of results across provinces would indicate that any gains are due to superior performances by these provinces, rather than to the application of some or other statistical trick, which would have resulted in increases across the board. Obviously some provinces are doing better than others, and the burning question is: what is that something, and would the more poorly performing provinces benefit from the same measures?

Can our systemic theory of school reform explain the differential improvements across provinces in the 2000 matric exam (bearing in mind that, because they are not adjusted for value-added, we are not comparing apples with apples)? A plausible hypothesis, supported by Michael Fullan's speculation about the role of teacher motivation being behind the success of Britain's NLNS, would be that the mere fact of heightened expectations of schools gave principals and teachers something to aim for; something concrete, measurable and achievable. This hypothesis is certainly given strong support in the literature. Nevertheless, it would be interesting to put it to the test in the South African context: in particular it would have to explain, for example, that expectations of improved matric results were conveyed with greater urgency in the Limpopo than they were in Mpumulanga, leading to an increase in performance in the former and a decrease in the latter. This line of argument is supported by the Limpopo's claim to be the first province to institute common exams in all secondary school grades (Star, 27 December 2001), thus increasing expectations (as well as improving exam techniques) throughout the high schools. Circumstantial arguments which further support the hypothesis are that other accountability measures in the pipeline have not yet, as we elaborate below, begun to be implemented, while support measures such as improved textbook distribution, or training programmes – increasing the cognitive resources of the system - would require a longer period of implementation before they began to have an effect.

The sharp light thrown on what our children have learnt by the very end of the schooling system through our national obsession with the annual matric exam is in strong contrast to the murk which shrouds this question throughout all other grades. The good news in this regard is that the long awaited Systemic Evaluation system, which aims to sample learner performance across the country, was piloted at grade three level last year. Once this is fully in place we will have indicative data for a representative sample of schools across the country. This will be invaluable in designing intervention programmes, and immeasurably improve the monitoring of performance by province.

What little we do know at present about learning at grades 3, 6 and 9 is very disturbing, and indicates that the reason why there are so few matric passes when

compared with total enrolments in the primary school grades is because children are not learning what we expect them to learn in each of their grades, and that this effect rapidly accumulates as they fall further and further behind the level at which, for example, their textbooks are written (see Vinjevold, forthcoming, for an overview of this work).

Overall the studies indicate that learners in the majority of poor South African schools are performing well below what is expected of them by provincial and national curriculum documents (see for example, the Western Cape Education Department's Benchmarks for Literacy and Numeracy in the Foundation Phase and the recently developed draft NCS for grades Reception (R) to 9). In relation to these curriculum expectations the majority of grade 3 learners are performing at or below grade 2 numeracy and reading levels while many grade 6 learners are not able to perform mathematics and reading tasks expected at the grade 3 level. Throughout the school, low levels of reading and writing severely affect learners' capacity to progress in any academic activity, including mathematics.

When linked to the data on classroom observations and school management, the results of the assessment studies suggest that the following measures are likely to have the strongest effects on learner performance:

- focusing on clear outcome standards for each grade in literacy and numeracy. For example: "By the end of grade 2 learners should be able to add, subtract and multiply two numbers up to a minimum of 999".
- maintaining a close system of monitoring and supporting teachers in achieving these outcomes at the end of each grade

Such curriculum management should be administered at both the district and school levels, and includes:

- planning and monitoring coverage of the intended curriculum
- ensuring that books and stationery are available and used daily
- moderating regular assessment exercises and using the results to improve instruction
- focusing on the comprehension skills of the learners, particularly their ability to deal with extended reading passages and responding in writing to questions requiring a critical understanding of the passage
- weaning learners from an over-reliance on 'concrete' methods for solving arithmetic problems, which severely retards their ability to develop and utilise a flexible understanding of the number system as the foundation for all higher order problem solving skills in mathematics
- systematically training teachers to meet these requirements

Very few school development programmes currently operating in South Africa attempt to ascertain in any detail the knowledge needs of the pupils, teachers and managers in participating schools. While the intended curriculum gives a map and shows the destination of schooling, if we don't know where our children are on the map then we don't know what direction to proceed in. Consequently, intervention programmes cannot be designed around these needs, nor can they assess progress of the programme against learner performance.

Part of the problem is that the architects of such programmes often assume that probing knowledge needs does violence to the self-image of pupils and teachers, and implies a deficit model of school reform. Consequently, they are self-conscious about including accountability measures in their programmes. Certainly, the process and results of research into

the problems which give rise to the poor learning situation in so many South African schools must be handled with sensitivity and according to the highest ethical standards. However, our systemic theory of school reform predicts that omitting the use of pupil performance in designing and monitoring these interventions robs them of significant power, and ultimately does far more damage to the lives of the pupils, through lost opportunity, than any amount of testing could ever do.

Applying these monitoring mechanisms requires not only that district officials and school principals support these processes, but indeed that they put their full authority behind driving them. This is the ideal of systemic reform: institutional managers should be instrumental in identifying their own needs, formulating appropriate support measures, and monitoring progress. Under these conditions, the support and training agencies assist in achieving the policy and practice priorities of the public sector.

Financial management

Many of the provinces experienced substantial overruns on educational expenditure in 1997. Since then the Minister of Finance has not only exercised strict control over spending, but has also effected measures to shift the spending ratio of personnel to non-personnel items so as to free up more money for capital expenditure. While there is now much better financial control, many provinces are still having difficulties in spending their capital budgets (Report to Parliament by the Minster of Finance, October 2001; National Treasury, 2001). It is a great irony that in a country of such great poverty where hundreds of thousands of children are schooled under very difficult conditions, often without books, hundreds of millions of rand remain unspent every year because of management deficiencies in several departments of education (DoEs).

Organisational Development and Management

There is wide recognition of the fact that the interface between the macro-accountability mechanisms – directed from national and provincial levels - and the sites of their application – schools – is a very weak link in the schooling chain. Districts and circuits constitute this interface, and they also serve to identify and apply appropriate support measures to assist schools in meeting their accountability targets. Restructuring of districts in order to better serve these vital functions is underway in most provinces, but there is a long way to go before they are capacitated and equipped to provide effective monitoring and support services to schools.

The performance management of individuals is confined to the highest levels of the system, and there is little personal accountability for the vast majority of educators. Instituting the micro-technologies necessary for ensuring the accountability and development of professional and administrative staff on a day-to-day basis is an urgent need. Chief amongst these must be a performance management system, through which the work of individuals, teams and institutions as a whole would be planned, supported and monitored, and through which inefficiencies and development needs are identified and remedied. While it is true that the work of senior civil servants is beginning to be regulated through performance contracts, in the absence of the necessary management systems, these officials have few tools at their disposal to ensure that their subordinates, in turn, play their respective roles in

meeting performance targets. Without efficient management systems, the only means at the disposal of senior managers are the blunt instruments of threats, exhortation, cajoling, and management by 'walking around and shouting'. It is even difficult in the present climate to apply the kinds of extreme measures required in cases of criminality or gross dereliction. As a result, dealing with disciplinary cases can take many months and even years (Ministry of Education, 2001).

Pursuing our hypothesis concerning the improvements in matric results over the last two years, it may just be true that these were achieved as a direct result of the application of these blunt instruments by the Minister of Education and senior officials in the national and provincial departments. However, even if this were true the limits of such measures will be reached very soon, and the only way of hauling in the vast slack of inefficiency and corruption which bloats every corner of the enterprise of public schooling, is through a management system which ensures a better regulation and coordination of workflows, from the office of the Minister through to the classroom of the most junior teacher in the smallest school. The development and implementation of such technology must rank as the most urgent imperative facing every government department.

Three central components of the monitoring system are currently in the pipeline: the National Curriculum Statements, the Systemic Evaluation system intended to test samples of learners at grades 3, 6 and 9, and the assessment of schools by means of the proposed Whole School Evaluation process. Improving management capacity, particularly at district and school levels is key to implementing these monitoring systems effectively.

Educator development: policy and planning

In December 2000 the Minister declared the incorporation of 25 Colleges of Education into 17 Higher Education Institutions (HEIs) with effect from 31 January 2001. The ensuing incorporation process has resulted in the consolidation of teacher education in 28 HEIs and the closing of all colleges. From 2001, for the first time in South Africa's history, teacher education programmes are being offered exclusively by HEIs – universities and technikons.

Systematic supply and demand studies for teacher education have not been undertaken in South Africa, and the absence of reliable data is a hindrance to the development of a comprehensive plan – nationally and by province – for teacher development. However, a significant start was made during 2001 as part of the project facilitating the incorporation of the Colleges of Education into HEIs began the process of formulating a national plan for teacher education.

The supply/demand component of this project was undertaken by Luis Crouch (2001) and concludes that there is a looming imbalance between teacher supply and demand. According to the most likely scenario developed by Crouch, this imbalance will require the training of 30 000 new teachers each year for the next 10 years. The assumptions on which these projections are based take account of normal attrition, and deaths from AIDS-related causes. Just over 13 000 students are currently enrolled in initial teacher education programmes. It is clear then that the number of student teachers will need to be increased two or three-fold if South Africa is just to keep pace with natural and AIDS-related attrition.

TABLE 2: NUMBER OF STUDENTS IN INITIAL TEACHER PROGRAMMES IN 2001 (JET, 2001)

Province	No. of HEIs offering teacher education	Students in initial teacher programmes in 2001
Eastern Cape	6	1370**
Free State	3	1236
Gauteng	3	2793
Kwazulu Natal	4	1667
Mpumulanga	1*	301
Northern Cape	1*	243
Limpopo	2	1234
North West	2	1912
Western Cape	5	2334
Total	**28**	**13 005**

*Higher Education Institutes

**Excludes Unitra, for which no figures were available

Resolution No 7 of 1998 of the Educator Labour Relations Council (ELRC) (ELRC, 1998) establishes that teachers may be required to attend programmes for ongoing professional development, up to a maximum of 80 hours per year, and that these programmes are to be conducted outside the formal school day or during vacations. In addition, the Council voted R120 million for funding INSET, and it must be frustrating to teachers that the opportunity posed by these decisions has not yet been taken up to any significant degree.

The process for programme accreditation is complex and time-consuming, but some progress is at last being made, Thus guidelines have been issued for the delivery of the new National Professional Diploma in Education (DoE/ELRC/SACE, 2001), to be offered from 2002 and aimed at upgrading the qualifications of under-qualified teachers, and equipping them with the competencies specified by the Norms and Standards for Educators.

The discussion document Funding of Public Higher Education: a New Framework issued by the DoE, as part of the proposed new National Plan for Higher Education, proposes a new funding framework as a 'steering mechanism' to meet the goals and targets for the transformation of the higher education system. The funding framework and the planning process will be the main levers by which the goals of the new National Plan for Higher Education will be achieved. Alignment between the funding formula and national and institutional planning will occur through block grants and planned enrolments. The block grants or teaching subsidies will be paid to higher education institutions at a set rand price per FTE (fulltime equivalent) student. Four additional sources of funding are available for teacher education programmes:

- bursaries available through the ELRC for teachers applying to study the National Diploma for Professional Educators (NDPE);
- R20 million of National Student Financial Aid Scheme funds are earmarked for trainee teachers;
- skills development levies channelled through the ETDP SETA; and

- conditional grants offered to the provinces through the DoE.

The DoE is currently pulling together the above policy elements into a coherent plan for Educator Development and Support (EDS). While the funding formula of the National Plan for Higher Education will provide accountability and incentive measures for teacher education, the EDS plan will give direction for the design and delivery by the HEIs. In order to serve these purposes, the plan will need to contain guidelines on:

- projected quantitative needs of the system, by province, for at least the next five years
- the development of cost effective models for the delivery of teacher training programmes, in the light of the enormous scale of Pre-Service training (PRESET) and INSET needs
- the identification of priorities concerning types of training courses, with quantitative targets, for example:
  - Target 1: orientation for all teachers on the new curriculum
  - Target 2: management training for principals and district managers
  - Target 3: delivery of the NDPE to under-qualified teachers
  - Target 4: higher level programmes to improve knowledge and skills of all teachers
- funding mechanisms, including the incentivisation of priority courses
- accreditation arrangements

In the absence of these guidelines the HEIs are working somewhat in the dark, although the DoE is about to publish a funding framework which should clarify government's intentions considerably.

Research

Research on schooling in South Africa is not well-developed. However it is an area that presents HEIs with a new field of opportunity and is another area in which departments of education could take a leading role by commissioning research studies. There are three dimensions of concern:

- While there is significant activity at the level of policy advocacy and critique, much of this work is polemical and anecdotal, with a weak empirical base.
- Some very illuminating empirical work is being done at classroom level (see, for example, Adler forthcoming and Jacklin, 2001), but this is confined to the micro-level and it is not clear what it means for policy and practise at the level of the system.
- There is a desperate shortage of information on the shape and nature of the system as a whole, on the impact of policy, and on the relationship between micro-level classroom research and the macro-picture. Virtually every accountability and support category described in this paper requires illumination, through information, description and analysis. In particular, large-scale longitudinal studies which attempt to identify those school and classroom level variables which most affect pupil learning would serve to sharpen the design and implementation of school development programmes.

Support Measures

Development appraisal

This is being implemented in one or two provinces, but in general the initiative seems to be in limbo, and therefore represents another missed opportunity for identifying the development needs of teachers and managers, and for tracking the results of support measures.

Provision of textbooks, stationery and other cognitive resources

Progression in school learning is essentially about learning to read and write at successively higher levels of

TABLE 3: BUDGET AND EXPENDITURE ON BOOKS AND STATIONERY 1998-00 (R millions)				
Year	**Budget allocation R (millions)**	**Percent increase**	**Expenditure R (millions)**	**Expenditure as a % of budget**
1998/99	392,6	-	-	-
1999/00	794,7	102%	769,4	96,8%
2000/01	920,2	15,8%	-	-
Source: Compiled from Ministry of Education 2001				

cognitive complexity, while the different school subjects represent distinct areas of specialised knowledge and language. It follows that the quality of learning at each level crucially depends on the presence and productive use of good textbooks and other reading and writing materials.

Following the expenditure overruns in many provinces in 1997, and the strict regime demanded by the national treasury in subsequent years, spending on books and stationery plummeted from a total of around R900 million in 1995/6 to a low of about R80 million in 1997/8 (Taylor and Vinjevold, 1999). Table 3 shows that in this area, too, government is steadily improving the budget allocation for books and stationery. Expenditure also seems to have improved, although a number of provinces regularly fail to spend their book budgets.

In terms of the delivery of books to schools in time for the start of the 2001 calender, the provinces exhibited mixed fortunes, with no information available for KwaZulu/Natal, and success in the other provinces generally around the 80 – 90% levels, except for the Eastern Cape, Mpumulanga and the Limpopo, where delivery was estimated at 24%, 60% and 70% respectively (Ministry of Education, 2001). This is a continuing problem, and the pattern seems to be repeating itself in 2002 (Business Day, 17 Jan 2002).

Educator development

The state of learner performance described above supports the conclusions of classroom-based research (Taylor and Vinjevold, 1999) concerning the low levels of knowledge on the part of teachers concerning the subjects they teach. In this regard, structured reading and numeracy INSET programmes stand out as urgent priorities for teachers at the foundation and intermediate phases, as do programmes which systematically take senior phase teachers through the content of their specialised subject areas.

Much of the INSET associated with school development programmes at present is undertaken by NGOs, through short, workshop-based courses. Such courses can be effective in: providing information and orientation to new policies, inspiring and planning individual and institutional change, and developing management systems. However, this form of INSET is a very weak intervention in building the deep knowledge structures and professional ethos required for the long-term qualitative improvement of teaching and learning. The universities have largely not been involved in this kind of work, but opportunities now abound for them here, and already there are some very promising developments, with HEIs beginning to participate in some large school development programmes.

There would seem to be room for the HEI providers to offer accredited two or three year courses for school managers and teachers, directed by a focus on improving the delivery of the curriculum, by strengthening school-level management and classroom instruction. The almost exclusive focus in the past on pedagogy through INSET courses for teachers - a tendency greatly aggravated by the process-oriented Curriculum 2005 – needs to be supplemented by an approach which places centre stage the quality of the knowledge transactions which occur between teacher and pupil: this would include the subject knowledge of teachers and their pedagogical content knowledge. Coverage of the curriculum to the standard appropriate to the grade being taught, and the effective use of reading and writing activities should be integral to such programmes. Ideally, an in-school support and mentoring component would be included, contracted out to NGO and commercial service providers.

CONCLUSION

The provision of schools, teachers and other resources by the state does not guarantee opportunity to learn, or at least not opportunity of any quality. The quality of schooling is amenable to improvement by fitting these resources together optimally and leveraging higher levels of performance, through the deployment of a suite of accountability and support measures. Collectively, these measures:

- set targets in the form of performance standards
- monitor the delivery of these targets
- provide training, resources and

TABLE 4: SUMMARY OF ACCOUNTABILITY AND SUPPORT MEASURES

APPLIED BY	ACCOUNTABILITY (Demand-pull, extrinsic)	SUPPORT (Supply-push, intrinsic)
Government	Curriculum framework	
	Learner Assessment	
	School monitoring	
	HR management	
		On-site support and mentoring
		Buildings and equipment
		Books and stationery
Teacher unions and professional associations		INSET, professional development
Donors	Sources: foreign governments (bilateral) or local private sector Support to: government, HEIs, NGOs Resources for: accountability, support	
Higher Education Institutions		Professional development programmes, leadership and management, teacher knowledge. Issues: INSET/PRESET accreditation, delivery mode
	Research: micro and macro	
NGOs and commercial service companies		Professional development programmes: leadership and management, teacher knowledge. Issues: ■ workshops ■ cascade
	Research: micro and macro	
		Systems development Mentoring and other on-site support
Media	Public debate	

support to enable teachers, principals and other officials to meet the expected standards

This set of measures may be summarised as set out in the table above.

The South African schooling system is characterised by very low levels of accountability and efficiency. This results in a significant diminution in the opportunity to learn, particularly in poorer schools. Inefficiency thus exacerbates inequality. Under these conditions it is likely that small moves in the direction of improved accountability will, on their own, result in significant gains in performance. This may be the explanation for improvements in the matric results in 2000 and 2001. This form of accountability is a blunt instrument when directed from Pretoria and the provincial capitals and, on its own, its impact is likely to reach a rather low ceiling. In order to leverage further gains three additional kinds of measures will need to be implemented.

First, the monitoring of schools according to pupil performance must be devolved to the line management responsibilities of district managers and school principals. This will not be a simple task because, in effect, it means building a systematic curriculum management subsystem, through which the delivery of the curriculum is planned and monitored throughout the school. This will require benchmarking and tracking results at least at the end of each school phase (grades 3, 6 and 9). It is important to take account of the socio-economic status of schools and their parent communities in monitoring performance. Raw league tables can be very misleading, often masking gross underperformance by well-resourced schools, and heroic efforts by poor schools under difficult circumstances. Thus, while benchmarks such as the NCS provide ideal goals, specific, realistic targets need to be set for each school. School Governing Bodies can play a role in holding principals accountable for pupil performance.

Second, additional accountability measures – such as school inspections – will complement monitoring through reviews of pupil performance, and will reinforce the effects of such monitoring. The danger with all accountability mechanisms is that they too easily slip into excess. Thus, there is a fine line between necessary authority exercised in management situations and authoritarianism; and between holding teachers, schools and districts accountable for the performance of their learners and an obsession with exam techniques and results to the detriment of higher order knowledge and skills.

In the absence of accountability sub-systems, support measures are very much a hit and miss affair. Accountability measures provide motivation for, and direction to, support measures, by identifying capacity shortcomings, establishing outcome targets, and setting in place incentives and sanctions which motivate and constrain teachers and managers throughout the system to apply the lessons learned on training courses in their daily work practices. Without these, support measures are like trying to push a piece of string. With the best will in the world, it has nowhere to go.

Conversely, the performance gains achieved by accountability measures, however efficiently implemented, will reach a ceiling when the lack of leadership and technical skills on the part of managers, and curricular knowledge on the part of teachers, places a limit on improved performance. Thus, the third step in improving the quality of schooling is to provide targeted training

programmes to managers and teachers. To achieve optimal effects, these will need to connect up with, and be steered by, accountability measures.

Donor- and NGO-initiated school reform programmes have a subordinate role to play in the greater scheme of things: at best they should aim to assist national and provincial departments of education to achieve their policy priorities. At present the majority of these non-government initiatives operate in inside-out mode, concentrating mainly on support measures the impact of which are curtailed through the absence of accountability frameworks. The present analysis indicates that the integration of supply and demand mechanisms can only be effectively achieved once government officials take charge and direct the resources offered by the non-government sector, within the framework of public policy. A major factor inhibiting such coordination is the absence of the management technology required to systematically plan, implement, monitor and support this kind of activity in the public sector.

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DEPARTMENT OF EDUCATION EFFORTS TO SECURE SCHOOL EFFECTIVENESS

by Thami Mseleku
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The idea of school effectiveness embodies many elements. It is a combination of many factors and processes which, when taken together, can be said to have properly prepared a child for all aspects of adult life. This includes the social, emotional, physical and intellectual development of the individual, in order to develop the vision we hold for society.

The non-academic aspects of this process are subjective and difficult, if not impossible to measure - although we recognise the symptoms in society when they are absent. I will therefore focus on the academic terrain, and look at what schools are doing to ensure that they are at least more effective in this regard. This should not suggest that we are not working on the human and civic aspects through various programmes and projects.

In any discussion about the academic aspects of school effectiveness we should begin with an analysis of the current situation. The best measure we have, although not the only one, is the matric results, and I would like to spend a moment in looking at some key indicators from the 2001 results:

- A national pass percentage of 61.7% was achieved - an improvement of 3.8% on the pass percentage of 57,9% in 2000.
- 15,1% of the candidates passed with endorsement in 2001 as opposed to 14,0% in 2000.
- For the first time candidates could also pass their Senior Certificates with merit or distinction, a measure instituted to encourage learners to improve their performance in these examinations. A total of 31 673 candidates (11.4%) passed with merit and 6 407 (2,3%) passed with distinction.
- The number of girls in the top 20 candidates has increased and in some provinces there are more girls than boys in the top 20.

With regard to the five national subjects the pass percentages are as follows:

TABLE 1: GRADE 12 PERCENTAGE PASS RATES IN SELECTED SUBJECTS					
Year	**Accounting**	**Biology**	**Mathematics**	**Physical Science**	**English 2nd Language**
2000	HG 64,6% SG 72,7%	HG 55,3% SG 62,7%	HG 64,6% SG 42,1%	HG 65,1% SG 70,6%	HG 92,0% SG 96,6%
2001	HG 75,6% SG 87,5%	HG 58,3% SG 72,1%	HG 72,8% SG 42,7%	HG 72,4% SG 42,7%	HG 92,9% SG 96,5%

It is apparent that in almost all cases there is an improvement in the results of each subject, at both Higher and Standard Grades. The anomalous situation with Standard Grade physical science will be investigated.

In regard to institutions, which are the focus of today's discussions, the following information is worthy of consideration:

- The number of under-performing schools has decreased from 1 034 in 1999 to 559 in 2000 and to 472 in 2001.
- Pass rates have improved considerably with only 0,9% schools who achieved 0% in 2001 as compared to 1,1% in 2000.
- 6,7% of schools achieved a 100% pass rate in 2001 as compared to 4,7% in 2000.

These numbers suggest that in many cases, certainly a growing number of cases, we are getting better, and schools are improving and becoming more effective. One of the simple but dramatic benefits of better data management is that we are now able, through GIS systems, to identify the patterns of under-performing schools and districts, which have become the focus of interventions.

In relation to targets for the future, I can share these figures with you, although I must stress that they are the targets of the officials in each province responsible for curriculum matters. They are members of the National Forum for Learner Performance in grades 10 – 12, and at a workshop earlier this month it was agreed that the national strategy for 2002 to 2004 would be:

- A 70% pass rate by 2004, which means an annual increase of 3%
- A decrease in the number of schools in the below 20% category to fewer than 100 by 2004
- An increase in the number of candidates who pass with endorsement by 2% per annum.
- An increase in the number of candidates who pass with merit and endorsement by 2% per annum.
- An increase in the number of candidates who pass mathematics and physical science by 2% per annum.
- An improvement in the number of schools which achieve a 100% pass rate.

The improvement model is a simple one, and would include the following processes:

- identifying the under-performing schools or districts,
- communicating with these schools,
- analysing their results,
- developing an improvement plan in response to problems identified,
- implementing the improvement plan, and
- monitoring and reviewing progress.

This might sound trite, so let me tell you about some of the steps we have taken in regard to this model, which should

convince you that we are headed in the right direction. These steps can be grouped into three main areas::

- quality assurance mechanisms;
- improving the management and accountability systems; and
- improving the quality of human resources through accountability and support mechanisms.

QUALITY ASSURANCE EFFORTS TO IMPROVE LEARNER PERFORMANCE

In striving to improve learner performance, we should constantly problematise the commensurability of our transformation agenda (with its goals of equity, redress and democracy) and the research and public discourse on issues of quality, standards and accountability. Like education systems everywhere in the world, there is increasing pressure to achieve high quality standards at no great cost.

The wide range of quality assurance and quality management systems that we are developing must culminate in high and excellent standards of performance. It would be naïve to think that having standards and testing them rigorously will automatically lead to higher achievement, especially among our most disadvantaged learners. Having clearly set standards is a good thing. However, there are questions that we must ask: what counts as standards; who decides them; where they come from; what their purposes are; how they are used; and what counts as meeting them? These are real issues that cannot be finally answered - they remain contested.

As the Department of Education (DoE) we proceed on the premise that a standards-based reform programme is educationally sound, and our approach to quality assurance is developmental, supportive (rather than punitive) and focused on "continuous improvement". There are three related instruments which we use in this regard:

- Whole School Evaluation
- Systemic Evaluation, and
- Quality Management Systems, including examinations.

Whole School Evaluation

This is the cornerstone of our quality assurance system, with the aim of reintroducing and maintaining effective monitoring and evaluation mechanisms to ensure quality, and to promote high standards of performance across all schools in the system. The policy determines methods of judging performance using nationally agreed criteria and standardised instruments to ensure consistency across all schools over time. Bottlenecks, inefficiencies and malpractices are identified so that targeted intervention programmes can be developed. Also, good practices are highlighted and commended for dissemination to all schools.

Whole School Evaluation (now known as WSE) provides schools with an opportunity to monitor and evaluate their performance and set themselves targets for continuous quality improvement. The purpose of the evaluation is fourfold:

- to evaluate the quality of education provided by individual schools;
- to identify the key factors in schools that, if developed, will improve school effectiveness;
- to provide substantiated judgements about the overall quality of education for use by provincial and national decision-makers; and
- to raise the level of accountability throughout the education system.

In preparation for implementation, the department organised a pilot to ascertain

whether WSE was effective in enabling supervisors to reach valid conclusions about the quality of a school's educational provision, and whether the guidelines, criteria and instruments that have been developed for WSE were suitable for use in schools of different types. It was also important to discover whether the supervisors were sufficiently trained and skilled, if the principals and educators accepted WSE as a positive approach, and if other stakeholders in the school, for example the School Governing Body, accepted WSE as a support for their work. Finally we needed to know whether the organisation and structure in provinces for the supervisory units and district support services were robust enough to sustain annual cycles of WSE.

The pilot was carried out in eight provinces, and within each province up to six schools were evaluated. Evaluation teams were monitored by supervisors who have been specially trained for this function, and by members of the national and provincial departments. Some of the conclusions of the pilot were as follows:

- Supervisors have sufficient skills to carry out the process credibly. This was confirmed by the responses to questionnaires from principals and educators involved in the pilot. Departmental monitors also reported that supervisors conducted themselves professionally, were confident in their dealings with educators and showed good skills in collecting evidence.
- Educators and principals felt that WSE enables supervisors to make valid comments on their schools' performance and are agreed that WSE could help their schools improve. Key areas identified as requiring development in many of the schools are standards of attainment, leadership and management, training for educators and balance in the curriculum. In several schools principals used the evaluation and the national criteria to carry out an internal self-evaluation of the school. They found this exercise raised their awareness of the school's strengths and areas that needed attention.
- On a few occasions educators raised objections to being observed in lessons, but this has not been widespread. Indeed, on occasions, educators have come to meet the supervisors and led them to their classes. Where difficulties were encountered, the supervisors have acted sensibly and avoided confrontation.
- Without exception, community-based stakeholders supported the initiative.

Provinces are in the process of creating a unit of trained and accredited supervisors to carry out an annual cycle of WSE, with appropriate logistical and administrative support, as follows:

POST ESTABLISHMENTS FOR SUPERVISORY UNITS		
PROVINCE	**NUMBER OF SUPERVISORS**	**ADVERTISED POSTS**
Gauteng	29	100
Free State	19	8
North West	32	5
Northern Cape	11	4
Kwazulu/Natal		41

Limpopo has an established directorate but has to set up a permanent supervisory unit.
Mpumalanga is in the process of setting up the directorate and the unit.
Eastern Cape has set up the directorate and is in the process of confirming officials to the supervisory unit.
Western Cape at first declined to participate, but has since shown an interest in implementing WSE.

Systemic Evaluation

This important initiative evaluates the performance of the education system in respect of the attainment of learning outcomes at the key transitional stages viz. grades 3, 6, and 9. This is done against the backdrop of the conditions of teaching and learning, for purposes of informing interventions that will improve the quality of education. Systemic Evaluation makes use of standardised data collection instruments that have been developed on the basis of 26 indicators of quality education that have been selected and agreed upon through stakeholder consultative forums. Systemic Evaluation will be a means of measuring the extent to which the performance of our learners is improving over time and will isolate those critical factors that promote (or impede) high levels of achievement.

Systemic Evaluation is designed as a two-component evaluation model. The first is a set of learner assessment tasks developed to assess achievement of certain learning outcomes at the end of each phase. The second component surveys the views, opinions and attitudes of parents, district officials, learners and teachers towards the provision of the education service.

Baseline Data Survey

A survey involving 57 000 grade 3 learners, in a sample of 1 453 schools nation-wide (5% of the total number of schools with grade 3), was conducted in 2001. In keeping with the principles of inclusive education, 53 of the schools involved cater for learners with special educational needs. The findings of this study will be disseminated in a national report card, which will inform intervention strategies so that effective teaching and learning can be promoted in our schools.

Quality Management Systems

The DoE has recently established the Quality Management Systems Unit, with the responsibility of ensuring that schools receive proper and meaningful feedback from both Systemic and Whole School Evaluation reports. At the moment there is a strong perception that services are not filtering down to the schools and that the district office is the weak link in the chain of service delivery. The aim of the Quality Management System is to establish a service delivery monitoring system, based on explicit service delivery standards, and using criteria articulated in the Whole School Evaluation Policy Framework.

Quality Management Systems will also promote management practices such as setting output targets and work plans; organising work teams with adequate capacity and resources; and measuring and recording all operational costs and outputs per activity. These practices are critical for improving the performance and efficiency of schools and districts.

IMPROVING THE MANAGEMENT AND ACCOUNTABILITY SYSTEMS

In the early years after 1994 the emphasis was on support systems and not on punitive processes. However, a system which offers support and no form of punitive action, even when there is clear wrongdoing by officials, will lead to continued abuses. Various studies confirm that there is widespread abuse of power in the system. We cannot ignore rape statistics of children by teachers, or the continued use of corporal punishment in violation of the law. Equally we cannot ignore the continued existence of school environments where crime, violence, substance abuse and other forms of anti-social behaviour are tolerated. Schools have to be safe environments where all

forms of antisocial and illegal behaviour have no place.

There has been progress in this regard on two fronts. Firstly, and most visibly, the department and the public are increasingly intolerant of antisocial and illegal behaviour by educators and particularly principals. All the provinces have seen disciplinary action taken against educators and school managers who have violated their positions of trust. This has led to a spate of suspensions, sackings, fines and transfers of personnel. The pace of such actions will increase. The leadership of the national minister and other political office bearers in visiting schools on the first day of the year and showing intolerance at poor school management and leadership has sent clear signals to the system.

Secondly, and less visibly, but with potentially much more impact, is the developmental campaign to make schools functional and ultimately effective. There is a correlation between schools where anti-social behaviour is tolerated and low levels of time on task, poor management, high levels of absenteeism and other unprofessional behaviour. Equally, schools which exhibit such features and then improve their management tend to see a dramatic fall off in anti-social behaviour. The last few years have seen the development of a number of projects, including the Quality Learning Programme (QLP), and the District Development Support Programme (DDSP), both of which focus on school management. The difference between a failing school and a successful school is almost invariably an effective, inclusive school management team supported by a purposeful, democratic School Governing Body. While it is important to focus on school management and governance there is also increasing evidence that without the support of a strong, well-managed district office, good practice is confined to individual schools. To improve results and the quality of teaching and learning across a large number of schools the district office has to play a key role, both in supplying support and insisting on accountability.

It is instructive to look at one of the most successful and most improved provinces in education, the Northern Cape, to see how the role of the district and the need for a combined support and accountability approach works. The Northern Cape has both support and accountability measures in place to a greater extent than probably any other province, and has the planning and management technology at district level to manage this. It also has a higher percentage of Section 21 schools than any other province, not because it is particularly formerly advantaged, although elements of this must be factored in, but more because the Head of Department took the opposite line to most provincial heads and pushed schools to take on the responsibility. This put immense pressure on the schools, which in turn put pressure on the districts. Fortunately they had been prepared for such pressure, and have been able to respond, while in turn putting pressure on the provincial department to improve its delivery.

The transformation of the school system in the Northern Cape has also involved a real collaboration between the department and its social partners. The Northern Cape DoE has made clear to NGOs exactly what it wants, and has rejected some NGOs which were not prepared to toe the policy line of the province. It has also rejected materials for use in the schools until they are accepted by the provincial officials. This has ensured high-quality delivery, a focus on quality and an awareness on the need for NGOs to work to the departmental agenda. This

creates a single-minded delivery process, and the results are becoming evident.

In addition, the province has followed a tough policy on antisocial behaviour by employees. This has led to difficult discussions between the Head of Department and the unions, but in the end the departmental line on this has won the day and as a result we can see the two prongs working here: support and accountability.

In all these activities it is clear that the role of the principal has to be supported and enhanced. Various projects are aimed at making sure all principal and management posts are filled, that managers are trained, that training and support is available for rural and farm school management, that schools are safe, that they have HIV/AIDS policies in place, and that all managers know what policies and records need to be kept.

At the same time principals who do not deliver are increasingly being identified and charged with misconduct. In the last week a Soweto principal was charged after the family of a primary school learner took him to court for using corporal punishment. Educators from all over the country will be watching this case closely, and such cases will help set precedents and persuade teachers to change their ways. This case is unusual in that the learner is not claiming injury, as has been the case in other prosecutions of educators, but the charge is based purely on the illegality of using corporal punishment. It is an important moment in the development of our democracy and in the movement towards more participatory schooling when parents feel empowered to make use of the laws that the education system has created to regulate its own excesses.

Provinces where principals are encouraged to take disciplinary cases forward, where lines of communication and responsibility are clear, where principals are given district office support which makes them feel confident in running their schools, and are assisted in setting up management and governance structures, are provinces where schools tend to do better. The obverse is even more obvious: where principals are left to their own devices, where absenteeism, alcoholism and moonlighting are tolerated are provinces where schools do not do well. Part of this, it would seem, is because the levels of accountability are so low and support so limited that the principals have no framework to relate to. Once principals act like this then learners and teachers emulate the behaviour and the culture of learning collapses.

The challenge for the future will be in the field of capacitating education district offices to be more accountable and to manage and co-ordinate accountability measures at school level, while keeping and enhancing the focus on support.

IMPROVING THE QUALITY OF HUMAN RESOURCES IN EDUCATION

In regard to the teachers it has been said that "While learning has many ends, teaching has only one: to enable or cause learning". Learners are the focus of the public education system, and in the interest of learners, appropriate levels of competence must be ensured throughout the teaching service, and measures taken to provide educators with the most effective means of understanding, reflecting upon and improving their own teaching practice.

Of all the factors that are important to productive schools nothing is as important as what individual teachers believe, know

and do. That is why teacher effectiveness is the key to improving learner performance and enhancing the productivity of schools. To improve learner performance, we must ensure that we improve the performance of our educators to the desired level, and put in place mechanisms to ensure these levels are maintained.

Teacher development

A national framework for teacher education is in preparation and is due out soon. The framework deals with both initial teacher education and in-service development (INSET), with a number of new approaches and new programmes in the offing. The framework also focuses on the utilisation of the 80 hours of INSET to ensure the system gains maximally from this important agreement with the unions.

Teacher accountability

One of the deficiencies that the current education system inherited from the previous one is the lack of an effective performance management system. This has resulted in the performance of teachers not being appraised, cases of unacceptable performance and cases of need for development not being identified and teachers not being given recognition for outstanding performance. A performance management system is essential for the improvement of the performance of educators, but the development of a system that has the support of all parties is a complicated and protracted process.

Performance evaluation supports and recognizes individual achievement and provides directions for teacher development. Teacher development is an ongoing process which takes account of the teacher as a professional, as a member of the school team working within the framework of the school plan, and as a valued professional within the public education system.

A performance evaluation scheme addresses both the accountability of educators (which is summative in nature) and educator development (which is a formative process) by doing two things:

- ensuring that all educators engage in evaluation processes designed to improve the quality of their work, and to focus their work on the objectives of the school plan; and
- assisting the educator whose efficiency is causing concern.

The development and implementation of the Developmental Appraisal System (DAS) was a major achievement and was the result of several years of working together by all parties in education. Its implementation unfortunately coincided with several other major projects such as the rationalisation and re-deployment process and the introduction of Curriculum 2005. As a result, the implementation was not as successful as one would have wanted it to be. However, the importance of DAS is still being realised and acknowledged and the proper functioning of it still being pursued. An impression exists among some people that DAS has failed, but this is not true. In some provinces and in many schools the implementation of DAS is being vigorously pursued with varying degrees of success. In some provinces, like the Northern Cape for instance, the implementation has been pursued to its fullest extent, while some other provinces still concentrate on the training of officials in the implementation of the system.

The degree of success with which the system has been implemented in schools has largely been determined by the level of dedication of the principals. The schools where strong leadership has

ensured that DAS is fully implemented are already reaping the benefits of the system, while others will soon have to follow suit in order to avoid being acted against. The department has no intention of getting rid of DAS.

Another important facet of the performance management of teachers is the identification and addressing of poor work performance. The Employment of Educators Act was amended in 2000 to provide for a code and procedures to deal with this matter. This requires the parties to the ELRC to agree to performance standards with which educators must comply. A task team of the ELRC, with an independent facilitator, has been appointed to deal with this matter. Draft documentation has already been prepared and an agreement will hopefully be reached soon. The immediate next step will be to develop an appraisal instrument to identify cases of incapacity and of need for development. The Act provides for a procedure whereby cases of incapacity will first be addressed by means of development. However, if that fails to resolve the problem within a reasonable period, provision exists for disciplinary steps to be taken.

Appraising educators for purposes of development and for purposes of identifying and addressing poor work performance will form part of a comprehensive performance management system that must still be developed. This comprehensive performance management system will eventually also make provision for the appraisal of educators for purposes of rewards. It is anticipated that by the end of this year the full system will be in place and ready for implementation.

In considering the system for evaluating educators, there are several assumptions that must be understood. First, it is assumed that the evaluation process will be continuous and constructive, serving to improve educators' effectiveness and to foster quality teaching. Second, evaluation should help educators reach their full potential as educators and highlight areas for professional growth. Third, evaluation must be based upon clear performance standards and the co-operation of both educator and management team.

The performance management system acknowledges teachers' rights and abilities to shape their own professional development, yet requires that they channel their professional development efforts to support school and system goals. It cultivates a climate of openness, collegiality, and experimentation by encouraging teachers to use each other as resources for content and educational knowledge so that they can improve their individual and collaborative practices. Yet it deals with unsatisfactory teaching in ways that are clear, supportive, and decisive.

The South African Council for Educators (SACE) also has an important role to play in the professional development and conduct of educators. SACE has been slow in establishing itself as a fully functioning professional body for educators but is now taking on its tasks. SACE has a dual role regarding the effectiveness of educators. On the one hand they have a professional development responsibility; on the other, a disciplining responsibility. SACE is required by law to promote and maintain the image of the teaching profession by engaging in continuous professional development activities such as quality assurance in collaboration with the ETDP SETA and the promotion and maintenance of professional ethics.

A final element which I must mention is the development of a new salary and grading structure for educators, which is in the final stages of negotiation with unions. This structure will provide for different career paths, either in management or in teaching and learning, each of which will allow for a greater degree of specialisation in the chosen area. In addition, we have recommended the creation of a new post of Senior Education Specialist (SES), a post dedicated to improving quality, with the SES being based at one school, but responsible for improving the quality of teaching in a number of surrounding schools as well. These are exciting developments which should boost the morale of teachers.

In conclusion, I would argue that schools are indeed becoming more effective, as the system becomes more effective. We have a long way to go, and would like to ensure that our efforts are directed at the right targets in future: These include the development of our teachers and administrators, getting all systems up and running, and putting ourselves in the position where we can properly use the funds available to government for social development purposes.

FOCUS ON ACCOUNTABILITY MECHANISMS

by Dave Balt
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NAPTOSA

INTRODUCTION

The development and improvement of schools and, by implication, the quality of education, is probably the single most important investment that South Africa can make. The issue is not so much about what it is that has to be done, but rather how it should be done in order to get the best results and in the context of the crucial role that accountability has to play.

NAPTOSA believes that, in order to develop a coherent, workable plan, it is essential to take into account:

- firstly, the constraints that will affect implementation and delivery, namely, limited funding and limited human resources;
- secondly, the scope of current policies and initiatives so that whatever follows should build on what has already been done, without having to start from the very beginning.

NAPTOSA's view is that accountability in education implies much more than the responsibility of the teachers in the system. Accountability requires all stakeholders to give account by proving, by their attitude and deeds, that they are performing their tasks well, accepting their responsibilities fully, and are willing to stand up and answer to all the interested partners in education.

It is thus a matter of co-responsibility and of inter-dependence. Accountability requires that:

- the teacher must give account to parents, learners, the community and the employer;
- the State must give account to the parents, taxpayers, learners and teachers;
- the learner must give account to parents, teachers, the community, the State, the taxpayer.

NAPTOSA's opinion is that it is unfair to expect teachers to account for what is wrong in schools if the provincial departments, many parents, thousands of learners and other parties who should accept joint accountability do not have to answer the same question. We do, however, agree that the teacher is the leading role player in what is achieved in schools and that he/she is accountable:

- to the child, who trusts him/her to provide the truth and direction;

- to the parents, who sacrifice much to enable their children to attend school;
- to the profession, which cannot afford misbehaviour to damage the status and image of a noble profession.

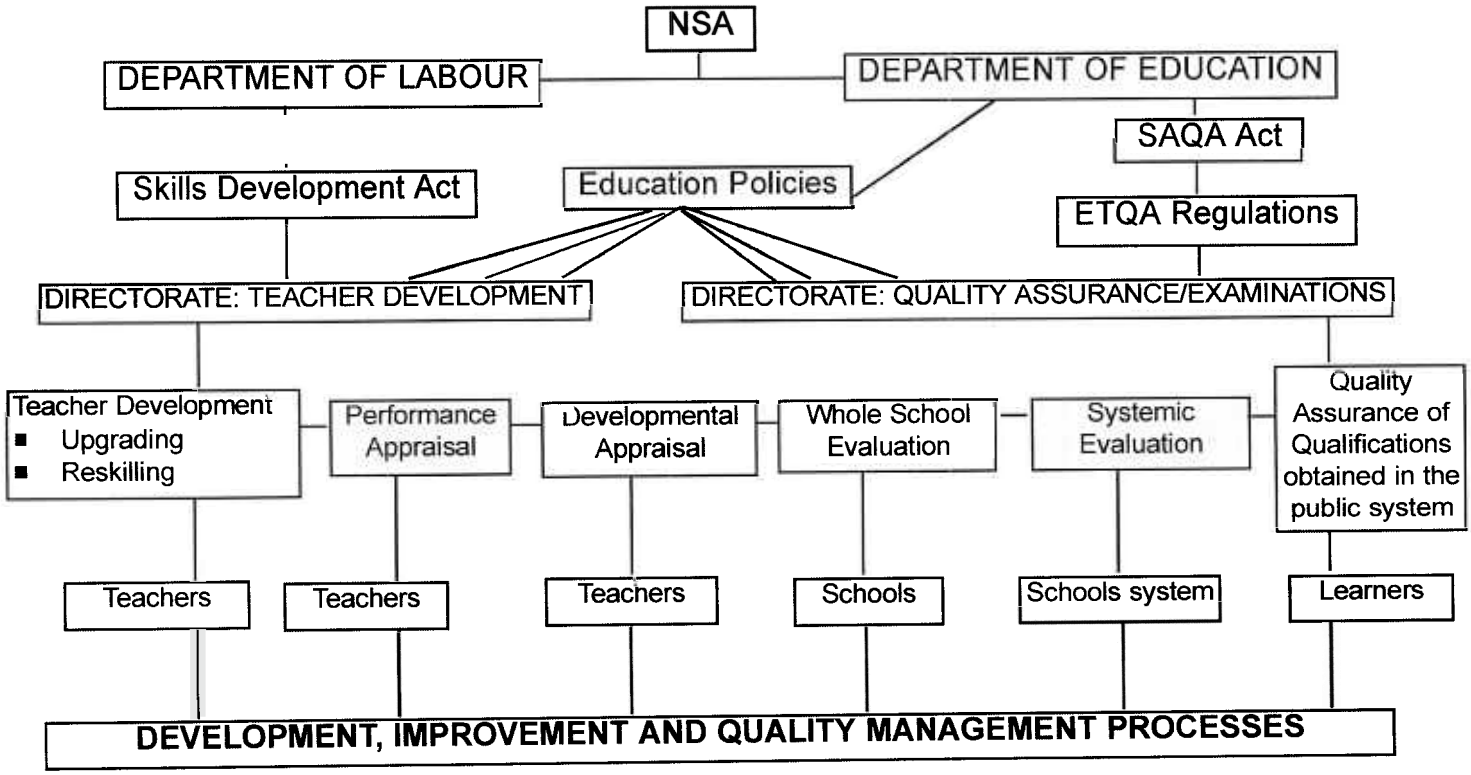
We also believes that there are fundamental premises, which should underpin whatever decisions are taken.

These include:

- The limited human resources should be deployed and budgets should be used in such a way that there is maximum benefit in respect of cost-effectiveness, productivity, and results.
- In order to achieve this, there will have to be far greater responsibility and accountability devolved to local level, that is, to the level of the learning site and individual teacher.
- Measurement of progress must be done against targets and time frames set at the appropriate levels.
- Development and improvement initiatives cannot be implemented as totally separate projects. There are simply not enough people to deal with each project or initiative or policy separately.
- Whatever plans are eventually decided upon must be introduced incrementally. All schools should be introduced to the basics at the same time, and when schools and staff are sufficiently confident about the first step, the next step should be introduced. This will ensure greater involvement from the very beginning and by focussing on developing the necessary capacity, such initiatives stand a better chance of becoming sustainable, or even self-sustaining, in the long term.
- The plans, criteria, and policies, should be flexible so that improvements can be made continually during the process of implementation. This will be particularly important in the initial

FIGURE 1: SCOPE OF DEVELOPMENT AND SCHOOL IMPROVEMENT INITIATIVES

Integrating Whole School Evaluation, Developmental Appraisal System and Systemic Evaluation



stages, not only to improve the process but also to enable greater participation and understanding and to facilitate greater "buy-in" to the process.

In South Africa, we tend to develop good policies, but we equally tend to fall down on the implementation. The assumption cannot be made that policies, projects or initiatives will automatically succeed simply because the intention is good and there are obvious benefits to be derived. People make policies work and the tasks that people are expected to deliver on must, at least, be achievable in our specific circumstances. The Developmental Appraisal System (DAS) is a prime example of a good policy that isn't working.

EXISTING POLICIES AND INITIATIVES

The first step in finding a coherent workable plan is to assess what is already out there and, where possible, to scope the relationships between such policies/projects so as to determine how the different policies could be used to inform one another. The perspective that we are taking is that of departmental initiatives and policies, on the assumption that any projects from outside of the department would be designed to support this range of initiatives.

Clearly, all of these, from the upgrading of qualifications for teachers, to re-skilling, developmental appraisal, whole school and systemic evaluations as well as monitoring learner performance (as reflected in the exam results) have the potential to make significant contributions to the improvement of the quality of education that is delivered in schools. These could be arranged differently but the important points that need to be noted are the following:

- The Skills Development Act (SDA) of the Department of Labour has implications for teacher development.
- Although the SDA requires that the employer appoints a Skills Development Facilitator to develop a workplace skills plan which can be used to leverage funds for skills development, it is not clear whether provincial departments have appointed Skills Development Facilitators, or whether Workplace Skills Plans have been developed. If such plans have been developed, it is not clear whether these are based on needs in schools.
- A complication is that, since the department does not contribute levies to the ETDP SETA, only a budget entry, there are no funds to be disbursed and it is not clear how the spending of the budget entry will be monitored to ensure that it is, indeed, spent on skills development. It is also not clear who is responsible and accountable for using this money.
- Whilst developmental appraisal (DA) stands to benefit teachers and, by implication, schools and learners, it is not being implemented. This is partly due to scepticism regarding the motives and the process. It is also due to the fact that it is a time-consuming process, which requires a huge investment of human resources. There is simply no time to do DA for every teacher!
- Although performance appraisal (PA) is not yet agreed to, it would appear that something along such lines will be needed and is likely to be implemented. Teachers obviously stand to benefit. If performance improves, so will the quality of education. However, while the purpose is clearly different, how would the process be significantly different from the DAS?
- The policies for Whole School

Evaluation (WSE), as we all know, have been approved and the process is being trialled. However, the process at present focuses mainly on acquiring evidence of school performance as a kind of benchmarking exercise and not on finding strategies for providing appropriate and ongoing support where it is needed. It is also a hugely time-consuming process that requires a large human resource investment. It has been calculated that, with the present number of supervisors, the cycle will take about 15 years. Clearly, WSE applied in this way will not be ongoing and is unlikely to achieve what it sets out to achieve.

- In addition, an important component of WSE is the observation of teachers in the classroom. Whilst individual teachers will not be appraised as such, other than in the context of effectiveness of teaching in the school, it does potentially mean that teachers could be appraised for PA, DAS and WSE, and under-qualified teachers for the recognition of prior learning (RPL) in order for them to upgrade their qualifications. NAPTOSA believes that we lack the human resources to do all of these separately, that there is significant overlapping and that such duplication can be avoided.
- Systemic Evaluation policies are in the process of being trialled and finalised. At present there is tremendous emphasis on measuring Learner Attainment at grades 3, 6 and 9 as an indicator of the "health" of the system. Whilst we concur with this, it is not enough to focus on indicators at the end-user level.
- Clearly, Systemic Evaluation should, in some depth and detail, evaluate every aspect of the system as a whole: the efficiency of, and support from, district/circuit level up to the national office. Without this perspective it will not be possible to target specific aspects of delivery for appropriate interventions.
- Obviously exam results are also indicative of the quality of education and should be part of improvement plans for schools and FETIs (Further Education and Training Institutions), especially as there will be NQF-registered qualifications at exit points at grades 9 (NQF Level 1) and 12 (NQF Level 4) for schools as well as for NQF Levels 2 and 3 in technical colleges.
- However, in terms of the General and Further Education and Training Qualifications Authority (GENFETQA) Act the GENFETQA is "deemed" to be established and accredited without having to meet the same criteria as other ETQAs (except the Council for Higher Education) and, as such, it cannot be dis-accredited if it fails to deliver. Also, provincial departments are accredited by the GENFETQA Council as providers and it is they that must meet "provider" requirements. However, there are no requirements or criteria in respect of provincial responsibilities regarding quality assurance of learning sites (schools and colleges).
- Looking across the components of this exercise, it is also clear that three separate directorates are involved in ensuring accountability and quality in schools: Teacher Development, Quality Assurance (which actually deals with WSE and Systemic Evaluation, but not with quality assurance for qualifications in terms of SAQA and ETQA requirements) and Examinations. The links between these are obvious, but the coherence in planning is not.

The bottom line is that there are essentially good policies and programmes that can make a significant difference, but which are unlikely to succeed because of

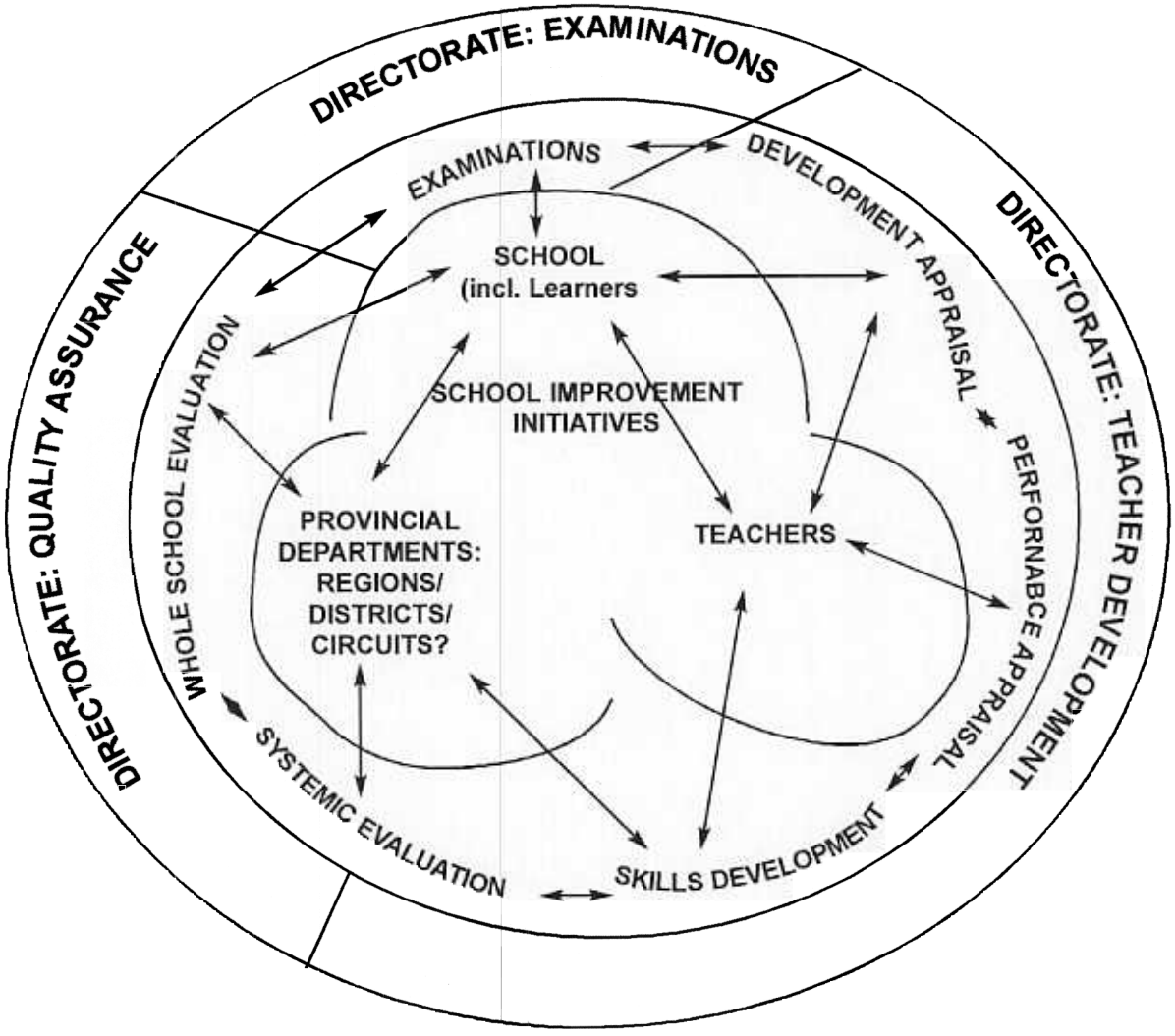
the implementation problems detailed above

A HOLISTIC PERSPECTIVE ON DEVELOPMENT AND IMPROVEMENT POLICIES

The same information, as in Figure 1, presented differently shows that there are relationships between the various policies and that a coherent plan should be possible.

In this illustration, the different school improvement initiatives that target teachers, (DAS, PA and Skills Development) and those which target schools (WSE and Learner Performance in Examinations), as well as those which target the system more broadly (Systemic Evaluation with its focus on monitoring learner achievement) are conceptualised more holistically.

FIGURE 2
Overlaps and relationships between present policies and initiatives with little coherence in the implementation plans



NAPTOSA believes that, for example, there would be advantages if the process of DAS focused on the development of reflexive competence and self-evaluation. The process would be less threatening, would involve fewer people, would be less lengthy and would, in the end, be more empowering and therefore more sustainable.

Information obtained from developmental self-appraisal (i.e. meeting of targets for improvement set by individual teachers for themselves) could inform performance appraisal (and would definitely inform workplace skills plans for upgrading and re-skilling and therefore for skills development.

Elements of these would also inform whole school evaluation which, NAPTOSA believes, should also initially focus on self-evaluation.

Whilst the purpose and criteria used for the different evaluations would be different, the processes could be linked and information from one process could inform the others. Information obtained from learner performance in examinations could inform DAS and WSE, as could the monitoring of learner achievement (MLA) processes in grades 3, 6 and 9. These could also be linked to skills development opportunities. Structured correctly, information from DAS and WSE could prove very useful for evaluating the efficiency of various parts of the system and for developing target-specific interventions within the system.

A requirement would be strong communication links between the three directorates concerned as well as joint responsibility for improvement initiatives. Clearly, these at present disparate and separate components could together constitute a coherent quality management system, the details of which are not addressed in this paper. The point is simply being made that there should be coherence and that coherence is possible.

ACCOUNTABILITY IN A COHERENT QUALITY MANAGEMENT SYSTEM

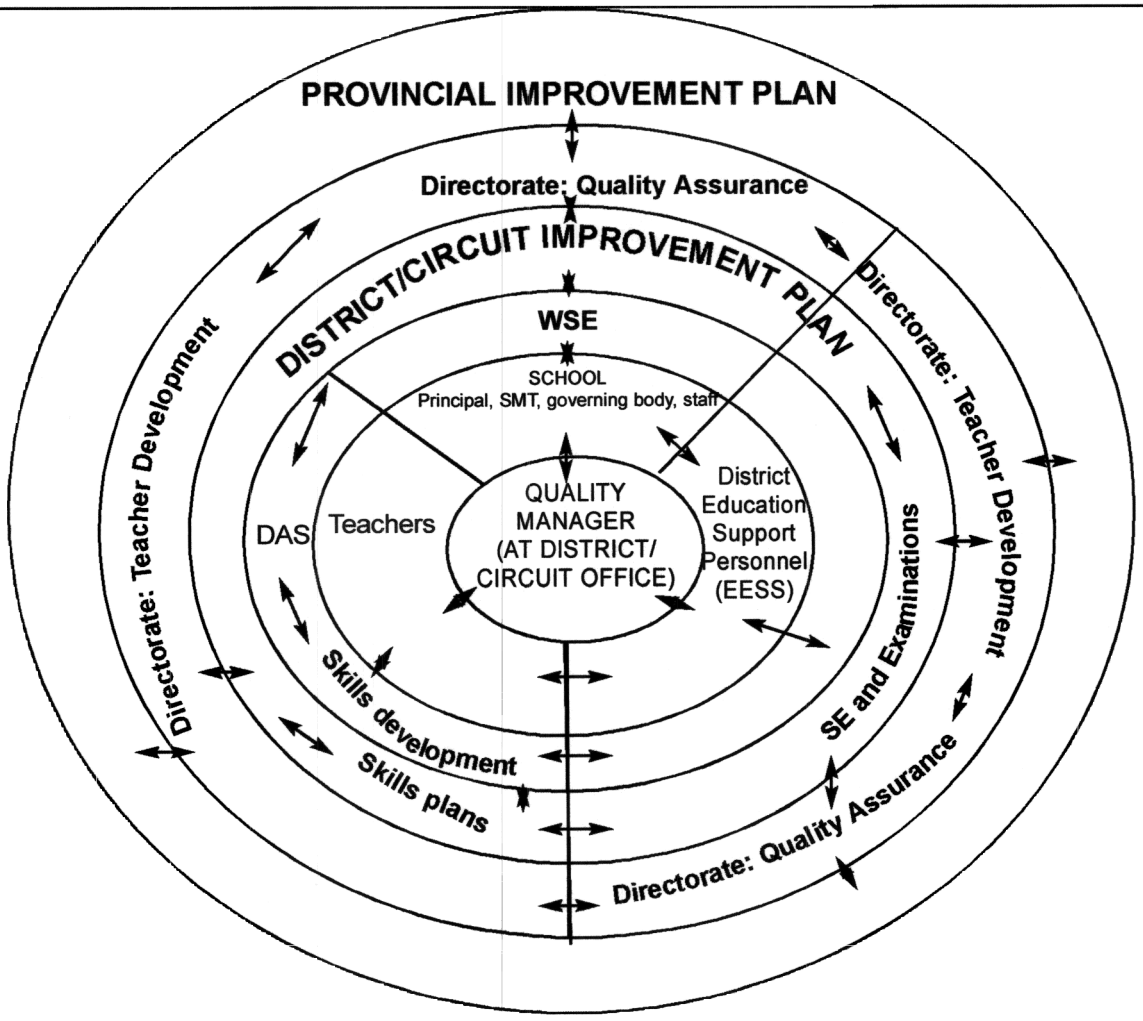
NAPTOSA does not believe that each of the separate initiatives or policies, each with their own "lines" of accountability and housed in separate directorates, are likely in their present form to result in the changes and improvements that are envisaged. There has to be coherence in order to ensure that the limited human resources are deployed as effectively as possible and so that each of the initiatives support and enrich the others.

The start towards finding coherence in implementation, NAPTOSA believes, is that at district or even circuit level one person must be responsible for coordinating and managing all the elements of a coherent quality management system. By this, we are not implying that it is only this person that is accountable - what we are saying is that inclusion of such a person/new post will be critical for coherent coordination.

The illustration therefore places the quality manager or coordinator in the centre. If the quality manager/coordinator is located in a district office then, clearly, accountability will also have to be to the District Head and to district office personnel. Coordination, as already stated elsewhere, would have to focus on:

- developing reflexive self-evaluation and competence among teachers in terms of DAS and PA as well as WSE;
- assisting schools with self-evaluation in terms of WSE;
- working with "circuit inspectors and subject advisors" and coordinating the

FIGURE 3
Accountability within a coherent school improvement and quality management system



strategic deployment of personnel for maximum benefit.

NAPTOSA does not believe that the quality management/coordination function can be "added on" to the job description of existing district/circuit office personnel, This is in part because old habits die hard and it is difficult to "add on" another new component to a job when it is introduced alongside existing responsibilities. However, we believe that the primary reasons for establishing a new post at district/circuit offices would be:

- The quality management/coordinating function would be a full-time exercise with little or no time for anything else. It would therefore be essential to appoint a person to whom this dedicated and focused task can be assigned.
- The tasks that will have to be performed are likely to be time-consuming.
- The attention of the coordinator should not be distracted.
- Quality management, especially in a coordinated way, is really the only way of ensuring that change does take place and that there is improvement and that the process is sustainable.

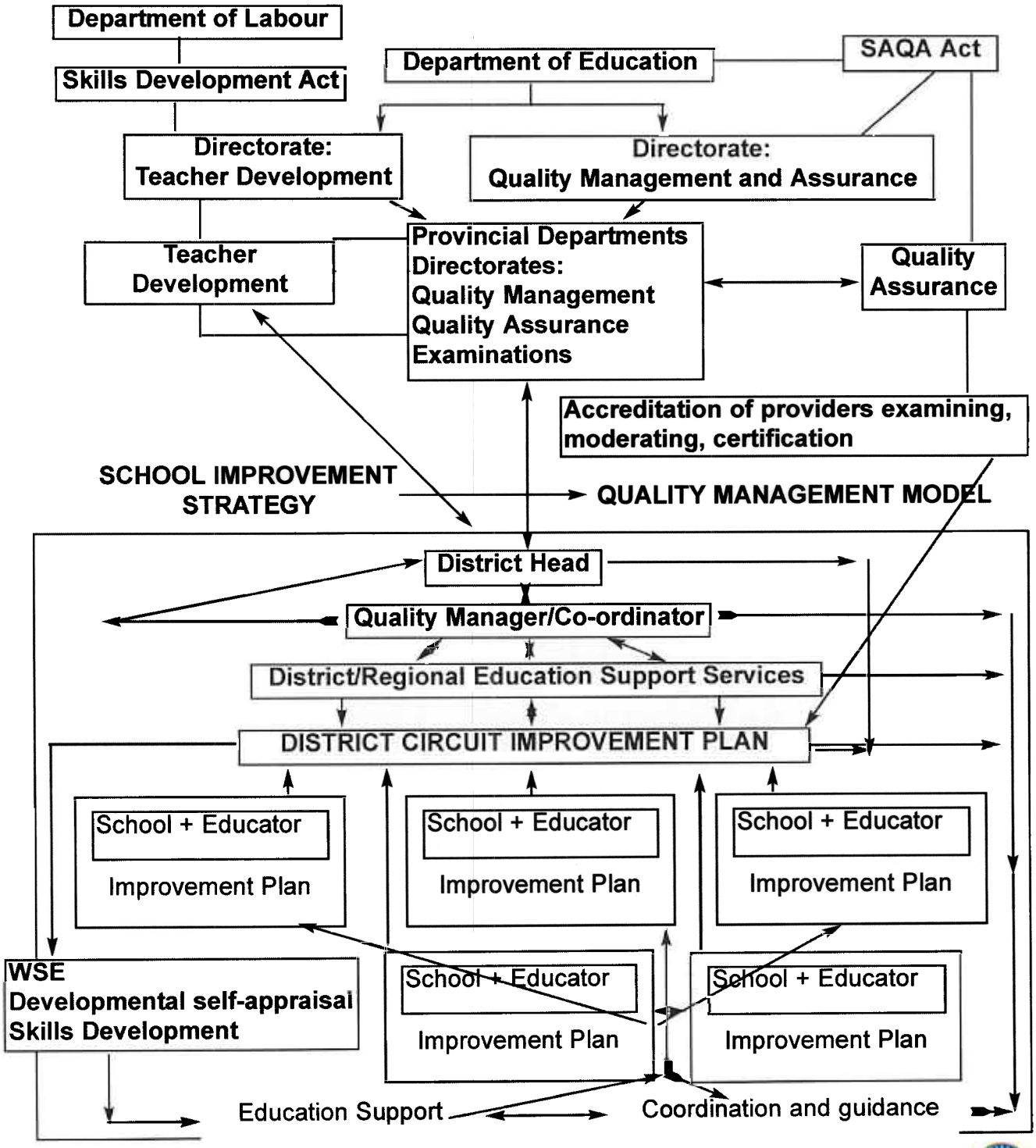
A COHERENT PROCESS

The following flow diagram is one way of illustrating the processes involved in a coherent school improvement, development, and quality management strategy.

Perhaps it would be useful to go through a few points.

- The quality manager/coordinator would have to be familiar with all the policies and criteria concerned.
- The first step would be to inform and work with teachers in a school to develop the competence to do self-

FIGURE 4
COHERENT PROCESS



evaluations in terms of the DAS and in the process to set their own targets and time frames for improvement as well as identifying their skills development needs and where they need support.

- PA should then take place in the context of the targets, time frames and needs.
- Teachers, with SMTs, principals, (and school governing bodies) should then develop School Improvement Plans based on the plans and targets set by teachers in the school.
- The coordinator therefore deploys limited human resources with greater effect, reports to schools/teachers in an ongoing way in the context provided by school and personal improvement plans and, together with those involved, evaluates progress, decides on interventions, provides support and sets new targets.
- The process is ongoing and does not require the involvement of personnel from outside of the district except in instances involving the Directorate for Examinations.
- District office personnel are involved in developing the district improvement plan and are therefore au fait with what needs to be done.

In this model everyone is accountable to everyone else – upwards, downwards and laterally – and the external evaluations, using agreed upon criteria or measuring instruments, are a mechanism for confirming progress, or otherwise.

ADVANTAGES

NAPTOSA is of the opinion that, by coordinating efforts around school improvement and quality management, the advantages are as follows:

- Duplication and overlap is minimised.
- Limited human resources can be deployed more effectively.
- The process will be ongoing, with support and development a key feature.
- The fundamental principles of participation, involvement and ownership are likely to result in a greater "buy-in".
- Everyone is accountable in terms of the targets they set for themselves.
- All the directorates that are involved work through a single person, their coordinator, which makes the processes coherent and simple.
- External evaluations can be cyclical, without degenerating into "inspections" at regular intervals with little follow up in between.
- Different aspects of quality improvement and management inform one another.
- All schools are involved from the start, as are all teachers, but with different targets and expectations.
- Targets are likely to be achievable and realistic because they are context specific, and successes can be acknowledged immediately.
- Evaluations, especially for teachers, are non-threatening.
- Done properly, schools should see an immediate improvement in the support that they receive.

CONCLUSION

NAPTOSA does not believe that implementation of separate quality assurance and accountability strategies, using different people to whom the specific task is assigned, in addition to an existing workload, can succeed. NAPTOSA believes that all of these plans should be seen as different elements of a holistic quality improvement and management strategy and that they must be delivered in the context of a coherent plan.

IMPROVING PUBLIC SCHOOLING IN SOUTH AFRICA:
FOCUS ON ACCOUNTABILITY

by Marna Jordaan
Suid Afrikaanse Onderwysers Unie (SAOU)

INTRODUCTION

As leading role players with regards to what is achieved in schools, educators are, or should be, accountable. However unless all stakeholders become accountable, reform of the system will not lead to improvement. Accountability comes down to the individual. A crucial element is the degree to which each individual must accept this in the best interest of the learner.

Educators are accountable to learners and through them to their parents. Learner organisations have an important role in promoting accountability by learners. They should encourage learners to be accountable by attending school, doing homework etc. and thus ensuring the creation of functional institutions. Officials, at district, provincial and national level, upon whom educators, parents and learners rely to give direction are also accountable. It is essential that accountability mechanisms be put in place for learner organisations, governance structures and Department of Education officials, as well as for teachers. Crucial dynamic elements of accountability are: mutual trust, understanding and mutual respect.

Educators and officials need jointly to accept professional responsibility. To achieve this, good relations are essential. Teacher unions can play a major role in creating a climate of co-operation. They can empower educators in schools and involve them more when decisions are made.

This paper is not meant to be seen as criticism of any particular group. It is a sincere attempt to establish possible measures that can be developed in order to implement accountability mechanisms which might improve our system.

EXISTING POLICIES AND INITIATIVES

To find a workable plan towards improvement, we need to assess what is already there, and at the same time acknowledge that unanimity will not necessarily be found.

Good policies and programmes are in place. However, the implementation of them leaves a lot to be desired. This is mainly due to lack of information, insufficient training and unfriendly time frames. Accountability measures require clear outcomes and direction, which are both lacking at present. Implementing policies without knowing what the outcome is supposed to be and in the

absence of clear guidelines, often accompanied by lack of efficient training, creates a perception that "nobody cares". This can have a serious impact on performance. The attitude of educators could easily become : "if I don't believe in the 'product' why shall I 'sell' it to the client (learner)?". Nothing good can come from this. This can be illustrated by two examples drawn from current policy.

MONITORING PUPIL PERFORMANCE

Grade 12 Assessment

The only monitoring system in place at present is the matric exam, and we rely heavily on the results as a measure of accountability. The union (SAOU) supports efforts to improve results and is encouraged by recent improvements. Is an improved pass rate enough to suggest evidence of a successful system? I doubt it.

The build up to the 2001 exams clearly illustrates the problems in the execution of policy:

Although continuous assessment (CASS) and exam marks were correlated and moderated, reservations exist with regard to the significance of the level of school-based assessment (particularly portfolios). Those reservations are based upon the following:

- lack of training and scepticism about the quality of it;
- unfriendly time frames;
- restructuring of districts;
- dysfunctional clusters;
- lack of commitment and management at institutional level;
- lack of capacity at district level;
- recording of assessment.

The task of implementing continuous assessment was made more difficulty by changes which were announced late, late receipt of guidelines, added workloads and preliminary examinations at the worst possible time. After going through this educators are confronted with thoughtless remarks at the end of the year that "portfolio marks will not count". Can you blame them if they lose faith in the credibility of the system?

Teacher morale is at its lowest. Motivating teachers has become increasingly difficult. Those for whom education is a vocation find it difficult to relate to a system in which they have lost faith. This does not stem from a resistance to transformation or acceptance of change, but purely out of frustration. Teachers accept the need to change and are prepared to be accountable, but expect to receive professional directives.

Accountability measures should give direction, set performance standards and monitor outcomes. At present performance is expected, but without direction or clearly defined outcomes, achievement of the desired results is highly unlikely. There is no sense in casting blame upon one another. In some institutions managers and educators bent over backwards to implement the policy as expected, while others simply ignored it. More efficient monitoring systems must be put in place to ensure that all educators comply with policy. Institutional managers supported by district officials must be more involved in ensuring policy compliance and in monitoring the implementation of important policy initiatives. The fact is, there are educators who need to take up their responsibilities and be prepared to be accountable to learners, parents and the community, as well as their employer. On the other hand, the administration and implementation of policies in the system must also improve.

Grade 9 Assessment

At the end of this year, learner attainment at grade 9 level will be measured as an indicator of "health" of the system. Will this be a true reflection? Unlikely. Teachers are teaching, aiming at achieving outcomes without any knowledge of what will be expected from them. It is expected from managers to manage functional institutions, yet planning ahead becomes a minefield if what is expected has not been defined.

Pilot schools were used in 2001 to prepare for how grade 9 performance will be measured this year. We welcome the involvement of educators in this process. Their contributions should be of great importance, provided that they will be taken into consideration. Pilot projects serve no purpose when the outcome lies in rubber-stamping existing policies. If policy makers are prepared to incorporate input and make the suggested adaptations, it will create the kind of partnership that will enhance accountability mechanisms. In the interest of our learners we suggest that we must be brave enough to postpone a systemic evaluation this year if it is evident that targets will not be met.

To maintain accountability, pupil performance must be monitored closely, preferably at the end of each grade. We hope that the clearly defined framework set out in the new National Curriculum Statements will assist in such monitoring.

CURRICULUM MANAGEMENT

Curriculum management should be administered at school and district level. A quality management system is imperative for the development and improvement of the system. Institutional managers should be instrumental in identifying their own needs, formulating appropriate support measures and monitoring programs. Support from districts is essential and must enjoy priority at all levels. It is important to utilize human resources to their full potential and develop capacity at district level. This will enable district officials to deliver quality and support. In order to do this, officials responsible for curriculum development must have expertise in the different learning areas.

ORGANISATIONAL DEVELOPMENT AND MANAGEMENT

The restructuring of districts has unfortunately not yet resulted in them being equipped to provide effective monitoring and support services to schools. Transforming a system needs time and we believe that districts will eventually be capacitated to manage and deliver the required accountability mechanisms. A specialist coordinator, as suggested by NAPTOSA, might fill the present gap. Departmental officials are also accountable to the learners and through them to parents and taxpayers.

Institutional managers have a responsibility to ensure that accountability mechanisms are in place and must provide support at school level. To improve public schooling good working relations must be established between schools and districts, as well as between provincial and national departments. Role players must acknowledge their interdependence. Shifting the blame leads nowhere. At some stage, the responsible parties need to admit: the buck stops here.

Educators and officials have to be personally accountable. Individuals must function within the parameters of a performance system. It will enable them to identify and remedy inefficiencies.

They will know what is expected and, by being monitored, have the opportunity to measure their performance. Managers will be provided with an instrument that can be used to measure whether performance targets have been met.

SCHOOL FUNCTIONALITY

Schools are at different levels of functionality. This factor must be recognized when they are being monitored. As much as we would like to see every institution being measured by using the same set of criteria, it is just not feasible. Development plans should take this into account.

WHAT SHOULD BE DONE?

The theme running through this presentation is one of individual accountability, particularly accountability to learners. It is not just teachers who should be held accountable for the performance of the system, but also all other important stakeholders including the Department of Education. Accountability goes hand in hand with the necessary support structures, which include clear policy guidelines and outcomes. What needs to be done to create a workable accountability system?

- Improvement of relations between schools, districts, provincial and national departments is crucial. We must get rid of the 'us against them' perception.
- Define clear outcomes and set goals. Bring all agents on board in defining these.
- Be more flexible during implementation processes. Admit when deviations are required, listen to the voice of implementers and have the courage to adapt.
- Open the lines of communication between role players. Build capacity and empower agents to be accountable.
- Create a pleasant working environment.
- Support and motivate teachers by providing developmental and supportive structures and create incentives.
- Educators should concentrate on what is in the best interest of learners and be prepared to remain positive. They must accept the challenge of transformation and change. Teachers should support initiatives that are in learners' best interest.
- Improve training methods. The cascade model of training and workshops is not always successful. The facilitators who are used are often not experts in the field, which puts the credibility of the trainers in doubt.

How can Unions be brought on board in this process?

The implementation of accountability mechanisms is a priority for the union, yet it primarily remains the responsibility of the employer. SAOU advocates co-operation with the system and will do everything possible to create such a climate. Members will be empowered by means of training initiatives .

CONCLUSION

Education is but one of the institutions of society. It cannot be used to change society, it follows rather than leads trends. Education cannot be fixed independently of fixing other things such as socio-economic conditions. Vision, mission and well-designed policies and development plans are not sufficient. Let us take action never losing sight of what is best for our learners.

ON THE RELATIONSHIP BETWEEN ACCOUNTABILITY AND SUPPORT

by Jonathan D. Jansen
Faculty of Education
University of Pretoria

A set of recent landmark publications[1] by the Joint Education Trust rightfully identify *accountability* and *support* as critical elements in driving up the quality of learning in our schools. Clearly we need both accountability and support. The key question I wish to address is how we think about the relationship between accountability and support in our efforts to conceptualise more effective and meaningful ways of altering what is still widely regarded as a mediocre education system, despite welcome gains in grade 12 performance averages.

I begin with a heuristic, a two-by-two representation of this relationship between accountability and support.

ACCOUNTABILITY

SUPPORT	High	Low
High	deep-change	wastage
Low	surface-learning	stagnation

The first point I wish to make is that when the system sets *low levels of accountability* and *high levels of support* (the first quadrant, moving clockwise from upper right to upper left), then **wastage** results. This has seldom been the case in the history of South African education, except perhaps in that small, privileged class of former white schools. But the majority of South African schools have never received high levels of systemic support. It is true in other organisational contexts, however, that high levels of support without requiring high levels of deliverables or products invariably leads to a wastage of critical resources in such organisations.

The second point of relevance is that when the system sets *low levels of accountability* and *low levels of support*, then **stagnation** results (the second quadrant). That is, the system simply grinds to a halt, the morale of constituencies remains low and, in the case of schools, the organisation simply 'ticks over' in terms of its core functions. This situation, I propose, characterised much of South African schooling during the 1980s when the inspectorate was ejected out of public schools and the

[1]The framing paper for this conference is one example: Nick Taylor (2002), Accountability and Support: Improving public schooling in South Africa, A systemic Framework, this volume.

apartheid state maintained its stance of non-existent support for the development of teachers (and, of course, learners). There can be little question that current attempts to increase both levels of support and accountability are up against an entrenched culture of stagnation, where accountability is seen as threatening and support likely to generate dependency rather than independent action.

The third point to observe in this heuristic is that when the system sets *high levels of accountability but levels of support remain low*, then **surface learning** occurs. Under these conditions, there is no effective and sustained disruption of the deep structure and culture of schooling as far as teaching and learning is concerned (more about this later). Worse, the stress of high accountability when support is low invariably leads to schools taking short-cuts to improve the external or demonstrable features of high performance without an institutionalised basis for such achievements in the culture and organisation of the school.

I believe that this is exactly where the South African education system is stuck at the moment. Accountability is high, and this is necessary; but while the level of teacher support has clearly increased since the apartheid days, it remains low and ineffective for reasons which I will explore shortly. The short-cuts lead to dazzling results, such as massive escalations in matriculation averages, even in provinces, such as the Limpopo, where "on-the-ground" observations defy such leaps in the statistics. Any matric teacher would be familiar with the mechanisms at play in both privileged schools, that seek to enhance or maintain their public image, and disadvantaged schools, that fear their blacklisting on the very public platforms set by politicians and the media acting, for once, in concert. Such mechanisms include the mass migration of learners to the standard grade, the "holding back" of learners from Grade 12 unless there is some reasonable assurance of a pass (in black schools) or a very good pass (in many white schools), and the narrow examination-focused teaching in which learning the rules of passing becomes more important than learning the broader conceptual tools such as critical thinking, abstract reasoning and complex problem-solving that are fundamental to success in higher education and in contemporary working contexts.

I believe that there is a place for the basics, an emphasis on learning fundamentals of writing, reading, and achieving. This is especially critical in disadvantaged schools where the routines of teaching and learning have not been settled in the organisational culture of such institutions - with disastrous results for those already disadvantaged by a racist past. The theoretical bases for this thinking are explored in an outstanding paper by Johan Muller, *Progressivism Redux*, published in Andre Kraak and Michael Young's (2001) recent **Education Policy in Retrospect** (Human Sciences Research Council). In a meta-evaluation of a report that is scathing in its judgement of a school development approach in Cape Town's townships because of a lack of constructivist teaching, I made the following related points:

> *It is a matter of some consensus among those who work in township schools that the lack of materials, the lack of qualified teachers, the lack of time and the lack of home-based support, often work together to favour 'direct instruction' so that the basic discipline of learning (focus and concentration on a problem) and the basic rules of subject learning (like*

using established algorithms in mathematics) can first be attained. There is no question that over time, there can and should be gradual shifts towards a more open-ended, constructivist-style pedagogy once basic levels of professional confidence and subject matter competence have been established among disadvantaged teachers: but this cannot happen immediately when the rules of learning and the discipline of teaching have not yet been achieved. Under these conditions, a high level of curriculum organisation with scheduled exercises and supporting materials can be of inestimable value to teachers and learners.

The fourth point is the ideal towards which we should strive - *high levels of accountability and high levels of support.* We are not there yet. The levels of accountability are exceptionally high under the current leadership of the Ministry and Department of Education. Schools anguish over results. The language of performance has penetrated even the most isolated and poorly performing schools. The risks of non-performance, especially in some provinces, can be fatal to the careers of both principal and politician. The pressure is on. But what exactly is it about support that remains problematic, beyond stating the obvious, that support levels are low?

Schools do not experience support as coherent, comprehensive and sustained.
Think of how many evaluation and assessment-related policies will affect grade 9 teachers in 2002 and you begin to understand how the lack of policy coherence can confuse teachers and work against the first element of a basic support system in any professional environment: clear, consistent and coherent guidelines for action. Think of the multiple project interventions in a single school by different NGOs, universities and the provincial government, and you begin to understand the problem of confusing high levels of activity with meaningful impact. But support is not only lacking in coherence, it also lacks comprehensive or systemic qualities: single-factor interventions dominate. For example, the NGO or university cordons off grade 11 mathematics as the problem, without asking questions about the supporting resources or the school climate or the foundations of grade 10 mathematics, and so on. It is clear from our work in Pretoria West schools that targeting grade 12 subjects without working downwards into grades 11, 10, 9, and so on, simply does not create a sustainable platform for school-wide quality. But support is also sporadic, short-term and funding-dependent rather than sustained. Two- or three-day workshops must be the most inefficient way of training teachers in contexts where the levels of professional competence and personal confidence are so low. Such sessions invariably turn out to be information-sharing opportunities rather than teacher development workshops.

Because of a weak support system, school interventions have seldom disrupted what David Tyack and his colleagues call "the grammar of schooling".
Change, especially in the institutional energies of schools, requires strong and appropriate intervention strategies. We are now all alert to the ineffectiveness of the cascade method of training teachers in disrupting school culture, routines and behaviours. The assumption that a training message is carried without interpretation problems from one level to the next in an education hierarchy is flawed. The short-term nature of training,

often removed from the classroom context, is another lesson not yet learned in recent reforms. Direct, sustained, classroom-anchored training is the only means for beginning to disrupt the grammar of schooling. Yet this does not happen. In the process, the form of change is often mistaken for the substance of change. A South African demonstration of this problem is the mantra of learner-centred instruction that accompanied post-apartheid education reforms. Teachers everywhere interpreted this policy goal as meaning that learners should be organised in groups. And so, research and anecdote showed that while learners were physically organised in groups, they remained in didactic teaching situations and conventional learning contexts. Yet, the pedagogy of learner centeredness cannot be read from a manual: it needs to be demonstrated through close and sustained work with teachers, through the provision of workable exemplars, through evidence of success in the contexts within which the targeted teachers work. The training and support model implied is time and resource-intensive. Reversion to form is easy in a system that rewards compliance rather than dissent from the norm of prevailing practice. There is no chance of initiating deep change unless we are prepared to make the commitment of time and resources that engage and sustain classroom anchored change.

Support systems, especially those characterised as "outside in", remain weak because of critical deficiencies in the quality of such support to schools.

Capacity, in Michael Fullan's memorable words, requires capacity.[2] Support led by government officials has often lacked three critical qualities. One, the lack of technical expertise i.e., content knowledge of the intervention. Two, the lack of consultancy expertise i.e., how to take a school through the processes of analysis, reflection, feedback, follow-up, and so on. And three, the lack of interpersonal expertise i.e., how to win over reluctant teachers, already burdened with existing workloads, into a new project or reform that makes additional demands on time and energy. Such skill and maturity are seldom found among district-level officials, and such persons are commonly perceived as "messengers" rather than vital capacity builders in the local school system. In part this problem results from a failure to use institutions like universities and reputable NGOs whose specialist expertise should be mobilised by provincial governments to work with schools in teacher development and school change. But this seldom happens.

The long term resolution of the problem of effective support lies in the scope and quality of pre-service training.

The problem of basic teacher capacities lies in a history of under-preparation of professionals for the school environment. It follows that the long-term solution is to strengthen the quality of training for beginning teachers. But there are other problems associated with this task, including the fact that fewer and fewer matriculants choose teaching as a career. The reasons are well-articulated, but the problem remains. I still believe that a Summit of Deans of Education and the Minister of Education to talk about this urgent national concern is now overdue. The Summit question should be simple: **how can we once again make teaching a profession attractive to our young people?** If we get this right, the challenge of teacher in-service support can be taken to another level in the future, to the more

[2]See Michael Fullan (2001), Leading in a Culture of Change, San Francisco: Jossey-Bass Publishers.

advanced professional training of already confident and competent public school teachers.

The best available means for enhancing teacher support is through a tri-partite relationship between public schools, provincial government departments and local universities.

We have not been able to optimise the relationship between schools, government and universities in the search for effective teacher development. In our failure to bring these three partners together, drawing on their respective strengths, we have not made an optimal impact on changing teachers or developing schools or improving learner performance. Government departments have the authority to draw schools into a programme of extended teacher support and to set high standards of accountability. Universities, and Faculties of Education in particular, can provide high quality teacher support through their in-house professional expertise, as well as research, evaluation and monitoring functions that can track the impact of in-service training. Schools can organise their time and resources to make teachers available for such training and to establish and co-ordinate long-term developmental relationships with neighbouring universities and, indeed, non-governmental organisations. This is the experience of the University of Pretoria with the Gauteng District Office and 12 high schools in Pretoria West (Atteridgeville and surrounding areas) during 2001. In this partnership there is growing evidence of impact on performance where each partner commits on the basis of its position of advantage.

The crisis in support requires that we develop an articulate explanation ("theory") as to how schools change in the context of developing countries.

We cannot develop a theory of change based on anecdotes or generalise too quickly on the basis of a few exceptional schools. Nor is it very useful to apply models or theories of school development that draw on contextual conditions, institutional forces and political cultures that operate in well-resourced or well-established systems of education. What third world education requires is an articulate explanation for how schools change within the varied contexts of developing countries. Why do some schools change without any perceptible increase in resources? Why do well-resourced schools not change? What happens inside the majority of schools - the "non-special" or average schools that are neither highly effective nor are blacklisted as ineffective? It is not enough to keep generating low-level data on performance. We must also link this systematically to innovative ways of explaining both change and non-change beyond the simplistic and the obvious.

I believe that the paper provided by Taylor (this volume) offers a very useful starting point for theorising change in innovative ways. This initial elaboration of the relationship between accountability and support hopefully constitutes a useful contribution to the development of elegant, parsimonious and powerful explanations for school change that resonate with the experiences of school-level practitioners.

DEVELOPMENT, SUPPORT AND ACCOUNTABILITY

by John Lijners
Western Cape Education Department

This paper will reflect on the Western Cape Education Department's (WCED) practical experiences in dealing with schools. One of the vexing questions that we are faced with is how to find a balance between support, development and accountability. We have a number of mechanisms to provide schools with the support that they require. We also have a number of mechanisms aimed at enhancing accountability. I will reflect on each type of mechanism put in place by the WCED.

SUPPORT MEASURES

One of the programmes that we conduct each year in our province is the **early enrolment campaign**, which we start in February, and which is supported by a media campaign with the intention that the enrolment of learners is finalised by October / November of that year. We also make room for contingencies, so that when the admission policy was relaxed at the end of 2001, we could deal with that.

We also have a programme to promote the **procurement of learner support materials.** As soon as we have made the budgetary allocations to the schools, we start to monitor the procurement of learning support materials. We provide regular reports both to our MEC and to the media on the progress that schools are making. Through assisting schools to procure their learner support material, we are able to report that by the end of 2001 almost 95% of our schools had procured their learner support materials. .

We also assist schools in their plans and **preparations for the first day of school,** so that they allocate teaching duties and finalise their timetables and year plans by the end of the previous school year. The aim of this is that most schools are ready for the first day of the new school year. We assist schools by ensuring that teachers are appointed timeously. We also provide support and the development opportunities for school governing bodies.

We have recently restructured our education department. In the past, we had nine Area Offices, which we have now restructured into seven Education Management and Development Centres (EMDCs). There are a number of focus areas in these EMDCs: institutional management and governance, special learning and education support,

curriculum development and support and administrative service. Officials from these different areas work together as a multifunctional team and they provide support to schools by means of a comprehensive tool which audits schools' strengths and weaknesses. Based on this audit, a school development plan will be created under the guidance of these multifunctional teams, with the intention that schools become learning organisations.

ACCOUNTABILITY MEASURES

At the same time as having support measures in place, we also have **quality assurance systems.** These systems include both developmental appraisal and whole school evaluation, implemented by our multifunctional teams. With respect to performance measurement, we have the National Curriculum Statements, systemic evaluation and the monitoring of learner achievement.

In addition to these measures, we also use the "blunt instrument" of sending our entire broad management team into the province on the first day of school. We inform schools ahead of time that our broad management team members will be visiting them. We give the schools their itinerary; we also give them the team's times of arrival. We have 31 members in the broad management team, and all of them this year returned to the office reporting the same thing: they found well-managed schools, ready to go, on the first day of the school year.

However, not all schools can boast of the same level of achievement. In order to set the scene for a discussion of school accountability, I will relate my experience of visiting a poorly managed school. I arrived at the school at 7.30am having been told by the principal that they start at 8 o'clock. At the school I found hundreds of parents and grade 1 children, milling around with one teacher alone, the deputy principal, directing them like a traffic officer. This carried on from 7.30am until 8 o'clock. Nobody else had arrived by that time. I think that because I was there, the deputy principal decided that 8 o'clock was the starting time, so he rang the bell. In the process I asked him how many learners were enrolled at the school and he replied, "Well, there are 1 400 learners." And when they were all standing in front of him, all these little ones confused, I noticed that there were barely 300 children. Still he was alone. He started the assembly and whilst he was praying, teachers sauntered in, children sauntered in and he just carried on with the assembly and lo and behold, at about 8.10am the principal arrived. He just looked at the scene and took over the assembly.

As we walked about in the school, the classrooms were all locked. When eventually they were able to open the doors, the desks were stacked on top of one another, remnants of the class party from last year were still visible. There was no way that those 1 400 learners could start school on that day, as there was no sign that anybody had been busy preparing the classrooms during the two previous days, getting them ready for the first day of school.

We must therefore ask: How do we implement accountability systems? The only way that we can do it would be through a performance agreement or a performance contract. Whilst our EMDCs are headed by directors and there are performance agreements in place for them, this type of agreement should be extended to the other staff in our EMDCs.

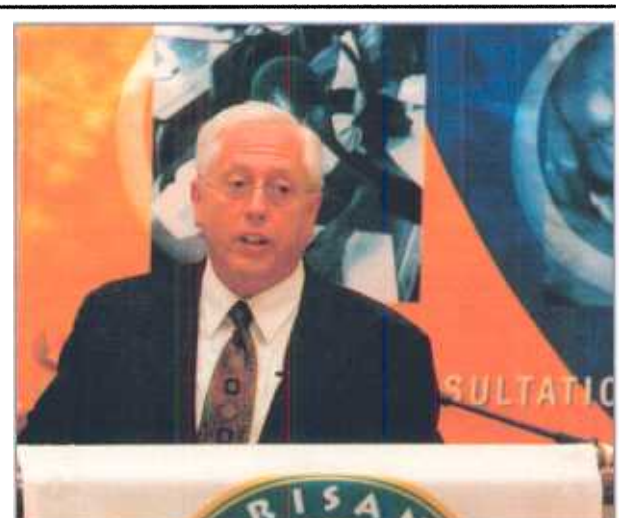
The system, schools and individual teachers should be held accountable.

There is one common feature in our "at risk" schools: a lack of leadership by the school principal. Very often the shortcomings that are identified by various stakeholders have to do with the personality traits of such a person – for example poor interpersonal relationships or poor communication skills. In these schools the principals are often permanently appointed and the institution of disciplinary steps based on alleged personality "defects" is almost impossible. It is difficult to take action against principals who have been permanently appointed.

We propose that school principals should have a performance contract and that perhaps they should be appointed on contract for five years at a time. We are considering establishing an in-service training institute for teachers. Prospective school principals could also be trained at such an institution.

Lastly, I think that as far as individual educators are concerned, we should institute performance evaluation for teachers so that we implement accountability measures as far as we possibly can throughout the system.

Zodwa Dlamini, Khulisa
Chair: *Focus on accountability mechanisms*



Don Foster-Gross, USAID
Chair: *Focus on Support Measures*

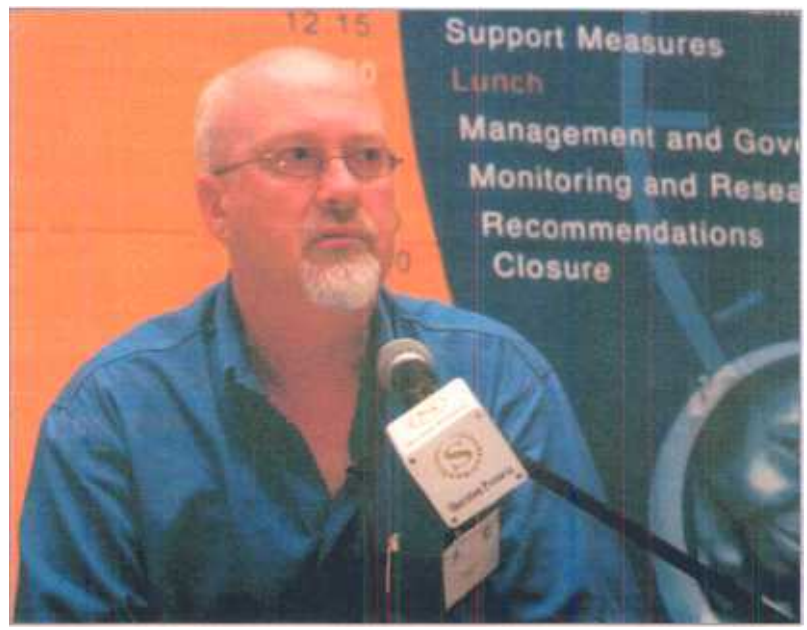
Mark Potterton, Catholic Institute of Education
Chair: *Focus on Management and Governance; Mediating Accountability and Support*

Miriam Sekgabutla, Limpopo, DoE
Chair: *Focus on Monitoring and Research*

MEDIATING ACCOUNTABILITY AND SUPPORT

by Jon Lewis
South African Democratic Teachers Union (SADTU)

Professional and teacher development have been issues of prime concern for SADTU over the last decade. This is about upgrading under-qualified educators and equipping all teachers to deal with the demands of the new curriculum and transformation. This is obviously crucial to the whole area of school development. Given this emphasis on teacher development and support, we respond to the present debate in a particular way.



SCHOOL DEVELOPMENT

There are a number of critical issues to be considered in regard to school development:

- After eight years, since 1994, why is there still no comprehensive national plan for teacher development to address past deficits, present needs and future curriculum development?
- Linked to this, why has the department made no attempt to implement the agreement on 80 hours of professional development and has largely frustrated the implementation of DAS (Developmental Appraisal System)?
- Why are there no national programmes to empower the various levels of management – including school and district levels – despite the fact that senior officials spent a lot of time and resources on international study tours in the 1990s exactly to develop such programmes? Without these kinds of measures being in place any talk of accountability is premature.
- Support programmes have been largely provided by NGOs, but these have been ad hoc and have lacked a national plan. As a result, these programmes have had minimum impact. We are bound to ask: why has this state of affairs been allowed to persist? Millions of rands in donor funding have made little real impact on the education system.
- Why have massive infrastructural inequalities between schools and classrooms still not been addressed – resulting in the continued absence of basic services and learning materials in most rural poor communities?

ACCOUNTABILITY AND SUPPORT

There are a number of critical issues to be considered in regard to 'accountability

and support':

- 'Support' sounds rather passive, condescending even. We would prefer a more active term such as "development"
- We must all be accountable for the public resources we use and be measured against the outcomes and objectives we set. That of course also holds for departmental officials and NGOs that use public and donor funds, as well as for teachers. But our concern is this: what does the department understand by the term "accountability"? The experience of educators and teacher unions since 1999 is that they are actually talking about control. An example of this is the two year battle between the Minister and the teacher unions over control of the South African Council of Educators (SACE). Another example would be the Gauteng EAZ programme, which was certainly seen by unions as teacher bashing largely for the benefit of the media.

More generally, we note that the support-accountability paradigm in the paper comes largely out of a theoretical debate amongst educationists. If one looks at real historical processes and struggles within the education sector since 1999 a slightly different picture emerges: between a model of consultation and development on the one hand, and unilateralism and control on the other. We believe that a more objective review of DoE initiatives over the past few years would indicate a clear shift from commitment to support/development towards monitoring/policing, albeit sometimes under the rubric of accountability. Indeed, in many ways the debates and struggles over SACE were exactly over what weight to give to its developmental role, and whether it should be seen as primarily a disciplinary body.

PROCESS

The paper identifies two levels of discourse – the theoretical debate (inside-out/outside-in), which must nonetheless take account of the empirical facts on the ground, in the classroom. But there is something absent here, we believe – the whole question of process also needs to be addressed. For SADTU the greatest weakness of the EAZ programmes was the failure to consult and to take on board unions and teachers. Other examples of this top down, even authoritarian, approach from the department include:

- the Curriculum 2005 review process,
- Whole School Evaluation, and
- the National Teaching Awards (certainly during 2000; 2001 saw concerted attempts to secure teacher union support)

These initiatives were largely unilateral, and expert and consultant driven. We need to make the point that if teachers do not buy into these initiatives they will not work, and frankly there is no reason why teachers should be accountable for the outcomes.

The one exception to this trend was the DAS programme, which was researched and negotiated with the teacher unions. The agreement was signed in the Education Labour Relations Council (ELRC) over three years ago. Why then has the DoE failed to implement it? We might speculate about the following:

- After 1999, and until quite recently, the department simply no longer valued meaningful consultation with stakeholders.
- We also suspect that a comprehensive developmental appraisal system would require a commitment to provide resources (ie. If you are going to identify teachers' weaknesses, you need a developmental strategy to address such needs). Such a

commitment was largely absent, probably as a result of budget constraints associated with the GEAR policy.

- The result is that the department has simply opted for cheaper policing measures such as Whole School Evaluation.

MANAGEMENT AND GOVERNANCE

Regarding performance management systems (PMS):

- Any attempt to measure performance, prior to implementing training and support would be a waste of time and resources.
- If PMS is implemented as yet another stand-alone programme on top of everything else, and given the lack of capacity at school and district level, this will result in overload. Any PMS system has to be fully integrated with current programmes and accompanied by appropriate training and support.
- If PMS is viewed as a policing mechanism – further teacher bashing in other words – it will not gain support from teachers and unions.

Regarding performance management and development appraisal:

In many ways they are two sides of the same coin. Both involve the following core processes:

- review/appraisal of performance against some kind of standard
- identification of weaknesses
- development of a remedial programme
- monitoring/further appraisal

The main differences would probably be the following:

- whether the prime objective is development or control
- this would, in turn, dictate whether it is tied to a system of rewards and punishments.

As SADTU, we believe that the starting point for this debate must be a return to DAS:

- DAS incorporates notions of both "accountability" (of every individual teacher) and "support" (teacher development based on needs).
- It is a comprehensive approach, covering all teachers as well as lower levels of management. It seeks to mobilise the system as a whole for development and transformation, not simply to sample for the purposes of systemic evaluation.
- It has "buy in" from the teacher unions who represent almost 100% of teachers. Indeed, DAS is a legally binding collective agreement through the ELRC. A policing scheme brought in on the cheap, by overseas or local consultants, will never have the same legitimacy.
- If DAS needs to be reviewed and renegotiated in the light of more recent developments, so be it. But DAS remains the starting point and the first option for teacher unions.

MONITORING AND RESEARCH FOR SYSTEMIC REFORM

by Johan Muller
University of Cape Town

Educational research has periodically had a bad press from the public. Sometimes this is justified, sometimes not. When it does not give policy makers what they want, the results can be dramatic. Robert Kennedy is reported to have once scolded a project evaluator: 'Do you mean that you spent $1 billion and you don't know whether the children can read or not?' (Lagemann, 2000, p.202). The project was radically modified. Kennedy in this case was looking for effects after less than a year of project implementation, as the beleaguered evaluator tried to point out to him, and in truth, policy makers do not always appreciate the kind of planning, effort, time and money it takes to produce valid, reliable, large-scale policy research. I will return to this. But Kennedy had a point. What is policy research for, if not to contribute to better decision making? This goes to the heart of the matter – the relation between reliable valid data and decision making – but not quite in the way Kennedy had in mind, as we shall see in a moment.

In this presentation I take it we are talking about research and monitoring in the context of systemic reform as outlined by Taylor (this volume). I will confine the discussion to schooling. The first question that arises is: *what is the crucial difference between systemic and non-systemic reform?*

Traditionally, government is judged as to whether it provides *equality of opportunity* (as judged by a comparative assessment of inputs or resources) or by learner success (as judged by matric scores). The government however, again traditionally, usually takes responsibility for the former only, and on this basis accounts to Parliament. Learner success or lack of it is variously attributed. Most recently, educator common-sense has attributed it to pedagogy, giving rise to a host of INSET interventions all more or less based on the belief that what teachers need to make learners succeed is more pedagogical content knowledge. Indeed, so firmly do they believe it, that it is only recently that INSETers have acceded to the need to evaluate their contributions – with far from encouraging

FIGURE 1: FROM EQUALITY OF OPPORTUNITY TO OPPORTUNITY TO LEARN

A +	B +	C +	D = opportunity to learn
what do learners bring to class?	what is to be learnt?	what resources are provided?	what is instructionally provided?	what is learnt, by whom?
Socio-economic status prior knowledge	curriculum statements	classrooms libraries laboratories textbooks learning materials qualified teachers T/P ratios	subject content ■ topic coverage ■ cognitive demand pedagogical content and style	individual performance ■ achievement scores systemic performance ■ attendance rates ■ drop-out rates

results, in the main. Nonetheless, if we ask who is accountable for learner success – who benefits from success and who bears the costs of its failure, who really carries the can – then the answer is: the individual learner. To put it even more strongly: in non-systemic policy systems it is learners who bear the costs of systemic inefficiency. It is they who must carry the consequences for a mis-aligned and unaccountable schooling system.

Shifting the accountability back on to the system is the core rationale of systemic reform. The principal mechanism for doing that is through alignment: by aligning the curriculum (what should be learnt), the pedagogy (what is made available to be learnt), and assessment (which measures the degree of correspondence between what should be learnt and what is learnt). The more that what should be learnt and what is made available to be learnt is maximised, the more opportunity to learn (OTL) is maximised. Maximising opportunity to learn is thus the main aim of systemic reform, and its main mechanism is aligning the three areas of schooling operation, and then supporting its realisation.

Can systemic reform be demonstrated to be effective? The answer seems to be yes. In a number of studies, in a wide variety of settings, systemic reform has precipitated remarkable gains, especially in the achievements of disadvantaged learners. Taylor has already referred to some of them in his paper. Attributing effects specifically to systemic reform, that is to alignment, is not easy since it requires showing that learning gains can be made and sustained over time, and by eliminating contending possibilities. In one of the largest studies of this kind – significantly commissioned by a private foundation, Rand – the scores of all American states were compared on the National Assessment of Educational Progress (NAEP, the 'nation's report card') tests over a period of seven years (1990 - 1996). Since in first world countries like the US family background (socio-economic status - SES) still accounts for at least 80% of the variance, only learners from similar home backgrounds could be compared. That done, it was still clear that learning gains

could be shown for disadvantaged learners in some states but not in others. What made the difference?

Three sources of evidence point to structural reform as the cause of these gains. First, these gains cannot be explained by major changes in resources. Second, the rate of gains varied widely by state, as did the structure and intensity of reform efforts. Third, a case study of two states with the largest gains – Texas and North Carolina – suggested that a series of similar reforms in both states linked to **aligned standards, assessments, and accountability** was the most plausible cause of the gains (Grissner, Flanagan, Kawata & Williamson, 2000, pp.99-100).

Supposing for the moment that this would be applicable in South Africa too – a supposition amenable to research – here are some *implications for monitoring and research.*

The first implication concerns reform as experimentation. Reform, looked at as we just have, presents itself to us as a set of hypotheses about likely effects against a field of possible causes and effects. We can see that every policy and every intervention makes an implicit hypothesis, places a tacit bet, that this factor, or set of factors, arranged in this way, will produce the desired result. To put it even more baldly: every reform makes a causal assumption. Take the original Curriculum 2005: it assumed that the curriculum written as a set of outcomes rather than content statements, together with a heavy emphasis on learner centred pedagogy, would produce the achievement outcomes we wanted. Research very quickly showed that it didn't, and if we were to summarise the central gist of that research, it would be that the curriculum as a set of outcomes cannot function as a learning target. Consequently, what was provided could not be aligned with anything. It was a failure of alignment.

A second conclusion from reform as experimentation is that it makes good sense to follow through and do the experiment, in order to see whether the hypotheses built into the intended policy or intervention check out in reality. This is a fundamental premise of systemic reform and underlying philosophy of data-driven decision making, to which I will return again below. In short, systemic reform requires information regularly produced and updated by monitoring and research.

A second implication concerns alignment as a set of multilevel causes, rather than a simple correspondence between one factor and an outcome. Assessing alignment entails assessing the extent of correspondence or agreement between the intended curriculum, actual instruction, and achievement, not simply asking whether one or other input or process factor 'makes a difference'. For example, many evaluations of INSET or 'whole school' interventions currently commissioned by funders ask whether the intervention has 'made a difference', that is, they ask for indices of instruction – achievement alignment. But there are at least two other questions that also bear on the answer: Is the intervention aligned to the intended curriculum? Is the intervention directed towards teaching the intended curriculum better? If not, then no matter how worthy the intervention, it is not maximising OTL. Secondly, is the assessment for the evaluation aligned with the intended curriculum? If not, then it is not a valid test of the intervention, again, no matter how innovative the test. As I said before, only now, with the development of the National Curriculum Statements (NCS) for the General Education and Training Certificates, do we have a clear, national set of intended curricular benchmarks. In this sense, the

NCS has only now allowed us to consider the possibility of systemic reform.

To summarise then: the systematic research and monitoring of alignment requires developing and maintaining a full set of indicators and connections. Simply making these public is a big step forward. This renders the delivery of OTL transparent by making the breakdowns in alignment visible. This in turn is absolutely crucial for data-driven decision making. But for whose decisions is the data? Schools are naturally wary of this kind of transparency, since they fear punitive sanctions for failure. They don't want some of the costs of failure to be shifted to them, and in this sense they are averse to accountability. The data, however, is in the first place for them, not for government. Schools and teachers are thus the primary target of data-driven reform, because they are the primary agents of reform:

> "The theory of action of the basic standards-based reform model suggests that, armed with data on how students perform against standards, schools will make the instructional changes needed to improve performance."
>
> (Elmore & Rothman, 1999)

It is only when they don't - when they refuse to be accountable - that government should consider further steps. This is how accountability and support work in practice.

Schools and teachers are the primary agents of reform because policy on its own can't bend professional practice to its whim and will. Policy makers the world over have learnt, sooner or later, that you simply can't mandate teaching change. It is the teachers themselves who make the change, or not:

> "We have learned that we cannot mandate what matters to effective practice...the challenge lies in understanding how policy can enable and facilitate it."
>
> (McLaughlin, 1990)

This point clarifies the appropriate role for government. Having set in place the appropriate instruments of alignment – the NCS, national assessment instruments (hopefully still to come), and coordinated and facilitated research and monitoring – the test for good policy then becomes: to what degree does it enable and facilitate?

> "Policy functions best in providing enabling conditions for good teaching, not in controlling teaching in ways that might impinge on good judgement."
>
> (Elmore & Fuhrman, 1995)

Or, as Taylor said earlier, you can't push a piece of string. In this sense, systemic reform moves away from policy-driven reform and management and towards a more bottom-up, data-driven model of reform and management.

Systemic reform thus requires research and monitoring of a sort and on a scale South African schooling has not yet seen. It will require sophisticated qualitative methodologies and also sophisticated statistics, for ranking the importance of factors that help or hinder OTL, because a sample representative of the relevant learning population will necessarily be involved. It will require longitudinal studies with mixed methodologies. Above all, it will require a new mind set towards research organisation and research funding. I can mention these only briefly here:

- *Trans-institutional arrangements.* It is quite certain that no single institution presently possesses the requisite

expertise to serve the data and research needs of systemic reform, especially not the requisite statistical expertise. One possibility would be the purposeful building of institutes with the requisite expertise in selected sites around the country. This would however, probably take far too long, and may in any case not succeed: high-level expertise is too mobile to restrict to any one site. The most logical possibility may be to look at creative partnerships either between institutions or at least through the creation of project teams composed of individuals from a number of institutions, though project-managed by one. The shortage of expertise raises the question of where the next cohort of technically specialised researchers will come from, and centres of high-level research training may well have to be purposefully supported to facilitate this. Inter-institutional research training has been tried, and has met with mixed results.

- *Funding.* A more conscious co-ordination of efforts from public and private funders would be required. A decent large-scale multi-year research project is likely to be expensive. So far, research funding has been modest, and it is no wonder that university-based researchers at least have opted for small-scale qualitative studies, simply because the money for a more comprehensive study is not readily available. The role of private foundations in the United States is instructive in this regard. Ellen Condliffe Lagemann (2000) gives countless examples of creative grant-making by the large foundations, where they have shown themselves willing to take risks by putting resources behind little more than a good idea, backing the individuals involved to pull it off. And if the private institutions begin to fund innovation, taking risks to open up opportunities, then the State and provincial structures must be ready to support and sustain promising initiatives. What is beyond doubt, though, is that the present level of spending on research and monitoring is woefully inadequate.

It is worth saying in conclusion that co-ordinating a research effort to support something like systemic reform is by no means as restrictive or prescriptive as it may sound to some. There are a myriad of research projects that could bear on it, as the flood of research in countries like the US and the United Kingdom will show. Nor is it all about quantitative research. I think it is fair to say that as more and more complex large-scale research projects get underway we will see such a mix of methods that the quantitative/ qualitative distinction will begin to disappear. In pursuing the basic accountability question – "are the learners getting what they rightfully should?" – we will soon see that there is a very wide variety of ways of addressing the issue. The intellectual coordination occurs at the framework level, leaving maximum freedom for creativity to researchers. It would certainly be undesirable, not to mention against the spirit of systemic policy coordination, for the state or funders to try to set the research agenda beyond the enabling framework. Any such prescription would amount to trying to push string again.

Finally, 'decision-oriented' inquiry of this sort should never 'crowd out' more basic 'conclusion-oriented' research (Lagemann, 2000; Cronbach & Suppes, 1969). Not only should both co-exist, but the former depends upon the continued vitality of the latter. In many fields of endeavour, both public and private funders have put all their eggs in the 'decision-oriented' basket, only to find that

'conclusion-oriented' research withers from lack of sustenance, with a consequent shrivelling of the entire bush. Some coordination between funders on this matter is an urgent necessity for the vibrancy of a field of research just about to take off.

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Kholofelo Sedibe, JET
Chair: *Recommendations*

Cas Lubisi, University of Natal, Pietermaritzburg
Rapporteur: *Recommendations*

SPOTTING THE POLAR BEARS: THE VALUE OF RESEARCH AND MONITORING - A RESPONSE

by Margie Keeton
Tshikululu Social Investments

I would like to highlight some issues in the important field of research and monitoring, and to consider its role in guiding and informing school development and in improving the quality of education. As government, NGOs and donors, do we ask ourselves questions about the efficacy of the policy, the resources and the commitment that we make annually to school education? Is all of this actually achieving what it should? Are we allocating all this time, effort and investment to the proper priorities and needs? If you think about it, school education is without doubt the most challenging, complex and overwhelming field of endeavour in South Africa - there is nothing to match it. That is a result of a number of things. There is, of course, our own apartheid history - where we certainly managed to make things a whole lot harder, denied people opportunity and created gaps and inequalities in the system. There is also the importance of what we are doing in the schools: we are building future citizens and we are building future prosperity and democracy. Finally, there is simply the sheer scale of the endeavour.

THE IMPERATIVE OF MANAGEMENT INFORMATION

School education is by far the largest national enterprise. On any day in the school year, some 12 million learners are gathered in some 29 000 sites of learning to be taught, more or less purposefully, by 375 000 teachers. That level of activity rivals any form of big business and it rivals any other form of government activity - it is national enterprise on a colossal scale. The scale of activity poses a huge management challenge – and you cannot manage anything if you don't have the necessary management information. So this is where research and monitoring comes in. It is quite alarming but true that, as Professor Muller said about schooling in South Africa, "we don't know – we don't have the information."

What kind of information do we need?

There are two kinds of management information that are critical. The first is contextual information. Borrowing from the medical fraternity, we need information on the vital signs of the education system. We also need

information on the impact of the activities that we are undertaking: what differences are the improvements that we are trying to bring about, and the many new initiatives that are being implemented?

ICEBERGS AND POLAR BEARS

Contextual information is also extremely important because, if we don't know where we are starting from, then how on earth are we going to know where we are heading? Similarly if we can't identify the obstacles on the way, how will we know how to get around them? In this regard it might be helpful to reflect on a little anecdote from a man whom I thought was perhaps born a hundred years too late. His name is Robert Swan and he is one of the great polar explorers; he has walked to the North Pole and to the South Pole. I had occasion to meet him and I was interested to hear which he considered the more difficult – to walk to the South Pole or to walk to the North Pole. He said that without doubt, the North Pole is far tougher an assignment than the South Pole. He gave two reasons for this answer: the first reason was that the Arctic is just one large mass of ice, unlike Antarctica which is a continent. In the Arctic icebergs are continually breaking off. This means that you could be confidently heading along with a great deal of energy and conviction, thinking that you are heading North, but you are actually on an iceberg that's broken away and you are heading South! It is very possible that we are doing that in the education system. We are on an iceberg and we think that we are making huge progress, but the iceberg is drifting away from our destination faster than we are able to make progress towards that destination. The second reason why he said that the North Pole was such a tricky adventure was that it, unlike the South Pole, has polar bears. The South Pole is also very level and flat, whereas the ice in the Artic is broken and forms outcrops. As young male polar bears grow up their fathers chase them from the family den and at this time they get very grumpy indeed. They hide behind the ice outcrops, waiting for an unsuspecting polar explorer to come panting past and they can, quite literally, take off your head with one blow of their paw. In the schooling system we desperately need information, research and data from monitoring to tell us where the polar bears are hiding.

UNCOVER THE HIDDEN REALITIES

One of the problems in school education in South Africa is that things are not as they seem - and we need to uncover this. We need to situate our interventions in the particular contexts where they are implemented and they need to be based on what is actually happening in the schools, so that the effort being made actually has a chance of succeeding. One of the big challenges is that we make assumptions about what is going on in the schools, and this is often quite different from what might actually be happening. Some illustrations of this: there are facilities that look like schools, but where little effective schooling is taking place; on the other hand there are other institutions that do not look like schools where a whole lot of effective teaching and learning is taking place. Equally, we know that learning levels are not often necessarily what they ought to be. If you assume that you are teaching a class of grade 4s, but they actually have a learning background of grade 1, then your interventions are going to go clean off target. Conversely, what of the rural schools operating from tents and under trees that defy all expectations and

year after year record an 80% matric pass rate? You will be familiar with many other examples, both good and bad, where the realities of South African school education differ from what might otherwise be expected.

Clearly what is bedevilling education in South Africa is the huge variation and range of highly interconnected factors. We have started to realise that so many things are interconnected – we have seen that you can't teach maths and science effectively if your pupils do not have effective language skills. We also know that you can't teach maths, science or language in a school that is not effectively managed. Once you know this, it can influence the type of interventions that you make and influence the range of activities that you engage in to improve a school. The role of research is to try to disentangle these interrelated factors and to identify the root causes of the problems, in order for us to know whether we are tackling the real problems.

DON'T LOSE FOCUS ON THE LEARNERS

Both in conducting research and school improvement programmes there is often a trade-off between depth and breadth. As anyone who has tried to take a photograph with a wide-angled lens will know, as you broaden the field of view and you bring more features of the landscape into the frame, so you are pulling further and further away from the original thing that you were focussing on, and detail is easily lost. In schooling this means that in addressing ever more interconnected problems, the focus of interventions is being pulled further away from the one group that you really are concerned about, who you really want to benefit, and that is the learners. The additional "features of the landscape" that you are adding are the district officials, key teachers and the school as a whole on which your interventions must now also impact. Where is the learner in this picture? At the end of the line? Everybody has a role to play in improving education, and each one of these interventions is critical but we cannot afford to lose focus on the learners. The value of proper research and monitoring will be the key to that critical focus on the learner.

As you are adding more dimensions to the school improvement picture, so you also add time - inevitably it will take longer to lock down different interventions. Unfortunately time is not on the school improvers' side. Individual learners are in the school system for one set of 12 years, and we have to make sure that their experience is meaningful. Part of the role of research is to help us keep focussed on what we are trying to do.

THREE LEVELS OF MONITORING THE STATE OF SCHOOLING

What about the vital signs of the system? Obviously we need clear indicators of the overall health of the education system and indicators of the impact that the various investments are making. These need to be measured, assessed and analysed at three levels. The first is the macro-level, and this is what Muller referred to when discussing systemic impact and systemic reform. The macro-level is the big picture – how are we doing nationally and what are some of the key issues? The micro-level means that you need to be getting into individual schools and individual classrooms. When working at these two levels (and Taylor - this volume - made this point in his paper) you need to make sure that they are

informing each other and that there is integration. But there is an additional level between the macro- and the micro-levels, which one might call the meso. At this level you have to monitor and look at what is happening behind the scenes - what are some of the trends that are shaping education? The following metaphor is the best way I can think of to illustrate this idea. If you think of a painting of a forest, the macro-picture is obviously the forest - where you can see all the trees. The micro-level is the detail in the individual leaves; this detail helps you to judge how good the artist is. But the clever artist manages to convey to you, without actually painting it, the impression that perhaps the wind is sweeping through the tops of the trees. You can sense it from everything else you see in the painting. The wind in the trees can change everything - many will know of many forces at work in schooling that we don't necessarily see, but we can feel. These are what one has to look for and assess properly at the meso-level.

What are some of these things that are fundamentally affecting education, but are not necessarily apparent from the macro- and micro-evels of analysis? I will just give two examples. Various research reports mention that one of the problems with education in South Africa is that the experience of schooling is a hugely disruptive one - learners are enrolled in one school for a couple of years, for any one of a whole number of reasons move on to another school, another province, another town or lose out altogether on schooling for a year or more. What impact is this having? How is it possible to have a sustained intervention if your learner body is not constant from one year to the next? My second example relates to the high repeater rates. Here again one must acknowledge the huge successes made in this area, as we have made great progress in terms of reducing the number of pupils who rewrite matric two or three times. A lot of attention is also being focussed on first year, grade 1, repeater rates. However, if you look at school enrolment ages, in every single grade, it is clear that you are teaching across an age span. There are learners two or three years younger and two or three years older than the proper age of the grade. This suggests that the repeater rate, in one form or another, is actually a part of the wider dislocation that is a feature of the school system. Those are some of the meso-level factors that we need to look at, to talk about and to inform each other about.

It is quite extraordinary how much research is going on - probably not enough, but an extraordinary amount nonetheless. What is worrying is how little education researchers seem to talk to one another. They are all highly specialised in their particular disciplines, but there is very little cross flow of knowledge to greater value. Clearly, there is huge learning taking place; the challenge is how to make it integrated, how to make it accessible, and how to give feedback to the actors on the ground in order that they may make themselves more effective.

IDENTIFY THOSE THINGS THAT MAKE A DIFFERENCE

Information and research are critical to a broad strategic focus. It is here that donors and politicians in particular need to look at themselves. Are we as government or donors – in one form or another – driving things and funding interventions for the right reasons? Or do we back things simply because we feel the need to be seen to be doing something? It is extraordinary how often in conversation with NGOs one will ask "why did you choose to run this

intervention in this particular group of schools" and the response is "oh, the donor wanted them there" or "the donor will only fund this." As donors we must be very careful about this kind of unthinking imposition. We want the best results, and operating in a certain group of schools because that is what seems to be appropriate at face value, when one has not thought strategically about it, is a waste of resources. Interventions need to be carefully developed and engineered for clear results and then implemented in a way and in places where they have a real chance of success. We cannot afford to make choices on sentimental grounds; we must be guided by what will really work, not just where it might look good. And so we really need research and monitoring when designing interventions. The research should answer basic questions like: what problem are you actually trying to address through your programme? How? Where? At what level in the schooling system? When is that intervention going to be effected? At what kind of intensity are you going to run the programme? Are you going to interact with school once a week, once a year? All of that has implications for the effectiveness of the programme and strategic variables and information that must drive these choices.

When we undertake research and monitoring we need a willingness to accept unpleasant facts. This is critical, as we want honesty, not perfection. There is no such thing as a perfect school programme or perfect intervention. Let us talk about the failures and the disappointments as much as about the successes. Let us not set ourselves up for the kind of successes that we can never actually achieve, because we have overblown our trumpets. Too often we disappoint ourselves because we take on the impossible, ignoring just how intractable and deep-rooted so many of the harsh realities of schooling are that we are so desperate to change. But progress can and is being made – we just have to recognise where and how. And here again research and monitoring must help us focus. Let's rather look for more modest, but sustainable kinds of progress and put all our energy into interventions that really do make a difference. There is a rich field of opportunity and reward waiting.

CONCLUSIONS

By Jennifer Roberts and Johan Muller

It is gratifying to note the broad unanimity that is displayed in the contributions published above. The presentations made by a wide range of key stakeholders in the education sector have stressed the need for improvement within education as a whole and have in the main adopted Taylor's model of educational development which emphasises the dual roles of accountability and support.

The contributions by presenters indicate an emerging consensus on the need for increased accountability measures and the implementation of performance management systems at different levels of the system, while at the same time providing educators with the necessary support to meet accountability targets. However interpretations of the notion of accountability sometimes differed between participants.

ACCOUNTABILITY MEASURES

Some of the accountability measures currently implemented focus on the management of behaviour and include the taking of decisive steps against those who bring the teaching profession into disrepute, particularly teachers guilty of sexual abuse of learners and other criminal acts. Some participants focused on different policy instruments and the extent to which they encompass notions of accountability – some of these include the implementation of a Development Appraisal System for teachers, the systemic evaluation of learners, systematic analyses and improvements in Matric pass rates, Whole School Evaluation and the signing of performance agreements by senior officials. These accountability measures operate at all levels of the system: the educational bureaucracy, the school, the teacher and the learner.

HOW DO OUR ACCOUNTABILITY SYSTEMS MEASURE UP?

A current definition indicates that "the quest for educational accountability relies on a three-legged stool: standards, assessment and consequences" (Fordham Foundation, 2002). How do local accountability systems measure up against this formulation? The National Curriculum Statements will provide the system with clear guidelines of what should be learnt in each subject by grade level, therefore setting clear targets to be achieved by learners. However targets are of little use in setting accountability measures if there are no systematic ways of measuring progress towards attaining these standards. The systemic evaluation initiative of the Department of Education only measures the performance of learners in a particular grade and has not been designed in such a way that each learner will tested year after year – cycles of evaluation will take place with each evaluation cycle focussing on a different grade. This system only allows for an assessment of how the system is performing, and not how individual schools (or teachers) are performing.

One of the most commonly cited accountability mechanisms – the Developmental Appraisal System – falls short of the accountability criteria outlined above as participation is voluntary,

assessments are not regular and the purpose of the system is to identify support or development needs, rather than to assess performance against accountability indicators. Any wholistic requires both accountability and support.

What consequences are attached to current accountability practices – particularly those based on policy? In implementation many of the policies outlined by different participants have placed greater emphasis on support and using evaluations to identify developmental needs, rather than to hold individuals accountable for performance. In order to do this, there need to be clearly determined standards of performance – not only with respect to learner attainment, but also for school functionality, teaching practice and educational management. At present there are few policies that specify behaviours and performance targets, except for the signing of performance management contracts by senior officials. Action has been taken against some poorly performing schools in Gauteng with the implementation of the Education Action Zones project, and in KwaZulu-Natal under-performing schools have been closed. The performance of these schools is typically based on performance in Matric examinations and schools' failure to reach certain percentage pass targets. One of the problems with this is that there are no measures which are able to gauge the quality and performance of primary schools. Furthermore, by focussing only on Matric pass rates as a measure of performance, the accountability mechanism is pitched at the end-point of learners' schooling careers, rather than identifying and diagnosing problems at earlier levels.

Despite a general consensus on the need for accountability mechanisms, contributors levelled a number of criticisms against current policy tools. Contributors from teacher unions all made mention of the fragmentation of policy initiatives and the lack of coherence between policies – both in content and in implementation. Although the different policy frameworks focus on performance at different levels of the system, their implementation remains fragmented, shared across different directorates of the bureaucracy. The implementation of different frameworks takes place in isolation from each other, contributing to the transmission of contradictory messages and a sense of implementation overload.

SUPPORT AND CAPACITY BUILDING

Contributors acknowledged that there are many support or capacity building initiatives operating at present, with Taylor estimating that 10 % of the country's schools are participating in some or other development initiative (over and above the support functions delivered by the Department of Education). However, most role players agree that support efforts are uncoordinated and of dubious effectiveness. Accountability and support mechanisms appear not to be inter-related, internally aligned and implemented in a coherent manner. In general, there was agreement that the level and quality of capacity building should be improved.

RECOMMENDATIONS BASED ON CONTRIBUTIONS

- ***The need for policy coherence***

When O'Day and Fuhrman wrote of systemic reform their main focus was on the need for policy coherence; as the standards based reform movement grew the term took on a slightly different

nuance. Contributors repeatedly focused on the need for increased policy coherence. Coherence should operate both horizontally and vertically. Horizontal coherence refers to coherence between different policy frameworks and their implementation mechanisms. Vertical coherence refers to coherence between different layers of the system and accountability mechanisms directed at learners, teachers, schools and officials.

- ***The setting of clear, parsimonious standards***

Performance standards need to be set at all levels at which accountability measures are applied in order for different groups to have a sound understanding of the targets against which performance will be judged. At present only some policy frameworks indicate performance standards, while others take a more descriptive approach preferring to detail what is taking place and then using this to identify capacity building needs.

- ***High stakes accountability mechanisms are neede.***

High stakes mechanisms require that fair, known and clear sanctions and rewards are attached to accountability mechanisms and that these measures are applied consistently and fairly.

- ***Reframing of practice around accountability measures***

Accountability measures should be inextricably linked to the provision of support to officials, managers and teachers in order to enable them to meet performance standards. Standards and targets should set direction for the system, support measures in turn should facilitate the meeting of these targets.

- ***Accountability measures should focus on "value added" measures***

Several contributors stressed the need for accountability measures to take into account schools' contexts and the conditions under which they operate and not to use exactly the same targets for a schooling system which is characterised by great extremes in resource levels, teacher expertise and learner socio-economic background. Value-added measures take into account learners' prior achievement and learner background when tracking schools' performance against targets. It is often meaningless to compare performance against the standards when not taking into account the differential capacities and starting points of schools.

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