

## **QUALITY ASSURANCE IN SOUTH AFRICAN SCHOOLS: AN INTEGRATED RESEARCH REPORT**

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### **Introduction**

The amalgamation of seventeen different departments of education (Govender, 1997:5) into a single non-racial department resulted in significant policy changes. The formalisation of the Labour Relations Act 76 of 1995 included focus on labour peace and the democratisation of the workplace – in response to worker unrest and dissent that characterised pre-democratic South Africa. The issue of time to translate legislation into pragmatic action by the public, (especially public servants as employees of the government) was avoided. But, real change, whether desired or not, represents a serious and collective issue characterised by ambivalence and uncertainty (Fullan, 2001:32) which requires time, energy and effort. The recently introduced policy innovation to enhance the delivery process of a quality education for South African schools is the Integrated Quality Management System (IQMS). IQMS is informed by schedule 1 of the Employment of Educators Act (EEA) No 76 of 1998. In terms of resolution 8 of 2003 an agreement was reached in the Education Labour Relations Council (ELRC) to integrate programmes on quality management which comprised of Developmental Appraisal System (DAS), the Performance Management System (PMS) and Whole School Evaluation (WSE).

### **The issue of quality**

The tenets of IQMS are underpinned by the purpose of quality management systems (Demmings) which are to determine competence, to assess strengths and areas for further development, to ensure continued growth (Senge), to promote accountability and to monitor the overall effectiveness of an institution (Kaplan & Norton). Quality comes through process improvements intended to

make a sustainable difference to the outcome of these processes (Murgatroyd & Morgan, 1993:xi). For organisations that have quality initiatives and quality programmes in place, measurement would be a central part of any such programme (Kaplan & Norton, 1996:119)

### **IQMS as a quality initiative**

IQMS seeks to amalgamate the DAS, PMS and WSE. The manual for IQMS (Section A:3) clearly indicates the purpose of each programme namely:

- The purpose of Developmental appraisal system (DAS) is to appraise individual educators in a transparent manner with a view to determining areas of strength and weakness and to draw up programmes for individual development (Formative evaluation).
- The purpose of the performance measurement system (PMS) is to evaluate individual teachers for salary progression, affirmation of appointments and rewards and incentives (Summative evaluation). The PMS essentially refers to managing poor performance and rewarding good performance in an open, fair and objective manner.
- The purpose of whole school evaluation (WSE) is to evaluate the overall effectiveness of a school – including the support provided by the District, school management, infrastructure and learning resources- as well as the quality of the teaching and learning (System evaluation).

At the core of these quality assurance initiatives lies the measurement of the work performance of the individual educator.

### **The educator and quality assurance**

There can be little doubt that the appraisal/evaluation/measurement of a teacher's quality is an issue that causes enormous controversy among the professional teacher fraternity. It appears, for example that most people who were asked to describe the best teacher that they had ever come across, would

be able to do so with little hesitation. This is probably because most people have been exposed to some or other aspect of the teaching process and hence readily provide an opinion about the quality of teaching performance.

One of the problems of evaluating a teacher's quality is that the criteria one uses to come to an answer differ among people. Some people will base their choice on emotional reasons whereas others will base their decision on the teacher's particular subject knowledge. Another problem is the use of the words in the introductory paragraph, namely appraisal, evaluation and measurement.

In order to investigate any evaluation system one needs to do so using certain standards or criteria. This topic will use the criteria of Grobler(1992) that resulted from an investigation into the "design of a multifactorial evaluation system for teachers in the secondary school". A structured questionnaire was completed by 1120 teachers and upon analysis of the data two factors emerged namely:

- Factor one that was named "design criteria; and
- Factor two that was named "implementation criteria" (Grobler, 1992:198).

These two groups of criteria will be used throughout and the present system of performance management (PM) which is part of the "Integrated Quality Management System (IQMS), will be subjected to these criteria in order to make an informed decision as to whether this programme can be used to improve a teachers work performance (Manual for the IQMS, 2005) as an aspect of quality assurance.

Before designing any performance evaluation system there are certain questions that need to be answered. The first question is aimed at clarifying the confusion that exists with respect to appraisal, evaluation and measurement.

**Is it appraisal, evaluation or measurement of teacher performance?**

No matter how one defines the above terms they reflect having to evaluate the teachers work performance through a process of decision-making and judgment. The authors believe that the word appraisal come from to “praise” (to express warm approbation) in an effort to make teacher evaluation more palatable. Common synonyms for appraisal are assessment, estimation and evaluation.

Sergiovanni and Starratt (1993: 211) provide a useful analogy to enable one to distinguish between evaluation and measurement. Suppose you wanted to buy a kilogram of apples. The unit of mass namely the kilogram is the same the world over and one kilogram of apples in South Africa would be the same as in South America. No matter who measures the mass the result using the same mass meter is likely to be the same. However, in the process of determining the mass of one kilogram of apples the standard and the measuring device are more important than the person doing the measuring. Ideally measurements should be “personproof” in the sense that no matter who does the measuring, all should come to the same conclusion. The reliability between the various “measurers” is highly valued. Thus in measurement-orientated evaluation systems the role of the evaluator is diminished. The principals and supervisors are less important than the instruments and procedures they use (Sergiovanni & Starratt, 1993:211).

Evaluation by contrast is a distinctly human process that involves discernment and making informed judgments. Evaluation is never value-free or context-free. In our example of the apples, having decided on the one kilogram your choice would have been informed by colour, texture and taste. Should the apples be sweet, sour, mealy or firm? Do you prefer red, yellow or green? Here it is not the measuring instrument that counts so much but the person doing the evaluation

that is important. Evaluation is a distinctly human rather than a mechanical approach (Sergiovanni & Starratt, 1993:211).

A further problem is that the instruments used when evaluating human work performance are not nearly as accurate as scales for determining mass. Hence you will see all kinds of efforts made to standardize the instruments in order to standardize the decision-making and so minimize the human process of making an informed judgment (see 12.3 to 12.5 in manual for IQMS, 2005). One always needs to remember that you are attempting to measure the invisible and hence you are dealing with the subjective side of measurement. How do you measure a teacher's thinking pattern if it is invisible? The truth is that we design a construct in order to observe that behaviour that we think results from certain thought patterns using a scale of some kind that is not very accurate. At the very best we can only obtain an estimate and that depends on issues of credibility amongst others (Sergiovanni & Starratt, 1993: 215-217).

Whether you appraise measure or evaluate human performance when you have to decide whether performance is good, average or poor you are making a human judgment and that is essentially evaluation. Thus we will use the term evaluation when determining the work performance as an aspect of quality assurance of teachers or educators.

The next issue to be discussed in performance evaluation is the standards or criteria that are needed against which we can design a performance evaluation system.

### **The design criteria**

When systems that have to evaluate human performance are designed there are certain standards or criteria that need to be considered. Whether or not the system meets the criteria can best be ascertained by asking numerous

questions. The first question relates to the steps that should be present when evaluating teacher performance.

### **What steps are involved in teacher evaluation?**

Evaluation is an integral part of the control process and the following steps are involved:

- Setting performance standards, -criteria or –norms.
- Observation of the work performance and obtaining information or data about it.
- Evaluation of the work performance using a process of decision-making and judgment.
- Providing feedback about the work performance with the application of corrective steps if necessary.

These steps can be used to come to a definition of teacher evaluation.

### **What is teacher evaluation?**

“Teacher evaluation is a function of human decision-making resulting from a value judgment about how good or weak a particular work performance is using information that compares the actual work performance with predetermined performance standards and that is followed by feedback to the teacher about how good or weak the work performance is” (Grobler, 1993:92; Manual for IQMS, 2005, Section C:10-36).

It should thus always be remembered that teacher evaluation is normative in nature because a value judgment is given. This value judgment must be weighed against definite criteria of fairness and should always fulfil a certain function.

**What are the functions of teacher evaluation?**

The potential purposes of teacher evaluation can be multifarious and hence it is necessary to specify the purpose beforehand. Teacher evaluation can fulfil the following functions namely:

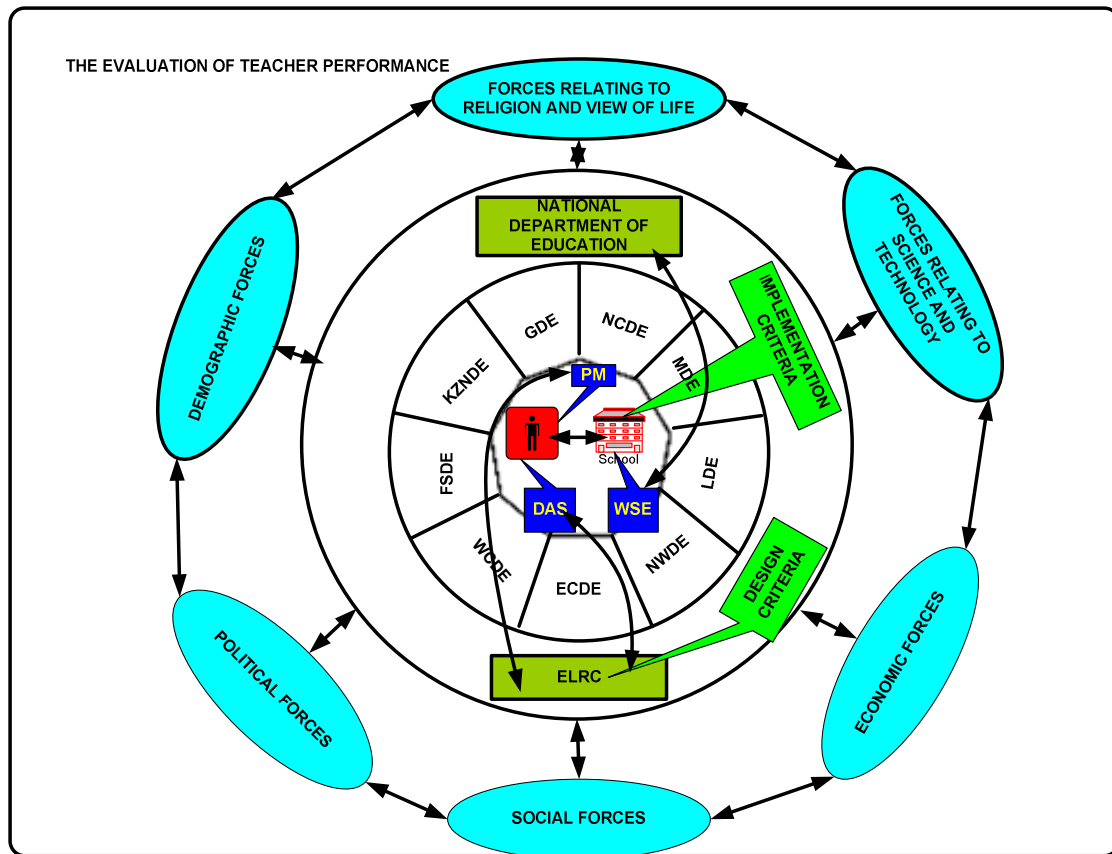
- A formative function for the development of professional teaching skills
- A summative function for selection and as a basis for grading and promotion
- A socio-political function such as providing motivation in order to improve teacher effectiveness or to promote certain preferred teaching actions.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

The socio-political and administrative functions do not belong with responsible determination of work performance and as such they do not belong with teacher evaluation.

The model provided in Figure 1 clearly indicates that teacher evaluation is part of a system which means that one cannot change one part of a system without influencing other parts in some way. Also the forces present continually influence the system in some or other way.

The model further indicates a severe shortcoming in most teacher evaluation systems throughout the world and that is that the design and implementation of an evaluation system are seen as two separate things. So it is in order to design the system in “heaven” and then to implement it “on earth”. The school should be seen as both “heaven and earth” and hence any teacher evaluation system needs to be designed and implemented in the school. It should not be designed by so-called experts who have long since retired from the classroom and now sit in the comforts of “heaven” where they act as “angels” who design the system. The problems of any evaluation system arise when it has to be implemented in the classroom back on “earth”. It is not logical to design and implement something in two different places as the system needs to be seen as a whole.

The IQMS system was designed by the ELRC together with the National Department of Education (heaven) using minimal teacher input via teacher unions. At the level of the school (earth) the principal and the “School Development Team” (SDT) together with the “Development Support Group” (DSG) have to implement this performance measuring instrument. Very few of them will have been involved in any way, in the design and after minimal training (if any) by officials who have little knowledge of performance management.



**DIAGRAM 1: THE TEACHER EVALUATION SYSTEM**

The next question that arises is where does one find the information needed to determine the effectiveness of a teachers work performance? The logical place to look is probably to be found in the various dimensions of a teachers work environment.

**Where can the information be found that is needed to judge the teacher's work performance?**

There are numerous directions of thinking when it comes to what aspects of a teachers work are important? Teacher evaluation should thus always take place within a given community culture or combined paradigm as each evaluation community has an own evaluation framework and a particular way of determining what information is needed when determining teacher effectiveness.

For example, the process-product paradigm proponents are of the opinion that certain processes, that are mainly to be found within the teacher him- or herself, are responsible for learner achievement. Thus it is the teacher's:

- particular personality characteristics, or/and the
- direct teaching behaviours, or/and the
- classroom management techniques, or/and the
- better use of time when completing a task

that determines a learners academic performance. It is especially the learning of basic skills in reading, arithmetic and mathematics that make use of direct teaching methods as advocated by the process-product paradigm. Unfortunately most of these direct teaching behaviours as well as the classroom management techniques are directly observable making them easier to measure. The danger thus exists that they may be overemphasized in the design of an evaluation instrument and this will force teachers into using a more directive teaching style. The **lesson observation instrument** of the IQMS (Manual for IQMS, Section C, 2005:10-19) for example has four performance areas namely:

- The creation of a positive learning environment.
- Knowledge of the curriculum and learning programme.
- Lesson planning, preparation and presentation.
- Learner assessment.

Each of the above areas has four sub-areas. Most of these areas and sub-areas would probably be classified under the process-product paradigm. What about the part that the learner him-or herself plays in the learning process?

The belief that the learner is personally responsible for his/her own achievement led to the process-product mediation paradigm that believes that student insight into the learning content is the result of social activities that occur in the classroom and the active cognitive assimilation by the learner him-or herself. Insight into the learning content involves both cognitive and affective processes and data about a learner's thought processes is obtained by noting what other pupils have to say. A learner's affective experiences in the classroom are also influenced by the way discipline is maintained in the classroom, how pupil involvement is obtained and by the amount of positive expectation that is present. There is also a paradigm that believes that it **is the teachers' thinking processes** that influences the learning process of the learners.

The teacher's invisible thought processes belongs to the teacher decision-making paradigm. This school of thought believes that learner achievement is, amongst other things, the result of the teachers thought processes before, during and after a lesson. This paradigm makes use of the teacher's reflective thinking of why he/she chose a particular action during a lesson. Allowing the teacher to reflect about the particular choice brings the teachers' thought processes to the surface and allowing researchers to analyse it more critically. The IQMS has an area called "Decision-making and accountability" (Manual IQMS Section C:29). This section, however, deals with the amount of participation that is allowed in decision-making and has nothing to do with the teachers thought processes about choosing a particular teaching strategy.

Excellent teachers are usually characterized by having an exceptional ability to present a subject in a stimulating way. This evaluation paradigm believes that

learner achievement is mainly the result of the teacher's particular knowledge of a:

- subject or learning area,
- education, and
- different ways of presenting the curriculum.

There is also the classroom as ecological system paradigm which believes that the teacher's effectiveness cannot be found outside of the context of the community, family, school and classroom. Information about the learners' work performance must be sought in the ecosystem of the school. Examples are to be found in the school's particular climate and culture.

To summarize, information about teaching performance is found in the following combined paradigms:

- The process-product paradigm.
- The process-product mediation paradigm.
- The classroom ecological paradigm.
- The decision-making paradigm.
- The excellent teacher paradigm

In an attempt to make the various paradigms amenable to measurement they need to be grouped into variables.

### **What variables are involved in determining teacher effectiveness?**

Every particular paradigm has its own sections that are used to search for the information needed to determine the effectiveness of a teacher. Every section in turn has numerous variables that can be used in an attempt to measure teacher effectiveness. The grouping as used by Grobler (1993: 94-96) will serve as a basis for naming certain categories namely:

- Preoperational variables
- Contextual variables
- Process variables; and
- Product variables.

A possible combination of categories, evaluation paradigms and variables to be used is provided in summarised form in Table 1.

**TABLE 1: VARIABLES INVOLVED IN TEACHER EFFECTIVENESS**

| <b>CATEGORIES</b>     | <b>EVALUATION PARADIGM</b>   | <b>VARIABLES</b>  |
|-----------------------|--|---|
| <b>Preoperational</b> | Teacher characteristics-<br>Aspects of the personality                                   | Health and vitality; Intellectual ability; Assertiveness; Good decision-making ability; Commitment to the teaching profession; Maturity; Originality; Fairness; Integrity and responsibility; Courage |
|                       | Exceptional teacher –<br>knowledge of subject and of<br>education                        | Academic and professional qualifications; Teaching experience; Professional development; Involvement with teacher unions; Extra-mural involvement   |
|                       | Teacher decision-making –<br>educational framework                                       | Expertise as implementer of the curriculum; Task and vocation as a teacher; Task and role of the learner; Involvement with parents; Relationship with learners; Life and world view.                  |
| <b>Contextual</b>     | Classroom ecological paradigm – including the learner insight into learning content- the | School culture; School climate; Classroom climate; Socio-economic status of learners; Support services  |

|                |  |   |
|----------------|--|---|
|                | learner social mediation approach.   | provided; Learner teacher ratio;<br>Efficient use of time   |
| <b>Process</b> | Process-product- direct teaching actions   | Review and control of homework;<br>Lesson presentation; Learner accompaniment; Feedback with necessary adjustment; Individual exercises; Weekly and monthly revision.   |
|                | Process-product- Classroom management actions (including effective use of academic time) | Management style (Task and Relationship orientation). Elements of management (Planning, organizing, leading and control); Management instruments (Decision-making, motivation, communication, delegation, disciplining, relationship building); Management strategies (Meetings, group techniques, climate creation, interviewing). |
|                | Process-product mediation- cognitive mediation( on the part of the learner)              | Perceptions(self concept, ability to concentrate, acceptance of responsibility); Learning strategies (listening, use of textbook' use of other sources of information, use of time, other methods to facilitate learning)   |
|                | Teacher decision-making – lesson planning  | Important factors (Planning, introduction, learner involvement, structuring, discipline, feedback, closure)   |
|                | Teacher Interactive thinking   | Strategies to enhance achievement;<br>Pre-knowledge; Ability to simplify;   |

|                |  |  |
|----------------|--|--|
|                |  | ability to adapt; Reflective thinking;<br>Use of questionnaires to obtain the opinion of others.   |
|                | Exceptional teacher -<br>knowledge about the curriculum and presentation thereof | Techniques to maximize presentations (Structuring; variety; use of learner leaders; study guides; feedback, high achievement standards)  |
| <b>Product</b> | Process-product  | Levels of achievement(Academic and extra-mural); Personal development levels of learners; Absentee figures; Holding power of the school; Quality of school-community relationships; Work satisfaction of learners; Quality of classroom climate, school climate and school culture |

It has already been mentioned that the direct teaching behaviours and the classroom management activities are especially susceptible to incorporation into evaluation instruments. Such an evaluation instrument will contain an excess of observable teaching activities and discourages teaching activities aimed at the higher cognitive abilities.

As far as the IQMS system is concerned no direct mention of evaluation paradigms or variables can be found. Instead this system makes use of performance standards where the standard seems to be like a “flag that sometimes distinguishes one cavalry regiment from another one”. In this sense it is like a performance area which in turn may have sub-areas. It is thus confusing as standard normally means “a measure to which others conform or by which the accuracy of others is judged”. So if the par of a golf course is 72 then you have a standard to which you need to conform. If you go around the 18 holes in 70 then you have done better than par!

The IQMS system contains a performance measurement instrument (PM) for teacher evaluation and consists of two parts. One part (made up of four Performance Standards) is used for the **observation of educators in practice**. The other part (made up of eight Performance Standards) is related to aspects for evaluation that fall **outside of the classroom**.

The first part namely the lesson observation instrument is designed for observation of educators in practice for Developmental Appraisal, Performance Measurement and Whole School-Evaluation (external).

**This part of the instrument consists of four Performance Standards namely:**

1. The creation of a positive learning environment
2. Knowledge of curriculum and learning programmes
3. Lesson planning, preparation and presentation
4. Learner assessment

**The second part is for aspects outside of the classroom.** This part of the instrument is designed to evaluate the performance of educators with regard to aspects outside classroom and consists of eight performance standards namely:

5. Professional development in field of work/career and participation in professional bodies.
6. Human relations and contribution to school development.
7. Extra-curricular and Co-curricular participation.
8. Administration of resources and records.
9. Personnel.
10. Decision making and accountability.
11. Leadership, communication and servicing the governing body.
12. Strategic planning, financial planning and EMD.

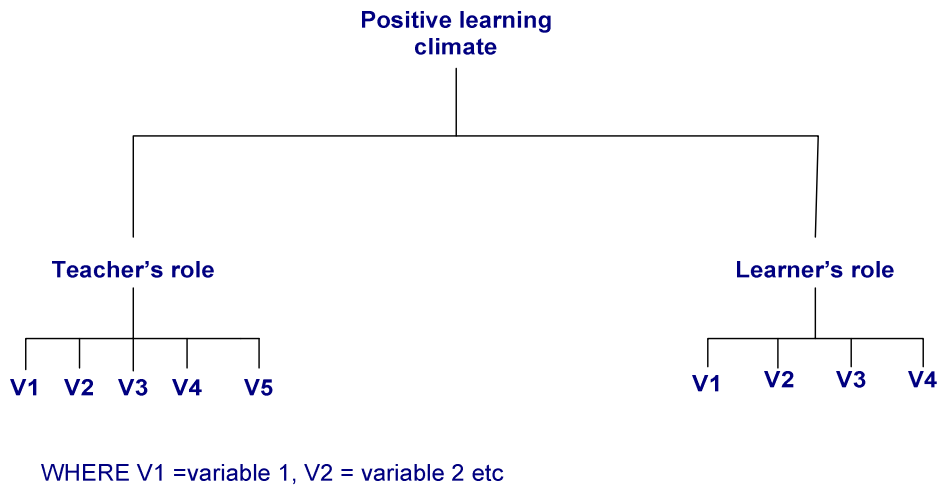
These eight (8) performance areas are at least all to be found in the teachers work environment but certain areas in the administrative aspects seem to be over-represented. If one should, for example take the first performance area namely” The creation of a positive learning climate” and you had to list those aspects that you think should feature in a positive learning climate, then a wide range of aspects would probably be considered. If you believed that **the teacher** was the most important influence in learning achievement then you would probably list aspects such as:

- The academic achievements of your students in external examinations.
- Thorough lesson preparation and stimulating presentation
- Learners need to be accompanied until they show insight in the work.  
Active participation of learners is thus important
- Provide corrective feedback to your questions
- Provide sufficient exercises to practice content and skills until saturation is achieved while actively controlling the work
- Provide systematic revision and test academic achievement regularly.

If you, however, believed that **the learner** is the most important part of the learning process and that the learner must always first compare new knowledge with acquired knowledge before accommodating it in his/her framework then you would probably list aspects such as:

- The learner must be able to use time effectively
- Learning is the result of efforts by the learner him-or herself
- Learning strategies that improve learner achievement are important
- The way the teacher achieves learner participation is important for example recognition, positive expectations and learner discipline are important. Thus the social context of the classroom is important.

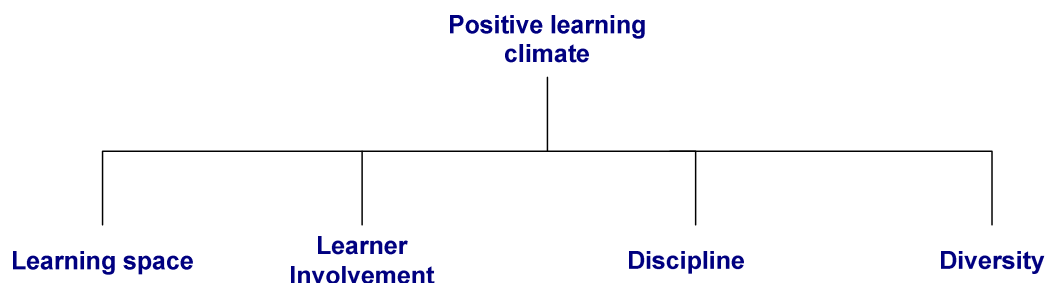
A diagram of the variables that you may have identified could clarify matters. For example, if you have identified 20 variables in the teacher's role and 10 in the learner's role. This process for some of the variables is illustrated in figure 2.



**Figure 2: Some of the variables present in a positive learning climate.**

In the IQMS system each so-called Performance Standard includes a number of Criteria. Perhaps they should be called sub-areas because a criterion is a standard a thing is judged by. To qualify to run in the Olympic Games in the 100m one would, for example, have to meet a criterion of say 10 seconds.

The IQMS system where Performance standard 1 is “The creation of a positive learning climate” there are four criteria and it could be presented as:



The criteria are thus analogous to what we called variables before. They appear to this writer to be more like sub-areas of the positive learning climate and now one would need to identify various variables under each of the four sub-areas. Are the four sub-areas above the most important aspects in a positive learning environment? Your answer would obviously depend on which evaluation paradigm you prescribe to. There does, however, not appear to be enough emphasis on the role of the learner in the creation of such a climate. One could also question why “diversity” features as an aspect. Indeed what aspect of diversity are we talking about?

The IQMS then proceeds to provide so-called descriptors for each criterion. These descriptors seem to the writer to be nothing more than prescribed standards or criteria which are used to judge the teacher with. For example, the “learning space” is circumscribed by four descriptors that vary from unacceptable to outstanding. These descriptors come from a rating scale namely (IQMS Manual, 2005, Section C: 4):

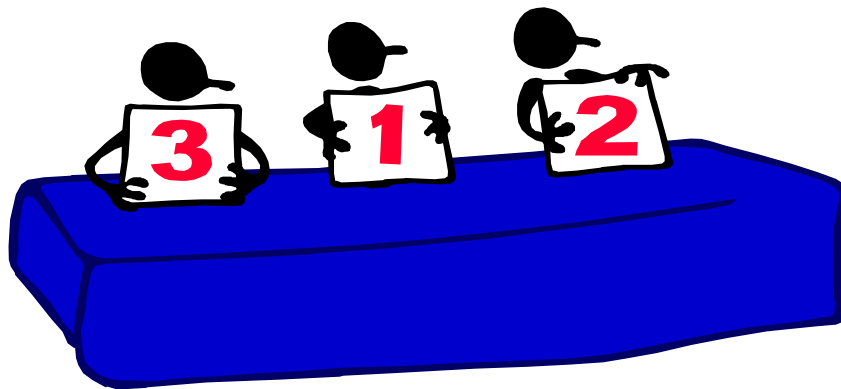
- Rating 1: Unacceptable. This level of performance does not meet minimum expectations and requires urgent interventions and support.
- Rating 2: Satisfies minimum expectations. This level of performance is acceptable and is in line with minimum expectations, but development and support are still required.
- Rating 3: Good. Performance is good and meets expectations, but some areas are still in need of development and support.
- Rating 4: Outstanding. Performance is outstanding and exceeds expectations. Although performance is excellent, continuous self-development and improvement are advised.

So every so called criterion has four descriptors namely unacceptable, satisfies minimum requirements, good and outstanding. We will say more about the scale

used later but suffice here is to say that Sergiovanni and Starratts' comments of "person-proof" are most apt. The person doing the evaluation must work within the prescribed parameters of the descriptors and perhaps a better word would be "prescriptors". It should be obvious to the reader that the most sensitive issue surrounding teacher evaluation are the criteria that should be used to make the variables more concrete and hence measurable.

### **What criteria must be used to judge the quality the work performance?**

Even if the performance criterion is provided by evaluation experts, a value judgment still has to be made as to what extent the proposed criterion or standard meets the real work performance. Thus three judges evaluating a diving competition may all evaluate it differently as shown in the sketch below:



**Figure 3: Judging a performance according to prescribed criteria (after comparing that which you see –the real – with that which you expect – the ideal)**

The sketch clearly shows that the criteria are subjective as the score varies according to what each judge has decided.

### **Criteria can be subjective and objective**

A criterion is a standard, measuring-rod or test that can be used to judge a performance.

Consider the example of a mother who tells her daughter that she had a visitor this afternoon and even if she did not know him well it appeared as if he was well educated because he was neatly dressed and his use of language was exquisite. Neatly dressed and exquisite use of language was the mother's criteria for well educated. A value judgment (he is well educated) was made using certain criteria (neatly dressed and exquisite use of language). The problem is that different people use different criteria and the above visitor could have been judged totally different by another person. Even if the criteria are provided beforehand the judgment could still be different as is clearly illustrated by the three judges who judged the diving performance. Objective criteria, on the other hand, do not involve another person's evaluation. A par of 72 on a golf course is the same for all persons playing on that course and is interpreted as such.

The majority of product variables (see Table1) can be expressed in objective terms and as such this category of variables can be represented by objective performance criteria. Many of the pre-operational variables (those variables that are already part of you and which you take into the classroom as part of you) and process variables (process of teaching) need standards that are based on human judgment. These variables can thus be represented by subjective performance criteria. The quality of a teachers work in South Africa is determined via a process called performance management.

### **Performance management as an aspect of the IQMS in South Africa**

As far as the IQMS system of teacher evaluation is concerned it has already been indicated that the term variable is not used. Each evaluation area is called a performance standard and each performance standard has a number of criteria which in turn have descriptors. For example the first performance standard and its criteria would be:

#### **Performance Standard: 1. CREATION OF A POSITIVE LEARNING ENVIRONMENT**

**CRITERIA: (a) Learning Space; (b) Learner Involvement; (c) Discipline; (d) Diversity**

Each criterion and their descriptors are given in the table below:

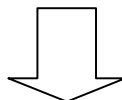
| <b>Performance standard</b>                 | <b>Criteria</b>     | <b>Descriptor</b>   |
|---|---------------------|---|
| Creation of a positive learning environment | Learning space      | <p><b>1 = Unacceptable</b></p> <ul style="list-style-type: none"> <li>▪ No effort to create a learning space that is conducive to teaching and learning. Organization of learning space hampers teaching and learning.</li> <li>▪ Educator and learners appear <b>uninterested</b>.</li> <li>▪ <b>No discipline</b> and much time is wasted. Learners do not accept discipline or discipline is experienced by learners as humiliating.</li> <li>▪ Educator is <b>insensitive</b> to racial, cultural and/or gender diversity; does not respect dignity of individual learners' or groups of learners.</li> </ul> <p><b>2 = Satisfies minimum expectations</b></p> <ul style="list-style-type: none"> <li>▪ There is evidence of an attempt at creating <b>and</b></li> </ul> |
|   | Learner involvement |   |
|   | Discipline          |   |
|   | Diversity           |   |
|   | Learning space      |   |

|  |   |   |
|--|---|---|
|  | <p>Learner involvement</p> <p>Discipline</p> <p>Diversity</p>                       | <p><b>organizing</b> a suitable learning environment, which enables individual and/or group learning.</p> <ul style="list-style-type: none"> <li>▪ Learners are <b>engaged in appropriate activities</b> for most of the lesson.</li> <li>▪ Learners are <b>disciplined</b> and learning is not interrupted unnecessarily.</li> <li>▪ Learning environment is <b>free</b> of obvious <b>discrimination</b></li> </ul>   |
|  | <p>Learning space</p> <p>Learner involvement</p> <p>Discipline</p> <p>Diversity</p> | <p style="text-align: center;"><b>3 = Good</b></p> <ul style="list-style-type: none"> <li>▪ <b>Organization</b> of learning space enables the effective use of teaching resources and encourages and supports individual and group activities.</li> <li>▪ The environment is <b>stimulating</b> and the learners participate actively.</li> <li>▪ Learners are encouraged; there is <b>positive reinforcement</b>. Learners accept discipline without feeling threatened.</li> <li>▪ Educator <b>acknowledges</b> and <b>respects</b> individuality and diversity.</li> </ul> |

|  |   |   |
|--|---|---|
|  | <p>Learning space</p> <p>Learner involvement</p> <p>Discipline</p> <p>Diversity</p> | <p><b>4 = Outstanding</b></p> <ul style="list-style-type: none"> <li>▪ <b>Organisation</b> of learning space shows creativity and enables all learners to be productively engaged in individual and cooperative learning.</li> <li>▪ Learners participate actively and are encouraged to <b>exchange</b> ideas with confidence and to be creative.</li> <li>▪ Learners are motivated and <b>self-disciplined</b>.</li> <li>▪ Educator uses <b>inclusive strategies</b> and <b>promotes</b> respect for individuality and <b>diversity</b>.</li> </ul> |
|--|---|---|

The learning standard above (an evaluation area) has four criteria (sub-areas) and each criteria has four descriptors. If you, for example, believe that the teacher should be rated as a two (2) for learner involvement, then the learners should have been engaged in appropriate activities for most of the lesson. Thus on the performance standard “Creation of a positive learning environment” a teacher can obtain a maximum of 16 and a minimum of 4. As the **first seven performance standards apply** to all educators the following scale is possible:

|   |   |   |   |
|---|---|---|---|
| 1 | 2 | 3 | 4 |
|---|---|---|---|



(X 28)

28

56

84

112

The following composite score sheet for use in performance measurement for pay progression and grade progression for level 1 educators' (28 criteria) serves as an example:

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

Scores and appropriate percentages are provided by the following table (IQMS Manual, 2005: Exemplar C – Quality management system rating scale)

| <b>Percentage</b> | <b>Raw score</b> |
|-------------------|------------------|
|                   | <b>Level 1</b>   |
| 100               | 112              |
| 90                | 101              |
| 80                | 90               |

|           |           |
|-----------|-----------|
| <b>70</b> | <b>78</b> |
| 60        | 67        |
| <b>50</b> | <b>56</b> |
| 40        | 45        |
| 30        | 34        |
| 20        | 22        |
| 10        | 11        |
| 0         | 0         |

To qualify for **salary progression** the educator needs to obtain: 56 (2)

To qualify for **grade progression** the educator needs to obtain: 78 (3)

#### **WHAT PERCENTAGE OR RAW SCORE CONSTITUTES EACH OF THE LEVELS OF PERFORMANCE**

**RATING 1: UNACCEPTABLE: Below 50% (56)**

**RATING 2: SATISFIES MINIMUM EXPECTATIONS: 50% and over (56)**

**RATING 3: GOOD: 70% and over (78)**

**RATING 4: OUTSTANDING: 85% and over.**

The performance measurement instrument appears to be designed according to the tenets of a performance-anchored grading scale. As such it suffers from the same shortcomings the most noticeable of which is the scale. Unacceptable and outstanding are hardly logical opposites of one another and hence the scale is not acceptable to start with. More disconcerting is the fact that the units are probably never equal yet ratings are made. The designers of this system have attempted to design the subjective attempts of human decision-making out of the management of the system. By attempting to make the instrument person-proof

one falls into the trap of being subservient to the evaluation system and hence bureaucratic accountability which seeks to ensure that teachers measure up to some predetermined uniform standard, takes over. Professional accountability that implies a consistent improvement in practice disappears out the back door and growth does not occur (Sergiovanni & Starratt, 1993: 204).

From the discussions above it should also be obvious that the criteria cited for performance effectiveness are an artifact of how the researchers decided to define performance effectiveness. Had they defined performance effectiveness differently different criteria would have to be used. The criteria used are thus **not independent or objective but a function of human decisions.**

If we attempt to design the evaluation system to be person-proof raters or evaluators still vary in their ratings. An evaluator's mood, biases, attitudes or relationship with the person being evaluated can result in widely differing performance evaluations. In fact most evaluation systems are cumbersome, with simplistic rating categories and the bureaucracy and vast amounts of red-tape and paper work make the evaluation an ordeal! (Spangenberg, 1994: 6). The design of a performance measurement system is of critical importance. No matter how well the system has been designed, poor implementation will result in failure.

### **Who must evaluate teacher performance?**

A teacher's work performance can be evaluated by the following persons namely:

- The teacher's immediate superiors such as the education specialist/Head of Department (HOD) or principal where there is no HOD (Manual for IQMS 2005, Section A:10).
- A teachers colleagues.
- A teachers clients such as the learners.
- By him-or herself (self-evaluation).

An extremely important aspect of teacher evaluation is the ability to provide feedback. It is easy to reveal teachers strong teaching actions but the revelation of certain weaknesses in a teacher's armory is never a pleasant task.

### **How must feedback of performance evaluation take place?**

Feedback can become more effective by:

- Developing a flexible trust relationship as this encourages conversation and supports the teacher to talk about his/her own work performance.
- Cultivating good listening skills like the elimination of prejudice, undivided attention, an ability to see that which is common and the use of positive body language can all, lead to a relaxed discussion climate which facilitates the disclosure of evaluation information.
- Cultivating aspects such as good interpersonal relationships, credibility as an evaluator, being a positive role model, having personal integrity, being objective and developing a good understanding of the context of teacher evaluation as they are all aspects that belong to the framework of the connoisseur of teacher evaluation.
- Always giving feedback about the positive work performances and then gradually move to the areas where improvement is needed.
- Developing aspects such as the use of well thought out questions and empathetic listening skills in order to ensure that the teacher obtains a self insight into his/her teaching weaknesses.
- Setting combined improvement aims and fixing a date for a follow-up interview.

Regarding the IQMS system (in Section A on p.10 of the manual ) the evaluator is:

- An educator (Level 1) by Education Specialist/Head of Department (HOD)  
or
- Principal where there is no HOD.

- Head of Department/Education Specialist (Level 2) by Deputy Principal or Principal.
- Deputy Principal by Principal
- Principal by Regional/District/Area Manager or his/her delegate.

The IQMS system thus goes into great detail with respect to implementation of the evaluation instruments. Self-evaluation is an inherent part of the system and teachers are actively involved via SDT, DSG, PGP and SIP. It seems as if the measuring instrument is being elevated to the most important aspect of the evaluation process whilst it is the evaluator's judgment that should give meaning to the process. The work of teachers' appears to be controlled by the approved script provided creating large volumes of paper work. (Sergiovanni & Starratt, 1993:62).

A summary of the implementation criteria within the evaluation system follows:

### **The implementation criteria**

The diagram on performance evaluation clearly shows that the implementation takes place within a system and should not be seen as an isolated step. The school is the place where implementation occurs. It is emphasized that the design should also occur there. When systems are designed at one level and implemented at another level (as is the case for the IQMS), then when problems arise or performance fails to live up to what was intended, it is easy to find someone or something to blame. The fault may, however, lie in the system. The system needs to be advocated over time.

### **Advocacy of the evaluation system**

With respect to the IQMS system advocacy must address the issues relating to the purposes of the three programmes, DAS, PMS and WSE. The focus should be on quality education for all, transformation and the advantages for educators, schools and the system as a whole. It should also address the relationships

between these three programmes and how they should inform and strengthen one another in an integrated system (IQMS Manual, 2005, Section B:20).

The problem with advocacy is that the people responsible for advocating the system operate in “pure advocacy”, tend to selectively use data that confirms their position (Senge, 1990:200). Advocacy needs to be combined with enquiry. People must be allowed to enquire into an expressed view. By balancing advocacy with enquiry, you are showing people that you are willing to expose the limitations in your thinking, accepting that more than one point of view exists, especially when controversial things like teacher evaluation is implemented.

The ideal of combining advocacy and inquiry is especially challenging when working in highly political organisation that is not open to genuine inquiry. Genuine inquiry is a term that is promoted by an integration of participative and reflective openness. Participative openness, the freedom to speak one’s mind, is the most commonly recognised aspect of openness (Senge, 1990: 227). However, if after stating our opinions, we do not agree and a decision representing the group must be made, the decision represents either a watered down “consensus” or the preference of one or two whose opinions count most. Reflective openness, the willingness to challenge ones own thinking is also required. Reflective openness recognises that the only certainty we ever have is, at best, a hypothesis of the world. Thus the attitude needed to integrate participative with reflective openness is “I may be wrong and the other person may be right”. However, the pressure of party politics makes it extremely difficult for the individual to express their unique opinion. The political metaphor thus emphasises that party political goals may be rational for some people’s interest but not for others. It is thus unlikely that one would find any Departmental official tasked with implementing the IQMS system openly admitting its shortcomings because political pressure supercedes the education agenda.

### **The function of the evaluation system must be clearly stated**

The problem with teacher evaluation is that the real character or being lies in the potential use of the system. The main aim should always be the professional development of the teacher's effectiveness. The evaluation process must involve the teacher in totality.

Professional development is best served using by formative evaluation that occurs on a continuous basis. Formative data that has been collected on a continuous basis can be used to come to a summative valuation about a teacher's effectiveness. Thus there could be:

- a formative evaluation system that continuously evaluates beginner- and temporary teachers so that developmental opportunities are created;
- a formative evaluation system that uses the data to come to a summative conclusion for grading and promoting permanent teachers.

The IQMS system provides ample opportunity for both the above suggestions (see IQMS manual, Section B, 2005: 21-30).

### **Evaluation competences**

Of crucial importance in the implementation process are the evaluator competencies needed; summarised as:

- good interpersonal relationship skills;
- being a positive role model;
- credibility as an evaluator by showing an openness for other peoples points of view and by providing honest and constructive criticism in the knowledge that the information obtained during evaluation is confidential;
- personal integrity;
- objectivity;
- knowledge and understanding of the process of evaluation;
- patience and flexibility;

- the ability to avoid stereotyping and initial impressions.

The feedback process is a further competence that the evaluator needs within his/her evaluation framework.

### **The feedback process**

Some feedback skills that could improve the effectiveness of work performance are:

- an attempt to develop a flexible relationship of trust as it encourages dialogue;
- pay careful attention to your listening skills;
- always give feedback about positive performance achievements first;
- use well thought out questions so that the teacher tells you about his/her weaknesses without you having to mention them;
- set combined improvement goals and make sure that the teacher receives the necessary training to overcome his/her weaknesses;
- pay continual attention to the conceptual skills that are needed for promotion posts.

Both the design and the implementation criteria should receive equal attention when considering a teacher evaluation system. To assist designers in this regard 41 items can be found in the thesis of Grobler (1993: 199-200). These items asked 1120 teachers their perceptions about the importance that they attached to these items. All the evaluation paradigms were involved and designers of evaluation systems can find useful information here. A similar argument can be made out concerning the implementation criteria where 19 items are suggested (Grobler, 1993: 202).

Although the IQMS system was implemented in 1995 the criteria as given by Grobler (1993) are also relevant as they can be used as standards whereby teacher evaluation instruments can be judged. Both the design and

implementation criteria are aspects that all school principals should be aware of as principals play the most vital role in measuring the work performance of teachers.

### **The role of the principal in the implementation of IQMS in a changing environment**

Although IQMS was only officially implemented in 2005, research on developmental appraisal and whole school evaluation as major components of IQMS has already been conducted. Research undertaken by Pillay & Molapo (2002;) reveal some of the challenges that principals face in the management of the IQMS process. The research was done in the Gauteng, North-West and Mpumalanga provinces of South Africa. Both researchers used the quantitative design utilising the SPSS 13.0 programme to do a factor analysis and then to point out statistically significant differences between the factors and other variables (Cohen; Mannion & Morrison, 2002).

### **The role and responsibility of the principal in the implementation of IQMS**

The principal has the overall responsibility to ensure that the IQMS is implemented uniformly and effectively at the school providing every educator with a copy of IQMS documentation and as a member of the SMT, s/he is responsible for advocacy and training at school level. The SMT must organise a workshop on IQMS where individuals will have the opportunity to clarify areas of concern. After advocacy and training the principal will facilitate the establishment of the SDT in a democratic manner and ensures that all documentation sent to the District office is correct and delivered in time. The principal is responsible for internal moderation of evaluation results in order to ensure fairness and consistency. Together with the SMT's the principal must inform educators of the in-service education and training (INSET) programmes that will be offered and make the necessary arrangements for educators to attend.

The principal is to ensure the broad planning and implementation of IQMS as well as to ensure that school self-evaluation is done in terms of the WSE policy and in collaboration with the SDT. The SDT is made up of the principal, the WSE co-ordinator,

democratically elected members of the school management and democratically elected post level 1 educators. The school should decide on the size of the SDT, (up to 6 depending on the size of the school). In schools with only one or two educators such educators make up the SDT but the District office provides the support. The above roles is specifically allocated to the principal, including his/her role in the SMT and the SDT.

### **Findings from research**

Besides the previous suggestions made regarding the design and implementation criteria it is clear that contextual/ situational factors in the diverse South African community must be taken into consideration when training principals to drive the process of IQMS. The following aspects should receive more attention when IQMS are implemented:

- Internal factors: These refer to factors which are found within the school itself, some of which are, the functioning of the school, physical classroom conditions, class size, lesson content, language factors and school discipline
- External Factors: These refer to factors which are found outside of the school some of which may be, family environment factors, political, cultural, socio-economic and education administrative factors.

Furthermore factors affecting effective teaching and learning received a high average mean score from the respondents of this research. These factors include:

- Educator to learner ratio in school;
- Provision of in-service training/support to educators;
- Physical condition of the classrooms where appraisal has to take place
- Available learner and teacher support material (LTSM);
- Level of learner discipline in schools;
- Level of nutrition of learners;

- Nature of school timetable/workload;
- Level of complexity of the learning area/subject taught by educators; and
- Personal health of the educator.

It is thus recommended that the IQMS instrument should make provision for contextual factors when appraisals are done. This will allow all panel members, including the principal, to set realistic expectations and focus on factors which are grounded in reality rather than theorized.

The school principal is responsible for the professional management of the teachers on the staff and is exposed to “parent voices” when they subjectively evaluate the teachers in the school. Parents do not have a direct role to play in the evaluation of a teachers work performance but rather their input is indirect via the “grapevine” and the school governing body (SGB).

### **Parent involvement and quality assurance at schools**

The South African Schools Act 84 of 1996 (SASA) stipulates that schools must have a governing body that is representative of all stakeholders. This is in keeping with the policy of democratic governance and the commitment to include parents as equal partners in education (Van Deventer & Kruger, 2003: 11, Coetzee & Bray, 2004: 51 and Potgieter *et al.*, 1997:7). The Act also encourages collaboration between the SGB, the school and the principal. The relationship should also be a supportive, with the SGB and parents supporting the school to provide quality education. However, the Act differentiates between governance and professional management. The SGB is responsible for the governance of the school while the professional management of the school is the domain of the principal. Many conflicts arise between the principal and school management team (SMT) with the SGB because the functions of these parties are not clearly defined and a thin line separates their functions.

The focus of this section of the paper is to assess the relationship between parent involvement and quality assurance at schools. The assessment of parental involvement is located within the WSE component of the IQMS. OFSTED (an external evaluation institution linked to the Department of Education) is responsible for evaluating the performance of schools as part of WSE. Mestry, (2004) and Jooste, (2005) attempted to establish how parent involvement could contribute to the management of effective schools.

The criteria that OFSTED uses in respect of parental involvement during WSE emphasises the role of the SGB but gives little recognition to parental involvement. The evaluation of parental involvement is restricted to the school's communication methods and how it improves links with the community. The criterion on whether the school provides any education for parents is vague. Providing adult basic education does not necessarily mean that there is a high level of parent involvement in schools.

Although parents do not have a direct role in teacher evaluation the assessment of parent involvement should be based on concrete criteria. Some of the criteria used by WSE evaluators to assess parent involvement appear to be vague, for example the SGB should develop systems for monitoring and evaluating the quality of education provided by the school. This will not be possible if the SGB has not been trained in drawing up and implementing monitoring tools. Effective communication does not necessarily mean that the number of newsletters and learner reports sent out by schools reflects effective communication. There is a need for in-service training for educators, in the practicalities of working with parents, some of it at a level of social skills and the presentation of information to groups of adults.

A genuine partnership with parents requires a substantial change in educator attitudes and practices. An in-service training and support programme should include the development of communication skills (written and verbal), parent-

educator interviews, involving parents in the curriculum, and other aspects of home/school relationships. This can be achieved through a coherent pattern of induction into the profession, supported and extended by further opportunities for development when in a permanent post, which is essential for both serving and intending teachers.

Besides the role that parents have to play in quality assurance the principal also needs to have knowledge of the part that school districts have to play in issues teacher quality assurance.

### **The role of school districts in the advocacy of effective quality assurance programmes**

Research conducted by Aheer and Mathye, (2006) and Ramaisa, (2004) will be used as a basis to explain the role of districts regarding quality assurance. The context for all three studies was rural and township schools in the three northern provinces of South Africa (Gauteng; Limpopo & Mpumalanga). One of the studies followed a generic qualitative research design with grounded theory elements in the analysis (Merriam, 1996) while the other two approached their studies quantitatively utilising the latest SPSS programme to do a factor analysis and then to point out statistically significant differences between the factors and other variables (Cohen; Mannion & Morrison, 2002).

The focus of this section is on the relationship between the school-based educators (SBE) - these include teachers at schools and the school management team; and the local district office with regard to the advocacy of "quality assurance programmes". It must be clearly stated that all three studies investigated the perceptions of the SBE and not the perceptions of the district officials.

### **The relationship between SBE and the district**

From the research done it is clear that the relationship between the SBE and the district is viewed by the SBE as problematic in the districts researched. The essential problem for the SBE is that district officials act in a manner to entrench the, according to the SBE, erroneous perception that they (the district officials) are in charge and hold a more powerful position than anyone at a school. Their actions demonstrate that they are empowered to tell (Hersey & Blanchard, 1993:192-193) the SBE what to do. The educators feel, in line with Hersey and Blanchard, that this type of behaviour may be effective when leading low maturity (unable and unwilling or insecure) subordinates, who lack both job skill and motivation which is clearly not the case for SBE.

The SBE indicated that they saw the role of the district officials as providing support during the implementation of quality assurance programmes by assisting in the determining of quality indicators for their schools and to provide constructive feedback on the proposed implementation plans (action plans) linked to the school's improvement plans (SIP) developed by the school in collaboration with the district. They objected to the autocratic telling style adopted by district officials in the strongest terms. They clearly feel that the district officials should, during the advocacy phase of the quality assurance programme, adopt a participating style (see Tannenbaum's participative leadership style, Tannenbaum & Schmidt, 1973: 161). The SBE feel that they were not at all involved in the formulation and design of the quality assurance programmes and that the programmes were communicated to them as a given ("This is now the law and you have to implement it").

An interesting finding out of one of the studies is that respondents generally agree that school districts do not provide sufficient support.

Another problem experienced by the SBE is that they feel they do not have enough freedom to implement the programme according to the local circumstances. They see the relationship as a power driven relationship, namely

that the district regards itself on a higher power level than the school staff and that whatever the district communicates to the schools must be seen as directives that have to be implemented with little room for adaptation in the local environment.

The following specific aspects were revealed by the research:

- Most of the SBE became aware for the first time of quality assurance programmes in the pipeline via the electronic and paper media and not from the district office. SBE felt strongly that they, as the professionals, who are to implement the programmes, should be the first to be informed before the general public, via the media, are informed.
- The problem of funding seems to be an aspect that impacts negatively on the relationship between the SBE and the district in the sense that any training opportunities by the district in the form of workshops are compulsory for school staff irrespective of whether the school can pay for the attendance from their own funds. It seems logical that if a workshop is compulsory the district should fund the attendance.
- One training opportunity that was planned for a week was reduced to three days because, as it was communicated to the SBE, that there was a lack of funds. Closer scrutiny however revealed that it was not a lack of funds but poor budgeting.
- The officials from the district, acting as facilitators during the workshop, were not competent to do the training. They were not able to answer the participant's questions and in some cases provided contradictory information to the participants.

- It was observed by participants that the relationship between the district and teacher unions (especially South African Democratic Teacher Union (SADTU)) seemed to be “unhealthy” because opposing views on aspects of the quality assurance programmes were communicated by the unions to the SBE. Clearly the unions and the districts were not in agreement on all aspects of the programme. These issues should have been sorted out in the liaison structures that do exist between Unions and Departments of Education (national and provincial), before the finalisation of the programme.

That district should be clear about their official role as quality assurers within the education system as a whole. They are not the gate keepers of the department but should be the source of support for schools. They should view the advocacy phase in the broadest sense to include all aspects between the design and the implementation of the programme.

The relationship between the district and the unions need clarification. Both role players should play a constructive role during the advocacy phase of the programme.

School districts should be more accountable in providing quality leadership and support to the schools under their jurisdiction to ensure the successful implementation of quality assurance programmes.

The school district officials must be held accountable for the performance of schools under their jurisdiction and there should be ways and means of measuring their performance. The school district staff needs to have clear job descriptions that will dictate their operation and help to measure their performance.

The importance of effective advocacy of a quality assurance programme for the successful implementation of these programmes should lead to the provisioning of sufficient funding for this process. The effective planning of the workshops should ensure the competent facilitators and sufficient time for the advocacy process.

## **CONCLUSION**

Any system of evaluation is only as good as the people who design and implement it. Teacher evaluation systems need to be designed and implemented in the place where learning occurs namely in the school. It is also obvious that if we introduce the IQMS which has been designed beyond the realm of each school, and is being essentially evaluated from outside the school, that dissonance could result.

The role of the principal in the implementation of IQMS is not as straight forward as it is spelt out in the policy documents. Principals need to study both the design and implementation criteria of teacher evaluation systems critically. They also need to take cognisance of the role that parents and the district have to play during quality assurance initiatives in schools.

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