

## Management & Leadership

POLICY ■ LEADERSHIP ■ MANAGEMENT ■ GOVERNANCE FOR SOUTH AFRICAN SCHOOLS

### Umalusi's adjustments, launch of NEEDU, and more!

Disappointingly we have still not managed to persuade the DBE to provide us with the subject code distributions for the 2010 NSC examinations. Fortunately, however, after a great deal of public and media pressure, Umalusi released a fairly detailed report on its moderation process for the 2010 NSC results, which included details on which subjects were adjusted and how these adjustments were made. We have analysed the data provided by Umalusi and have been able to bring you a more nuanced view of the effects that these adjustments will have had on different categories of candidates in those subjects where adjustments were made. We hope that you will find the information useful and that it will help you to better understand why some of your candidates performed as they did.

We have also been involved with several organisations over the past few years that are working to support underperforming schools from across the country. In the article 'What I have learned from working with underperforming schools', managing editor Alan Clarke lists some of the things that he has learned from this work and provides advice on management and leadership-related issues that he believes hinder the improvement efforts of many struggling schools. In this issue we also feature Imekhaya Primary School in Mossel Bay, one of the schools that he has been working with and over the next few editions will report on the implementation of the school's improvement strategies and track the performance of its learners in order to assess the effectiveness of these interventions.

The National Education, Evaluation and Development Unit (NEEDU) was finally launched at an Inception Conference on 17 and 18 March, in Pretoria. The launch of NEEDU will finally provide this country with what we hope will be an independent unit with the statutory power to investigate and provide detailed and authoritative reports on the functionality and quality of our basic education system at every level – classroom, school, district office, provincial offices and the national head office in Sol Plaatje House. It was a fascinating conference and we have included a report on the conference and some of its highlights in this issue. We trust that you will find this edition an interesting and worthwhile read. ■

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### SM&L

Is published five times a year by Ednews. It seeks to provide the leaders of South African schools with current and relevant information on issues of policy, leadership, management and governance.

# Umalusi's mandate: The principles and processes involved in the adjustment of the NSC marks

The Council for Quality Assurance in General and Further Education and Training, better known as Umalusi, is the statutory body charged with the task of quality assuring the NSC examinations. It explained why and how it does this in a presentation to the Parliamentary Portfolio Committee for Basic Education earlier this year.

On 15 March 2011, in a presentation to the Parliamentary Portfolio Committee for Basic Education on the 2010 National Senior Certificate Examinations, representatives of Umalusi provided a clear exposition of:

- its legal mandate
- the principles and processes that underpin the mark-adjustment process
- how and why marks were adjusted in the subjects where adjustments were made. It is worth noting that Umalusi quality assured and adjusted marks of IEB candidates using the same principals and processes that it used for the NSC examinations set by the DBE.

### Umalusi's legal mandate

In terms of the General and Further Education and Training Quality Assurance (GENFETQA) Act, Umalusi, which is the name that has been given to the GENFETQA Council, is required to:

- assure the quality of assessment at GET and FET exit points (for schools these are the end of Grades 9 and 12)
- develop policy for the accreditation of assessment bodies other than departments of education and must submit this to the Minister for approval
- accredit an assessment body in accordance with the regulations approved by the Minister
- perform the external moderation of assessment of all assessment bodies and education institutions
- adjust raw marks during the standardisation process where this is deemed to be appropriate
- approve the publication of the results of learners, with the concurrence of the Director-General and after consultation with the relevant assessment body, provided that it is satisfied that the assessment body or education institution has:
  - conducted the assessment free from any irregularity that may jeopardise the integrity of the assessment or its outcomes
  - complied with the requirements prescribed by the Council for conducting assessments
  - applied the standards prescribed by the Council that a learner is required to comply with in order to obtain a certificate
  - complied with every other condition determined by the Council.
- issue certificates to learners who have achieved qualifications or part qualifications.

It is quite clear from this that Umalusi has a legal obligation in terms of the act to adjust the marks of candidates as part of the process of quality assuring a qualification such as the National Senior Certificate. The mark-adjustment process is about ensuring that standards are consistent from year to year and across examining bodies. Umalusi defines standardisation as the 'process used to mitigate the effect of factors other than learner's knowledge and aptitude on the learner's performance'. It sets out the objective of standardisation as:

- 'to ensure that a cohort of learners is not advantaged or disadvantaged by extraneous factors other than their knowledge of the subject, abilities and their aptitude'
- 'to achieve comparability and consistency from one year to the next'.

Two factors that typically affect learner performance are the degree of difficulty of the examination paper(s) and the rigour and consistency of the markers. It is because of the significant affect that these two elements can have on marks that they are so carefully monitored. Yet despite this careful monitoring, Umalusi is still forced to make substantial adjustments to the raw marks in some subjects every year. Examples of the adjustments that were made to the marks of some subjects written as part of the 2010 NSC examinations are carried in the following article in this edition.

The mark-adjustment process is guided by a number of general principles including:

- In general no adjustment should exceed 10% of the historical average.
- Adjustments in excess of 10% will only be considered at the upper end of the spectrum to increase the number of distinctions in a subject.
- The effect of the adjustment on an individual candidate should not exceed 50% of the raw mark obtained by the candidate. This principle is clearly designed to minimise the effect of mark adjustments on very weak candidates.
- Where the distribution of the raw marks is above or below the historical averages, the marks may be adjusted upwards or downwards subject to the limitations (10%).

Umalusi makes it quite clear, however, that these principles are not set in stone and that it 'retains the right to amend these principles where and when deemed to be necessary based on sound educational principles'. ■

## 2010 NSC Results

# How Umalusi adjusted the 2010 NSC results

**After some initial reluctance and in the interests of transparency, Umalusi finally released subject-specific data on the adjustments that it made to the 2010 NSC examination results.**

The Umalusi<sup>1</sup> Council is a statutory body which, in terms of the General and Further Education and Training Quality Assurance Act, is charged with the responsibility of setting and monitoring standards for general and further education and training in South Africa. What may surprise some is that its mandate extends beyond the NCS examinations to include:

- Senior Certificate (SC): This was the examination written by Grade 12 learners from most schools up until the end of 2007. The Senior Certificate is to be phased out by the end of this year.
- National Senior Certificate (NSC): The NSC certificate was introduced in 2008, replacing the Senior Certificate.
- National Technical Certificate (N3): This, like the SC, is being phased out as it is based on the 'old' curriculum.
- National Senior Certificate (Vocational): This replaces the National Technical Certificate and like the NSC was also introduced in 2008.
- National Certificate Vocational (NCV): This was introduced in 2007.
- General Education and Training Certificate: Adults (GETC).

The process of 'quality assuring' a qualification requires Umalusi to do more than simply check on the quality of examination papers, memoranda and marking. The council is also required to:

- evaluate individual qualifications to ensure that they are of the expected standard. These 'standards' cannot simply be arbitrary. An important part of the council's work is to ensure that they are properly benchmarked in a process that includes evaluating them against comparable standards of equivalent qualifications in other countries.
- moderate assessment to ensure that it is fair, valid and reliable
- conduct research to ensure educational quality
- accredit educational and assessment providers. These include such bodies as the Independent Examination Board, which is the examining body for the NSC of some independent schools.

- verify the authenticity of certificates.

At a media briefing on 15 March, following sustained pressure from opposition parties and the media, the Umalusi Council finally provided data on the adjustments that it made to the marks of candidates in individual subjects in the 2010 NSC examinations. Despite the fact that the popular press had been baying for this data for some time, their response to its release was rather muted. This was almost certainly a result of its technical nature and the fact the data itself was of little interest and relevance to members of the general public. We believe, however, that if properly interpreted this data can provide high school principals and subject head and district officials with valuable information – information that can help them to better understand not only how the moderation process takes place but also the specific influence that this may have had on groups of candidates in some subjects.

The information that we have provided in the table on page 5 has been extracted from the data provided by the Umalusi Council in its press release. What we have done, however, is to organise it in a way that we hope will make it easier for our readers to interpret. We have also added explanations where we think this is necessary. Not all NSC subjects have been included and we have chosen rather to select subjects that were written by the greatest number of candidates in most high schools. In our attempts to make sense of such terms as 'scaled adjustment' and how these adjustments may have affected the results of individual candidates who fell into particular mark bands we were forced to dust off some of our old Mathematics books and to brush up on our understanding of functions and graphs. The charts we have reproduced on the following pages are the result of our efforts and are designed to illustrate how the scaled adjustments that Umalusi refers to have affected the raw scores of candidates in Accounting, Agricultural Sciences, English (Home Language), Geography, Life Sciences and Mathematics. It is important to make it clear that the data that we used to produce the charts is only an approximation of the actual value of the adjustment

based on our own calculations and the data provided by Umalusi. We do not have access to the marks of individual candidates or to the manner in which they were distributed across the mark range and our data and graphs can therefore only be an approximation of the actual marks.

### Some observations on the subject means

In layman's terms a subject mean is the 'average' for the subject and is calculated by dividing the sum of the marks of all of the candidates who wrote the examination by the number of candidates. It is important to note that these are the 'means' of the examination and do not include the continuous assessment (CASS) mark for the subject. The CASS mark, which is provided by individual schools and which in most provinces is moderated at school and district level, is added to the mark after the raw marks for the examination have been accepted, or adjusted if the decision is made to adjust them. These means are therefore a good indicator of how candidates have performed in the examination paper(s) that they wrote rather than in the subject as a whole.

Our first observation after having spent some time working with the data is how consistent the subject means have been from year to year in individual subjects, which is what is needed for an exit examination of this kind and one that will be used to determine admission to institutes of higher learning. However, a subject mean is a relatively crude measure of the performance of a sample of this size and one could make a far better assessment of this consistency if the symbol/code distributions of each subject were also provided. This is data that we are still trying to access from the DBE. Other issues worth noting are:

- The means of the languages as a group are higher than almost all non-language subjects, other than Life Orientation (mean 63.2%), which is neither examined nor subject to any form of formal external assessment. The language means range from 45.7% for English FAL to 74.2% for isiZulu FAL. The means for Home Languages range from 54.3% for English HL to 65.0% for Xitsonga HL.
- The means of indigenous 'African' languages at Home Language and First Additional Language level are all higher than those of both Afrikaans and English at Home Language and First Additional Language, respectively. It is also worth noting that for four of the African languages at HL level the marks were lowered by 6 marks.
- English FAL, which is the subject written by the largest number of candidates (449 080) other than Life Orientation (550 813), has the lowest mean of all official languages. For more on the issue of

official languages see the article on page 8.

- The subject means of the non-language subjects are almost without exception below 50% with most falling below 40%.
- Disappointingly, subjects such as Mathematics, Mathematical Literacy, Physical Sciences, Life Sciences, History, Business Studies, Accounting and Economics, which are most likely to be used by tertiary institutions and prospective employers to determine whether to consider candidates for admission or employment are those with the lowest means. Of these subjects only Mathematical Literacy has a mean which is over 40%, with the means of Physical Sciences (30.3%) and Mathematics (28.6%) sitting at the bottom of the list.
- The marks of nine of the subjects listed were not adjusted, while of the remainder six were adjusted upwards and three adjusted downwards. The biggest adjustments were upwards adjustment by up to 23 marks to Accounting and up to 22 marks for Mathematics. Subjects adjusted downwards were adjusted by 6 marks or less.

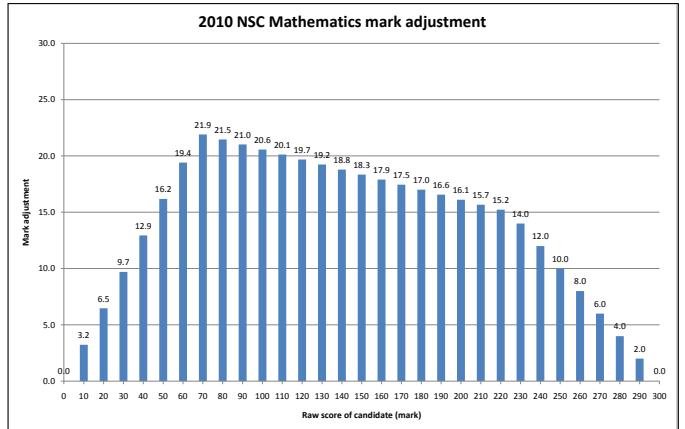
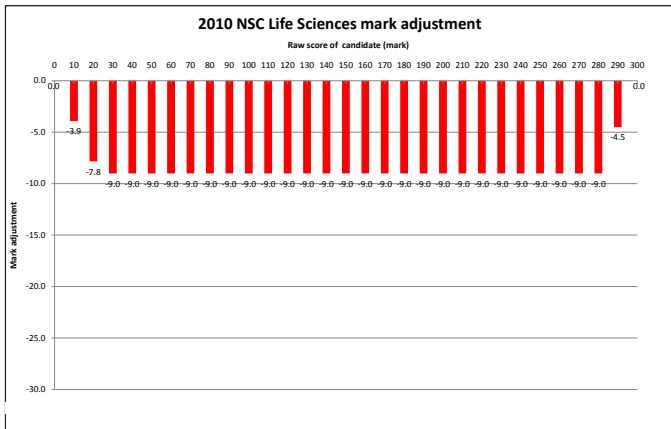
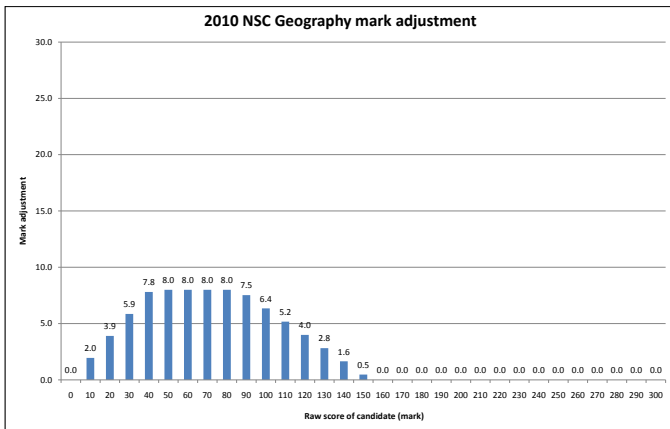
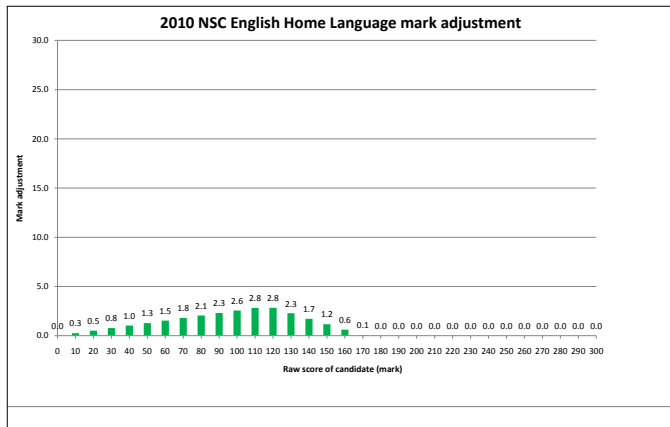
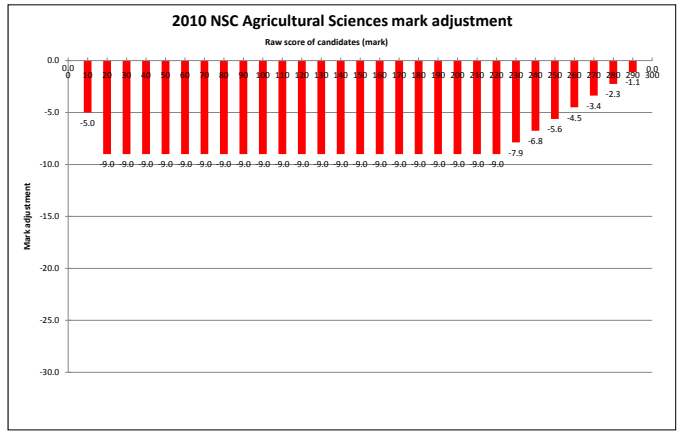
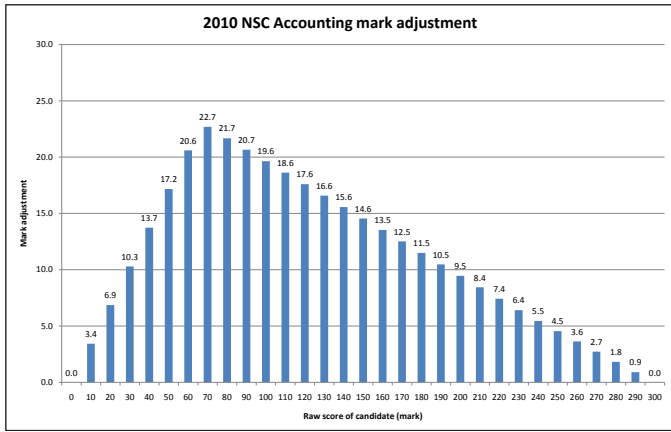
The release of this data by Umalusi is to be commended and we hope that in future it will become a matter of course for this data to be released at the same time as the results are released as this information can only help schools to gain a better understanding of the performance of their candidates and what they need to do to improve. We would also hope that either Umalusi or the DBE provide data on how the marks of each subject are distributed across the code bands. This code distribution data is particularly useful to the country's better performing schools, which use it to benchmark the performance of their subject teams and top candidates. ■

SM&L supports the important work that Umalusi does and accepts that the moderation and adjustment of marks is an essential element of the quality-assurance process. We have faith in the integrity of Umalusi Council and do not support the view expressed in some circles that the 2010 NSC results were artificially manipulated to serve some political agenda.

### References

- 1 Umalusi is an Nguni word that means herder or shepherd. In Nguni culture it is also used to describe a person who is the guardian of a family's wealth. It was chosen as the name for the council because the Umalusi council was established as the 'guardian' of this nation's general and further education and training standards.

Subject	Mean and whether marks were adjusted	Reason for adjustment (if adjusted)
Accounting	2010 mean: 33.00% (scaled upwards to a maximum of 23 marks) 2009 mean: 33.0% (information on adjustment not provided) 2008 mean: 32.0% (information on adjustment not provided)	The 2010 paper was considered to be more cognitively challenging than in previous years. This included a greater focus on application and problem solving questions in managerial accounting, managing resources, auditing and ethics.
Afrikaans (First Additional Language)	2010 mean: 51.16% (marks not adjusted) 2009 mean: 50.33% (marks not adjusted) 2008 mean: 47.48 (marks not adjusted)	Not adjusted
Afrikaans (Home Language)	2010 mean: 57.79% (marks not adjusted) 2009 mean: 56.42% (marks not adjusted) 2008 mean: 53.77% (marks not adjusted)	Not adjusted
Agricultural Sciences	2010 mean: 31.00% (scaled downward adjustment to a maximum of 9 marks) 2009 mean: 28.43% (not adjusted) 2008 mean: not provided	Paper appeared to be easier than in previous years although it met the requirements of Subject Assessment Guidelines.
Business Studies	2010 mean: 36.48% (marks not adjusted) 2009 mean: 36.97% (marks not adjusted) 2008 mean: 36.22% (marks not adjusted)	Not adjusted
Computer Application Technology (CAT)	2010 mean: 45.13% (marks not adjusted) 2009 mean: 43.90% (marks not adjusted) 2008 mean: 45.49% (marks adjusted)	Not adjusted
Consumer Studies	2010 mean: 43.50% (marks adjusted upwards by 4 marks) 2009 mean: 45.87% (marks not adjusted) 2008 mean: 41.28% (marks not adjusted)	The decline in the raw mean from 45.87% in 2009 to 43.50% in 2010 was attributed to the question paper, which contained more higher-order questions and included technical language that was beyond the ability of some second language speakers.
Economics	2010 mean: 36.76%,(marks not adjusted) 2009 mean: 33.07% (after marks adjusted) 2008 mean: 34.13% (after marks adjusted)	Not adjusted
English (Home Language)	2010 mean: 54.32% (scaled upward adjustment to a maximum of 3 marks) 2009 mean: 54.44% (not adjusted) 2008 mean: 53.7% (not adjusted)	There were higher failure rates. The higher failure rates suggested that candidates were choosing to take English HL, despite the fact that it was not their home language. Candidates hoped that that by choosing English HL, they would better their chances of access to higher education.
English (First Additional Language)	2010 mean: 45.68% (upward adjustment by 3 marks) 2009 mean: 46.33% (not adjusted) 2008 mean: 45.21% (not adjusted)	The low raw mean of 44.68% was attributed to the paper 2 (Literature), which was considered to be too long, with moderate to difficult questions and a limited choice of questions.
Geography	2010 mean: 34.80% (scaled adjustment to a maximum of 8 marks) 2009 mean: 35.07% (adjusted upwards from 31.96%) 2008 mean: 35.8% (adjusted upwards from 33.05%)	Adjusted to bring it in line with previous means.
History	2010 mean: 38.95% (not adjusted) 2009 mean: 37.40% (not adjusted) 2008 mean: 33.99% (not adjusted)	
IsiZulu (Home Language)	2010 mean: 63.51% (adjusted downwards by 6 marks) 2009 mean: 60.02% (not adjusted) 2008 mean: not provided)	The 2010 raw mean 65.51% was substantially higher than that of 2009. IsiZulu was one of four African Home Languages that were adjusted downwards by 6 marks because the papers were seen to be of lower cognitive demand than other Home Language papers.
IsiXhosa (Home Language)	2010 mean: 60.24% (not adjusted) 2009 mean: 62.16% (not adjusted) 2008 mean: not provided	Although the 2010 mean was lower than the 2009 mean it was not adjusted as the 2010 paper was considered to be easier than the 2009 paper.
Life Sciences	2010 mean: 38.00% (scaled adjustment downwards by a maximum of 9 marks) 2009 mean: 34.84% (not adjusted) 2008 mean: 35.15% (not adjusted)	The 2010 raw mean was 41.60%. This was considered too high. A qualitative evaluation of the paper suggested that it was of lower cognitive demand than the 2008 and 2009 papers with more questions that were either easy or of moderate difficulty than in 2008 and 2009. The question papers also did not contain sufficient 'application' questions.
Mathematics	2010 mean: 28.6% (scaled adjustment upwards to a maximum of 22 marks) 2009 mean: 27.3% (adjusted upwards from 20.79%) 2008 mean: 28.26% (adjusted upwards from 22.69%)	The 'consistently poor' Mathematics results are attributed to the fact that Mathematics has become compulsory either as Mathematics or Mathematical Literacy. Approximately half of all candidates now take Mathematics, which is far more than ever took the subject in the old SC examinations. Pairs analysis has also shown that the Mathematics question papers were significantly more difficult than other papers.
Mathematical Literacy	2010 mean: 43.73% (not adjusted) 2009 mean: 39.59% (not adjusted) 2008 mean: 41.87% (adjusted downwards from 45.20%)	The improved performance in 2010 was attributed to more candidates selecting Mathematical Literacy instead of Mathematics, i.e. candidates are making more realistic choices.
Mathematics (Paper 3)	2010 mean: 45.85% (not adjusted) 2009 mean: 41.06% (adjusted – the extent was not provided) 2008 mean: 40.77 (adjusted – the extent was not provided)	The higher mean for 2010 was accepted because there was a significant drop in the number of candidates who took Mathematics (Paper 3)
Physical Sciences	2010 mean: 30.26% (not adjusted) 2009 mean: 25.17% (adjusted – extent not provided) 2008 mean: 30.33% (adjusted – extent not provided)	The decision to accept the high 2010 mean was informed by the following: <ul style="list-style-type: none"> <li>The 2010 question papers were much clearer ('less wordy') than previous papers, which made them more accessible to second language learners.</li> <li>Improved subject guidelines for teachers provided by the DBE after Umalusi indicated that the curriculum was too broad.</li> </ul>



# Sinking deeper into mediocrity

Adjusting expectations downwards is very dangerous – By Jonathan Jansen



Jonathan Jansen

I have in front of me the 2010 ‘Statement of Results’ for the National Senior Certificate statement of a youngster who demands to study at university. They are: Afrikaans 43, English 39, mathematical literacy 38, life orientation 78, business studies 41, computer applications technology 31, life sciences 28. At the bottom of the certificate is this unbelievable statement: ‘The candidate qualifies for the national senior certificate and fulfils the minimum requirements for admission to higher education.’

Understandably, this young woman takes these words literally, and correctly demands a seat in any place of higher learning. With the young woman’s claim to study I have no problem. With the society that sets the bar for performance so low, I have serious problems.

Slowly, slowly we are digging our collective graves as we fall into a sinkhole of mediocrity from which we are unlikely to emerge. We make excellence sound like a white thing. Behind a massive wave of populism, and in the misguided name of *regstelling* (setting right the past), we open access to resources and universities to young people without the hard work necessary to achieve those gifts and to succeed once there. Of course, you’re a racist if you question this kind of mindlessness; how else do you, as a politician, defend yourself against the critics of mediocrity in an election year?

I miss Steve Biko. In the thinking of black consciousness, he would have railed against the low standards we set for black achievement, in the language of the 1970s. This young (incidentally black) person did not achieve anything above 50% in her Senior Certificate results for any exam subject, but we tell her she can proceed to higher studies. What are we saying? That black students are somehow less capable and therefore need these pathetic results to access higher education? No, I am sorry, but today I am angry about the messages we send our children.

I saw black parents and students squirm the other night when I addressed a racially diverse group of parents and students and made this point clear: ‘If a black student requires from you different treatment and lower academic demands because of an argument about disadvantage, tell them to take a hike.’ (Okay, I used stronger language.)

I saw white teachers squirm when I made the other important point: ‘If you have lower academic expectations of black children because of what they look like, or where they come from, that is the worst kind of racism.’ Our society, schools and universities have adjusted expectations downwards, especially in relation to black students, and that is dangerous in a country with so much promise for excellence.

As stories come rolling in from across the country for our Great South African Teachers book, I am struck by one thing. That many black professionals who are chartered accountants, medical scientists or corporate lawyers tell of attending ordinary public schools under apartheid, often in rural areas, and having teachers at the time who, despite the desperate poverty and inequality, held high expectations of their learners. There was no compromising on academic standards; there was homework every day; there was punishment for low performance; and there was constant motivation to rise above your circumstances.

Not today. Mathematical literacy is a cop-out, a way of compensating for poor maths teaching in the mainstream. Parents of Grade 9 children, listen carefully – do not let your school force your child into mathematical literacy because they will struggle to find access to academic degree studies at serious universities. Insist your child does mathematics in Grade 10 for that important choice determines what your child writes in Grade 12.

It is not, of course, mathematical literacy that I am concerned about; there are good teachers of the subject. It is about the message we send: that children can’t do maths. In other words, a message again communicated of low expectations. Do not buy into this culture of mediocrity in the way your child makes subject choices. Also, tell your child not to take life orientation seriously; as you can see in the above results, there is no positive relationship between high marks in academic subjects and this thing called life orientation.

Small wonder young people with better results than those above are without work. The marketplace, and serious universities, know this child will not succeed with these kinds of results, even if Umalusi does not ‘get it’. ■

## 2010 NSC Results

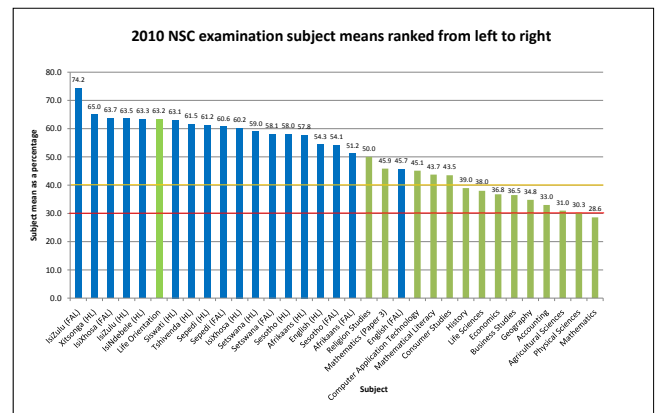
# Is the teaching of African languages in our schools really that good?

An analysis of the 2008–2010 NSC results suggests that if there is one thing that our schools excel at, it is in the teaching of our indigenous ‘African’ languages.

It was while we were busy with our analysis of the data provided by Umalusi on the subject means for the 2010 NSC results that we noticed that the means for African languages at both the Home Language and First Additional Language Level were significantly better than those of almost every other subject. Further investigation showed that when sorting the official languages by ‘mean’, whether at HL or FAL level, the resulting rank order put English and Afrikaans at the bottom of the list. This set us thinking about why this may be so.

The most obvious answer is that English and Afrikaans, as former official languages, remain the second language of choice for the majority of learners for whom one or other of these two languages is not a home language. This is certainly the case for English FAL, which is written by more candidates each year than any other subject. In 2010, 449 080 candidates wrote the subject. This is 5 524 more than the total number of candidates who wrote at home language level in each of the other nine official languages. The fact that more candidates wrote English (FAL) than the total who wrote the other official languages is probably a consequence of foreign language candidates who have been exempted from having to take a South African language at Home Language level.

With nearly all of the candidates other than those candidates who wrote English HL writing English FAL, one would have expected the mean of English HL to be similar to that of the other Home Languages and yet this is not so. The mean of English HL is just 54.3% with 92.8% of these candidates achieving 40% or more in the subject. Compare this to isiZulu HL, which had a mean of 63.5% with 99.1% of candidates scoring 40% or more, or to isiXhosa HL with a mean of 60.2% and 99.7% of candidates scoring 40% or more. In the 2010 NSC examinations isiZulu with 122 694 candidates was the Home Language with the highest number of candidates, followed by English HL with 94 929 and isiXhosa with 70 377. It is possible that



for some of the English HL candidates, English was not their home language, and that the lower English HL mean and 40% pass percentage is due to these candidates, but our calculations suggest otherwise as these candidates could make up no more than 7% of the total number of English HL candidates.

While it would be unfair to compare the performance of English HL candidates in subjects such as History and Mathematics with those candidates whose home language is not English because of the massive advantage they have from being both taught and examined in their mother tongue, one has to question whether African languages in this country are taught and assessed with sufficient rigour?

We pose this question about the academic rigour of the teaching and examining of African languages not because of concerns about the seemingly inflated performance of candidates in these languages but because research has shown that the cognitive development of children is intimately linked to the way they acquire and use their mother tongue. This leads to a second and more important question, the answer to which could well help explain the poor performance of South Africa’s children in internationally benchmarked studies of literacy and numeracy. The question is this: Is the poor performance of South African children in internationally benchmarked studies partially a consequence of insufficient language stimulus and development in these children’s pre-school years and in poor mother tongue instruction in their early years of schooling? We had no way of knowing the answer to this question until the introduction of the Annual National Assessment earlier this year. The performance of learners in their mother tongue at primary school level has never been assessed in any systemic way using valid externally benchmarked instruments. Let us hope that the results of the ANA testing is able to shed some light on this issue and that of the rigour and validity of the academic standards of NSC examinations in African languages. ■



# Systemic assessment of learner performance by the WCED

The Western Cape Education Department (WCED) has since 2002 been assessing learner performance in literacy and numeracy at Grade 3 and Grade 6 level. We have used its most recent report on the performance of the learners of one school to describe and explain the value of this form of systemic evaluation.

The Western Cape Education Department (WCED) provides schools with a comprehensive report on the results achieved by their learners in the Grade 3 and Grade 6 systemic assessment tests. The systemic assessment tests were used for the first time in the province in 2002 to evaluate the performance of learners in Grade 3. In the following year the performance of all Grade 6 learners was assessed and in the years that followed the tests were conducted on all Grade 3 and Grade 6 learners in alternate years. In 2010 all learners in Grades 3, 6 and 9 were assessed for the first time in the same year. While the decision has been made to treat the Grade 9 test as a pilot the data from the Grade 3 and Grade 6 tests have been analysed and released to schools in the form of comprehensive reports. We have provided a relatively comprehensive comment and analysis of the results of one school in this article in the hope that it will help principals and teachers of schools in the Western Cape to better understand what the data means and also to provide principals and educational leaders in other provinces with an insight into the value and potential benefits of a programme of this nature. The school whose results we discuss is Imekhaya Primary School in Mossel Bay, which we have featured elsewhere in this edition and which we are working with in an effort to help the principal and her staff to improve the performance of their learners. Learner performance in these tests will be one of the measures we use to evaluate our progress.

Each school is provided with a comprehensive report on the performance of their Grade 3 and Grade 6 learners in the two sets of tests that are designed to assess their level of performance in literacy and numeracy relative to the Learning Outcomes and Assessments Standards of these two grades. The reports include a number of tables that provide detailed data on learner performance.

*The systemic assessment tests were used for the first time in the province in 2002 to evaluate the performance of learners in Grade 3*

All of the data in the tables contained in this article has been extracted from these WCED reports.

In order to properly interpret the data it is important to understand what the different percentages represent and how they are determined.

1. The assessment standards are based on the National Curriculum Statement (NCS) with the attainment level to pass set at 50%. Only learners who score 50% or more at Grade 3-level will therefore be considered to have achieved a 'pass' in these tests. The Imekhaya results show that in 2010, 35.6% of the Grade 3 learners who wrote the numeracy test scored 50% or more in the test and 57.4% of the Grade 3 learners scored 50% or more in the literacy tests.
2. Most of the tables provide both the average mark for the group calculated as a percentage and the percentage of those who passed at a specific level (e.g. Grade 1-level). Both of these figures have relevance although the percentage that passed is probably the more important of the two.
3. The Grade 3 tests included test items that are designed to measure the performance of individuals at each of Grade 1, 2, 3 and 4 levels. This makes it easier to identify specific weaknesses of individual learners and also in the quality and success of the teaching and learning process at different levels within the school. If certain sections of work or skills are not properly taught and mastered in a particular grade this is likely to show up in the results of learners. There are examples of this in the Imekhaya results.
4. Some of the data provided may be incorrect. The figure of 1.2% in the table below that is meant to represent the 2006 pass percentage for numeracy is a possible example of this kind of error and should be treated with caution as it probably incorrect.

Assessment	2004	2006	2008	2010	Difference between 2008 and 2010	Results
Numeracy results	27.5	1.2	27.7	35.6	7.9	Improvement
Literacy results	20.0	59.0	60.0	57.4	-2.6	Minor decrease

### Imekhaya's Grade 3 results for 2010

The summary of the school's results from 2004 to 2010 as shown in the table above provides a good overview of the performance of the school.

#### A number of issues emerge from this data:

1. The 2006 numeracy result of 1.2% is almost certainly incorrect and is probably the result of a typographical error.
2. There has been a steady improvement in the results, which is a positive sign, although the literacy results seem to have become stagnant with no significant improvement since 2004.

This data is useful because it is an indication of progress but not very helpful as it does not show the areas of weakness and strength.

Better information is provided by a second table that shows the performance of learners in the test items that measured performance at the different grade levels. We have reproduced some of this data in the

table below.

This table shows quite clearly that although most of the learners who were assessed could master the Grade 1 work, only just over 50% could manage the Grade 2 work, and only about a third of the group could manage the Grade 3 work. Interestingly nearly 15% of the class were good enough to pass at Grade 4 level.

Rearranging the data in another way provides another view of the performance of this group of approximately 100 Grade 3 learners when the test was taken:

- 15 were good enough to have passed Grade 4 level Mathematics.
- 36 were good enough to have passed Grade 3 level numeracy.
- 57 were good enough to have passed Grade 2 level numeracy.
- 94 were good enough to have passed Grade 1 level numeracy.
- 6 had yet to develop the skills and knowledge they needed to pass Grade 1 level numeracy.

### Numeracy

Grade 1		Grade 2		Grade 3		Grade 4	
Average mark (%)	Pass percentage	Average mark (%)	Pass percentage	Average mark (%)	Pass percentage	Average mark (%)	Pass percentage
83.3	94.1	53.5	57.4	42.7	35.6	28.7	14.9

The figures for literacy were better, as the table below shows (data on Grade 4 level performance for Literacy was not provided).

While these figures are better they still show that there at least one child sitting in the Grade 3 class who has not mastered Grade 2 level literacy and that at least 43

### Literacy

Grade 1		Grade 2		Grade 3	
Average mark (%)	Pass percentage	Average mark (%)	Pass percentage	Average mark (%)	Pass percentage
98.4	100.0	79.6	99.0	49.5	57.4

Grade 3 learners had not mastered Grade 3 literacy. For schools with results like these the question to be answered is how to use this information in a constructive way. Our first recommendation would be to use it to identify the learners who were not performing at the required level and to provide them with intensive support. The six or so Imekhaya learners who are still incapable of mastering Grade 1-level numeracy may need a more thorough assessment to determine the extent of their learning difficulties and whether or not these are a result of some underlying medical condition.

In addition to the above the report provides more specific and detailed information about learner performance that can be used to further identify the strengths and weaknesses of the school's learners and to assess whether some of the shortcomings might be a consequence of the poor teaching.

We have deconstructed the numeracy test results to illustrate what the data can tell us about the performance

*The report provides more specific and detailed information about learner performance that can be used to further identify the strengths and weaknesses of the school's learners and to assess whether some of the shortcomings might be a consequence of the poor teaching.*

of learners in specific skill sets at each grade level.

The following table provides far more useful data about where the learners' problems might lie. Clearly the majority of learners in the Grade 3 class are unsure about Grade 3 level counting and their ability to do subtraction is also poor. They also lack the required level of competence in repeated addition and multiplication, in division and fractions, and in sums that require problem-solving skills. The extent of these problems suggests that they may have to do with how these competencies are taught and this may well require a need to check on competence of the Grade 1, 2 and 3 teachers in terms of their subject content knowledge and skills, and in their ability to teach these concepts in a way that is meaningful to learners.

The deconstructed literacy data is given in a slightly different form but still provides useful data about the specific strengths and weaknesses of the Grade 3 group. We have used only some of the data provided by the WCED in the following table for purposes of illustration.

Task/Knowledge and Skill	Grade 1		Grade 2		Grade 3		Grade 4	
	Average mark (%)	Pass percentage	Average mark (%)	Pass percentage	Average mark (%)	Pass percentage	Average mark (%)	Pass percentage
Addition	94.6	99.0	57.4	71.3	63.6	77.2	27.7	27.7
Counting	89.4	93.1	74.3	84.2	47.5	47.5	72.3	72.3
Subtraction	62.9	83.2	47.3	43.6	31.7	39.6	12.4	23.8
Repeated addition and multiplication	-	-	38.8	47.5	46.0	47.5	25.4	14.9
Division and fractions	-	-	32.7	56.4	21.0	19.8		
Ordering	-	-	95.0	95.0	81.2	81.2		
Counting, ordering and representing numbers	89.4	93.1	77.7	91.1	59.5	77.2	72.3	72.3
Solving problems	-	-	38.0	35.6	23.5	9.9	23.8	23.8
Calculations	78.7	96.0	61.8	65.3	47.3	40.6	21.0	10.9

Skill	Learning Outcome	Assessment item	Performance					
			Grade 1		Grade 2		Grade 3	
			Average mark (%)	Pass percentage	Average mark (%)	Pass percentage	Average mark (%)	Pass percentage
Reading single words	3	Choose one of four pictures to match a given word	98.4	100.0				
Reading single sentences with visual clues	3, 6	Short sentences with missing word, and a choice of four words to complete the sentence			89.0	97.0		
Reading single sentences without visual clues	3, 6	Short sentences with a choice of four words to correctly complete the sentence			70.3	87.1		
Comprehension based on a 'mind map' text	3, 5	Mind map, with pictures for visual clues					63.4	74.3
Comprehension based on an extended passage	3, 5	Paragraph in narrative style, with photographic clues. Three short paragraphs and 12 sentences in all					43.2	37.6

The data in the previous table provides fairly compelling evidence of the weaknesses of the Grade 3 learners at Imekhaya. Clearly the learners need more practice in working with extended passages of text. This is the kind of useful and practical information that the principal and her staff can glean from these reports provided they are prepared to invest some time and effort in going through them. They can then use this information to amend their teaching strategies in Grades 1 to 3 to ensure that time is devoted to those aspects of literacy and numeracy instruction in

which learners have been found to be weak. They will also be in a position to design appropriate remedial interventions to help their Grade 3 learners improve in these areas thereby ensuring that they are better equipped to progress in Grades 4 to 6.

The WCED systemic assessment report on the performance of Grade 6 learners has a similar format to that of the Grade 3 report and also provides useful diagnostic detail of learner performance.

### Grade 6 Numeracy

Grade 3		Grade 4		Grade 5		Grade 6		Grade 7	
Average mark (%)	Pass percentage	Average mark (%)	Pass percentage	Average mark (%)	Pass percentage	Average mark (%)	Pass percentage	Average mark (%)	Pass percentage
28.2	21.3	45.1	36.2	36.2	4.3	27.1	5.3	9.6	0.0

More useful data is provided in a table that indicates how learners have performed in each of the four Learning Outcomes (LOs) at each grade level.

Competency	Grade 3		Grade 4		Grade 5		Grade 6		Grade 7	
	Average mark (%)	Pass percentage	Average mark (%)	Pass percentage	Average mark (%)	Pass percentage	Average mark (%)	Pass percentage	Average mark (%)	Pass percentage
Numbers (LO1)	27.7	45.7	35.8	43.6	18.0	5.3	29.4	8.5	0.0	0.0
Patterns (LO2)	0.0	0.0	57.4	80.9	30.9	30.9	31.2	30.9	0.0	0.0
Space, shape (LO3)	31.9	39.4	53.0	57.4	34.6	55.3	24.8	7.4	0.0	0.0
Measurement (LO4)	21.3	38.3	41.5	28.7	13.0	3.2	13.8	25.5	0.5	1.1

The above table shows quite clearly that the learners experience most problems with Learning Outcome 1 (Numbers) and Learning Outcome 3 (Space and shape). Even more detailed information on just where their

strengths and weaknesses lie is provided in another table of data that separates out the specific knowledge and skill descriptors that define each Learning Outcome. Some of this data is reproduced on the next page.

Learning Outcome	Knowledge and skills	2010 performance	
		Ave Mark (%)	Pass Percentage
Numbers (LO1)			
	Order and compare	25.8	28.7
	Representing numbers	33.3	31.9
	Place value	37.8	57.4
	Rounding off	23.9	34.0
	Add and subtract	28.0	28.7
	Multiply and divide	20.6	1.1
	Solve problems in context	16.3	4.3
Patterns (LO2)	Number and pattern	25.9	19.1
	Geometric patterns	38.3	66.0
	Equations and expressions	31.1	40.4
Space and shape (LO3)	2-dimensional shape	36.5	26.6
	3-dimensional shape	47.6	67.0
	Transformation of shapes	31.4	37.2
	Perspective	8.5	17.0
	Position	43.1	55.3
Measurement (LO4)	Capacity	27.8	16.0
	Length	31.9	31.9
	Time	18.1	34.0
	Mass	12.2	22.3

The value of this more detailed data for an underperforming school is that it makes it possible for teacher to identify quite specific weaknesses. In the case of the Imekhaya learners the evidence shows that they struggle with multiplication and division, with solving problems in context, with numbers and patterns, with perspective and with the measurement of capacity. This gives their teachers something to work with and makes it possible for them to focus

their efforts on improving learner performance in these areas. This does not mean that other areas should be neglected because the pass percentage in all but two knowledge and skill sets is below 50%.

The data on the learners' performance in literacy is equally helpful as can be seen from the following table that reproduces some of the data provided in the report.

Knowledge and skill	Ave Mark (%)	Pass percentage
Unscramble letters	18.3	5.4
Words from pictures	51.0	54.8
Comprehension (approximately 150 words)	25.3	9.7
Read and interpret a map	37.2	16.1
Comprehension (approximately 1 000 words)	9.4	10.8
Read and interpret a report (approximately 160 words)	13.9	3.2
Write a 10-sentence paragraph based on the report above	34.3	10.8

These results illustrate just how poor the literacy levels of this group of Grade 6 learners are. Their lack of ability to read with understanding and to write meaningful sentences must impact on their performance in every other subject, including Mathematics. Improving the learners' language skills needs to be seen as the priority for every teacher in every class. The Imekhaya learners were all taking the test in English, which is their second language and is also the second language of their teachers so it is unsurprising that they perform poorly. Their plight, however, is the plight of the majority of learners in this country. Getting second language teaching right in the early years of schooling is therefore an absolute necessity if we as a country are to improve our educational outcomes. Mrs Gwe and her team at Imekhaya had already introduced a number of interventions to improve both their literacy and numeracy results based on the performance of their learners in previous systemic tests. They will be able to use this latest round of systemic testing to tweak some of their interventions and to introduce others with the aim of ensuring that their 2011 results are better.

The WCED needs to be commended for their brave and enlightened decision to introduce diagnostic systemic testing of this kind. It has already borne fruit, as the province's improved results in literacy

*The WCED needs to be commended for their brave and enlightened decision to introduce diagnostic systemic testing of this kind. It has already borne fruit, as the province's improved results in literacy and numeracy saw them being included in a recent McKinsey Report on improving education systems.*

and numeracy saw them being included in a recent McKinsey Report on improving education systems. Nationally, the DBE has introduced a similar kind of testing in the form of the Annual National Assessments (ANAs), which was introduced this year for the first time in Grades 3, 6 and 9 in an effort to evaluate the performance of the schooling system as a whole. The ANAs differ, however, from the WCED systemic evaluation in two critical areas – the ANA tests are marked internally by the learners' teachers who then submit the marks to the DBE; and the ANAs are not designed to be diagnostic so it will not be possible to provide the kind of detailed feedback to schools on levels of performance by learners that the WCED systemic testing provides. Still, they are a start and we look forward to the release of the first comprehensive data-set of learner performance at a level other than that of the National Senior Certificate.

The question to be answered is how to use this information in a constructive way.

The WCED needs to be commended for their brave and enlightened decision to introduce diagnostic systemic testing of this kind. It has already borne fruit, as the province's improved results in literacy and numeracy saw them being included in a recent McKinsey Report on improving education systems. ■

# The Umlambo Foundation

**People winning against poverty through education: One school at a time, for every child, in every family.**

The Umlambo Foundation's vision statement, which forms the subheading of this article, perfectly describes the way it has approached achieving its mission. The Foundation, which is the brainchild of former deputy president Phumzile Mlambo-Ngcuka who trained and worked as a teacher before entering politics, defines its mission as 'leveraging the goodwill of people and institutions to invest in leadership and management development of school principals to improve the quality of education in public schools; giving learners a chance to win against poverty'. Although the Foundation's main focus is on leadership and management programmes for principals, it also offers supplementary programmes, which include Mentoring and Coaching, Train-the-Trainer in ICT, Educator Support in English and Life Orientation, and Whole School Development.

Despite the fact that it was launched only in October 2008, the work of the Foundation is already having a positive impact on a number of the schools that it is supporting through its programmes. Central to its work is its programme aimed at developing the leadership and management skills of the principals of participating schools. As an initial step in developing their basic knowledge and skills, the principals of participating schools are expected to enrol as candidates for an Advanced Certificate in Education: School Leadership course (ACE: SL). The initial plan was for all the principals on the programme to enrol for the ACE: SL course offered by the University of Johannesburg, irrespective of the province in which their school was located, and this was the arrangement for the first group of principals selected for the programme. Those principals who have joined the programme more recently, however, have mostly enrolled for the ACE course at the university closest to them at which the course is offered. The Umlambo principals enrolled in the ACE course are provided with significant additional support, which includes funding for the course where this is not provided by their provincial education department and the provision of a laptop, funded internet access and training in its use.

Another and perhaps more important element of support for participating principals has involved linking them with an experienced mentor/coach to provide them with the guidance and support that they may need as they work to implement improvement strategies in their schools. The mentors who have been recruited onto the programme

for this purpose are mostly experienced principals who have retired from their schools but who have continued to remain active in education. The designated title for these mentor-principals within the foundation is 'Reputable Retired Principals' or 'RRPs' for short! Although the Umlambo Foundation provides the funding for this mentoring, the recruitment of the RRP's and the management of the mentoring and coaching process has been outsourced to the Foundation for Professional Development (FPD). FPD is a South African private institution of Higher Education that was established by the South African Medical Association. Its initial focus was on providing training for the health sector. More recently however a decision has been made to expand its offering to include professional development and training courses for teachers and others involved in basic education. More information about FPD and the education-related services it provides are given on page 17.

*What we have with this project is a carefully constructed yet flexible experiment in the leadership and management development of practising principals.*

The original plans for the mentoring of participating principals envisaged a process that would involve three to five consultative visits. The reason for this was largely logistical, as although the initial aim was to recruit mentors and

place them with schools that were close to where they lived this was not always possible as a number of the participating schools are situated in small towns or rural areas. The reality has been that some mentors have to travel substantial distances to get to the schools that they are working with. The expectation was also that the RRP's would mostly be involved in helping their mentee principals to roll out the School Improvement Plan (SIP) that they were expected to develop as part of their ACE: SL course work. The development of a SIP involved:

- a needs analysis and the development of a vision and mission statement for the school based on this. Initially, for the first group of participating schools, this process was facilitated by business-sector organisations that specialise in work of this kind and who offered their services to the Umlambo Foundation. Their approach was typically private sector with the facilitators encouraging the members of the school community who were involved in the process to dream big and to think out of the box with little thought for many constraining factors that bedevil the functionality and long-term development of many township and rural public schools. Unfortunately in a number of instances this created false expectations about funding, the

availability of resources, and what was possible. Most of the mentors were not part of this process and were therefore not able to use their influence to ensure that the goals set by the schools that they were working with were realistic in terms of the school's level of functionality and the resources that it had at its disposal.

- a facilitated strategic planning day. The purpose of this was to develop a detailed strategic plan to achieve the goals identified as part of the needs analysis and articulated in the vision and mission statements that were developed as part of this process. This process was to be facilitated by the mentor.
- several follow-up sessions with the principal to monitor and review progress in the implementation of the plan and to provide support for the principal to ensure that the plan was rolled out as originally envisaged, leaving the school on track to achieve its goals.

It soon became obvious, however, that this programme model for school improvement required levels of leadership and management experience and competency that most of the participating schools and principals and their leadership teams had yet to acquire and that there was a need for a more basic intervention model. Fortunately this reality was quickly acknowledged by both the leadership of the Umlambo Foundation and the Foundation for Professional Development and a more flexible model was adopted. The new model committed to providing the mentee principal with extended ongoing support from their mentor to help them grow their leadership and management skills. Mentors were also encouraged to help the principals and their management teams to develop more appropriate and manageable goals with a focus on improving school functionality and learner outcomes.

There are currently 31 principals involved in this programme and the Umlambo Foundation plans to expand this until it has at least 100 schools involved. One of the many commendable features of this initiative is the Foundation's commitment to sharing what it is learning from the programme with the DBE. What we have with this project is a carefully constructed yet flexible experiment in the leadership and management development of practising principals. Its focus, however, is not just on improving the knowledge and skills of principals and their leadership teams, it is also on harnessing these developing skills to improve the quality of teaching and learning in their schools and ultimately to improve learner outcomes.

SM&L is intimately involved in the project as managing editor Alan Clarke is an RRP for four participating schools from the Western Cape, three in greater Cape Town and one in Mossel Bay. Two of these are high schools and two are primary schools. We plan, over the year ahead, to bring you some of the lessons about leadership and management development and school improvement strategies that he and the other RRP's from

the Umlambo Foundation have learned from their work with these schools. Given the range of schools involved and the relative diversity of the mentor group we are sure that there will be something of interest and of value for everyone involved in schools from the lessons that emerge from the Umlambo schools project. For more on one of the schools involved in the project turn to page 18.

### Schools supported by the Umlambo Foundation

The following schools, listed in alphabetical order, are currently being supported by the Umlambo Foundation:

Amatata Primary School, Inanda  
 Bapoganang Secondary School, Vryburg  
 Casino Primary School, Nquthu  
 Ekucabangeni High School, Nquthu  
 Emaxulwini Primary School, Hammersdale  
 Hoffenthal Primary School, Emakhasaneni, Bergville  
 Hofmeyer High School, Atteridgeville  
 Imekhaya Primary School, Mossel Bay  
 Jikindaba Senior Secondary School, Ramzi Administrative Area, Lusikisiki  
 Kama High School, Middledrift  
 Kromhoek Combined School, Umzimkhulu  
 Kwa-Phalo Primary School, Meadowlands  
 Lawley Primary, Lenasia  
 Litha Primary, Gugulethu  
 Little Flower Secondary School, Ixopo  
 Luhlaza High School, Khayelitsha  
 MC Kharbai School, Lenasia  
 Makgato High School, Letjatjana, Ga-Makgato  
 Manyano Secondary School, Khayelitsha  
 Mapuso Primary School, Polokwane  
 Masiphathisane Secondary School, Port Elizabeth  
 Mhlwazini Secondary School, Bergville  
 Moroka Secondary School, Bloemfontein  
 Orlando West High School, Orlando  
 Potshini High School, Bergville  
 Pudumong High School, Pudumoe  
 Rasila Secondary School, Moumoni Village Muila near Polokwane  
 Thuthukani Primary School, Phola, Ogies  
 Tyhume Primary School, Alice  
 Ubuhle Bemfundo High School, Kwa-Thema  
 Woodford Primary School, Bergville  
 Xolilizwe Sangoni High School, Eqawukeni, Umtata  
 Zwelihle High School, Ngcobo

An important element of support for participating principals has involved linking them with an experienced mentor/coach to provide them with the guidance and support that they may need as they work to implement improvement strategies in their schools.

What we have with this project is a carefully constructed yet flexible experiment in the leadership and management development of practising principals. ■



# The Foundation for Professional Development (FPD)

The Foundation for Professional Development was established in October 1997 by the South African Medical Association. It is a South African Private Institution of Higher Education and works predominantly in Africa. Its stated mission is to 'ensure the availability of skilled professionals, allied workers and managers who will be able to deliver a service to the public that is affordable, evidence-based and congruent with international best practice'.

What is interesting about its mission and vision statements is the emphasis that it places on service, and on how it sees education and training as a requisite for improved service and a better society. While most of FPD's current offerings focus on the health sector, which is unsurprising given that it was initially founded for this purpose, its

future plans include the provision of a range of purpose-designed training and professional development courses for those who work in basic education, including principals, teachers and district officials.

FPD is not only concerned with training, it is also involved in research and in the support and development of NGOs and grass-root organisations. Its work with the not-for-profit and community-based organisations is aimed at helping to develop their institutional capacity using the public-private initiative model.

Besides its work with the Umlambo Foundation, which is described in the preceding article, the FPD also offers the following services/training for individuals and organisations who work in and with schools:

### School wellness training programmes for principals and educators

These are short courses that support schools in managing the wellness of their learners and staff.

- Managing HIV in Schools – developing a holistic HIV programme to manage the effects of HIV across the school
- Managing Violence in Schools – understand the causes of violence, the strategies for recognising and preventing violence in the school. The course also equips participants with the resources they need to support learners and victims of violence.
- Counselling Skills – developing an understanding of psycho-social issues within the school; developing listening and communication skills to effectively counsel learners.

### Management training for principals, educators and SMT staff

- Strategic management – developing a vision, strategic and operational plan for your school
- Operations management – implementing the management process of planning, organising, directing and controlling, using practical tools and systems
- Financial management – managing budgets and resources, financial planning
- People management – motivating staff, developing effective teams, negotiation and conflict resolution, employee relations
- School governance – understanding good governance principles, practical tools and tips to create an effective SGB
- Leadership – the habits of effective leaders and how to cultivate strong leadership within yourself and in your organisation.

For more information, go to the FPD website [www.foundation.co.za](http://www.foundation.co.za) or call 012 816 9000.

FPD is a private institute for higher education, registered with the Department of Higher Education. ■

# Imekhaya Primary School

**I**mekhaya Primary School in the township of Kwanonqaba on the outskirts of Mossel Bay is one of 31 schools from across the country that is being supported by the Umlambo Foundation<sup>1</sup>, which was founded by former deputy president Phumzile Mlambo-Ngcuka. Kwanonqaba is a well-established township and although the houses are small they are mostly well-constructed brick structures with full services. Kwanonqaba is situated on the plateau above the central business district of Mossel Bay with beautiful views of the bay to the west and of the Outeniqua mountains to the north. The skyline to the west is dominated by PetroSA's massive gas treatment complex, which is one of the major employers in the area. The school is situated near the centre of the township at the end of a narrow lane. The main school building is a solid two-storey face-brick structure and, thanks to support from PetroSA over the years, the school is relatively well-resourced with a computer laboratory and a large multipurpose sports hall, which would be the envy of many independent and fee-paying schools.

The school has an enrolment of approximately 800 learners, most of whom live in Kwanonqaba. There are five Grade R class groups with approximately 30 learners per class in the pre-primary phase, three classes with approximately 40 learners per class in each grade of the Foundation phase and two classes with approximately 30 learners per class in each grade of the Intermediate and Senior phases.

One of the challenges that the school faces is that of an ever-changing learner population as many of the families are recent arrivals from the Eastern Cape who come to Mossel Bay in the hope of finding work. Some stay, while others either return to the Eastern Cape or move on to the bigger centres like George and Cape

Town. The consequence of all of this for the school is the presence of a significant number of learners who are either new to the area or who may come and go as their parents or primary caregivers move around in search of better employment opportunities. Added to this is the phenomenon experienced by many township schools of returning learners arriving well after the start of the academic year after having spent their Christmas/New Year break at their traditional family homes in the rural Eastern Cape.

Imekhaya principal Winifred Gwe leads a team of 20 teachers, two administrative clerks, a caretaker and two cleaners. The school has one deputy principal and three heads of department. Mrs Gwe and her school became Umlambo Foundation members in 2010 and she enrolled for the Advanced Certificate in Education: School Leadership (ACE: SL) at the University of Stellenbosch at the start of 2010. Interestingly, her deputy Christopher Belu is also studying further and is enrolled in an ACE course to upgrade his qualifications in the teaching of Mathematics.

In October 2010, Managing Editor Alan Clarke was invited by the Umlambo Foundation to be Mrs Gwe's mentor, which is how we are able to bring you this account of one school's efforts to improve the quality of education that it provides, and more particularly the systems and strategies that it has planned to implement in an effort to improve its learners' performance in literacy and numeracy.

One's first impression of the school is that it is well run. The main entrance and reception area are neat and clean, with posters on the walls and seating for visitors. There is also the busy buzz of a working school when one enters the reception area with phones being answered and



*PetroSA's gas-to-liquid refinery near Mossel Bay. PetroSA is one of the major employers in the region and has been sponsoring projects at Imekhaya for a number of years.*



*This classroom is typical of most at Imekhaya with sufficient space, desks and seating for learners and a good array of appropriate teaching aids.*

**Table 1**

<b>Grade 3</b>	<b>2004</b>	<b>2006</b>	<b>2008</b>	<b>2010 Target</b>
Literacy (pass percentage)	20%	59%	60%	60%
Numeracy (pass percentage)	27.5%	1.2%	27.7%	30%
<b>Grade 6</b>	<b>2005</b>	<b>2007</b>	<b>2009</b>	<b>2010 Target</b>
Literacy (pass percentage)	5%	25.5%	26.9%	30%
Numeracy (pass percentage)	0%	1.1%	0%	5%

visitors being greeted in a friendly and efficient manner. If you were to walk around the school you would find its corridors and classrooms mostly clean and tidy although there are some corners that appear to be dumping grounds for old and damaged furniture and textbooks, which is unfortunately a common feature of many schools. Most classrooms are neat with walls adorned with education-related posters and teaching aids typical of those that one would find in most good primary schools. There are desks and seats for every child and all learners are wearing at least a semblance of the school uniform. It is therefore surprising to find that in 2009 this seemingly well-functioning school was not able to produce a single Grade 6 learner capable of scoring 50% for numeracy in tests conducted by the Western Cape Education Department as part of its Grade 6 system evaluation of the literacy and numeracy levels. The Grade 6 results in literacy, although an improvement on those of previous years, were not much better, with just 26.9% of the Grade 6 learners performing at the level required for Grade 6.

The Western Cape has led the way in this kind of systemic testing and since 2002 has been testing the level of performance of all Grade 3 and 6 learners in literacy and numeracy, using externally set and benchmarked tests.

The results in table 1 were provided to the school in March 2010 by the school's Circuit Team Manager. The school falls under the Eden and Central Karoo Education District.

To an outsider who may not be familiar with the state of public education in this country these results would come as a shock but unfortunately they are fairly typical of the majority of schools and may even be better than most as no reliable and consistent systemic testing of this kind has been conducted in other provinces.

Table 2 gives the results for the Western Cape. This clearly illustrates the extent of the problem and the challenges that we face in trying to address this poor performance in skills that are essential if children are to progress at school.

The poor performance of the Imekhaya learners in literacy and numeracy were a clear indication that major challenges lurked under the surface of what appeared to be a well-functioning school and that the first step to finding remedies would involve processes that could help identify those factors that were preventing teachers and learners from performing at a level that would ensure future success.

Fortunately Mrs Gwe and her deputy Christopher Belu were both keen to put things right and to engage openly and honestly in discussion about the state of the school and the quality of teaching and learning at classroom level. Both threw themselves into the process with enthusiasm and it was helpful to discover that they worked well as a team with Mrs Gwe insisting from the start that Mr Belu be part of all of our discussions.

We met for the first time in October 2010 and after some initial discussion decided that we would not introduce any changes until the start of the 2011 academic year. Having made this decision, we set about discussing the school's current operational model and the kinds of systems and processes we would need to implement in 2011 that would contribute to our goal of improved learner performance in literacy and numeracy.

Our initial discussion on the school's routine operations yielded a number of issues that we felt needed to be addressed. These included:

1. a two-session day with just one 20-minute break
2. teachers at grade and phase level working on their own rather than cooperatively
3. lack of oversight and monitoring of the teaching and learning
4. the absence of clear job descriptions and lines of authority for heads of department and senior teachers
5. learner performance data that was only monitored and analysed at the end of the academic year
6. the lack of a detailed academic programme and year plan setting out the dates and deadlines for the year
7. the lack of school policies focussed specifically

**Table 2**

<b>Grade 3</b>	<b>2002</b>	<b>2004</b>	<b>2006</b>	<b>2008</b>	<b>2010</b>
Literacy (pass percentage)	35.7	39.5	47.7	53.5	54.9
Numeracy (pass percentage)	37.1	37.3	31.0	35.0	48.3
<b>Grade 6</b>	<b>2003</b>	<b>2005</b>	<b>2007</b>	<b>2009</b>	<b>2010</b>
Literacy (pass percentage)	35.0	42.1	44.8	48.6	52.3
Mathematics (pass percentage)	15.6	17.2	14.0	17.4	24.4

on improving the literacy and numeracy levels of learners

- the inclusion of both English and Afrikaans as first additional languages in the intermediate phase. The reason behind this was that some learners may end up at Afrikaans-medium high schools because of the prevalence of Afrikaans as Home Language in the Mossel Bay area.

In order to address these issues we decided to introduce the following systems and procedures from the start of 2011:

### **1. Rearranging the school day**

The plan involved the introduction of a three-session day with two 30-minute breaks. Session 1 would start at 8:00 and end at 10:30, session 2 would start at 11:00 and end at 13:00 and session 3 would start at 13:30 and end at 14:30. In the intermediate phase there would be 11 30-minute periods in the day. This would result in a longer school day, which would need to be approved by the SGB.

### **2. Daily sessions in each class devoted specifically to mental maths and reading**

To bolster literacy and numeracy and to emphasise its importance, teachers would be required to devote the first 30 minutes of each day to age-appropriate mental maths such as counting, basic addition and subtraction and multiplication tables. The first 30 minutes after first break were to be devoted to home language reading, which in the case of Imekhaya is isiXhosa, and the first 30 minutes after second break to reading in English. Teachers were to be encouraged to use a range of grade-appropriate reading strategies. On some days the reading periods for the languages would be swapped with English reading taking place after first break and isiXhosa after second break. The reason for using these specific times for mental maths and reading is because learners are more likely to be relaxed and alert, and to concentrate better, at the start of the day and after a break.

### **3. Designating HoDs as Phase Heads for specific grades with clearly defined duties and responsibilities**

One HoD would be appointed as the Phase Head of each phase (Foundation, Intermediate and Senior) and

would be designated with the task of co-ordinating the curriculum and assessment planning for the phase. The Phase Heads would be required to meet all of the teachers of the phase for at least 30 minutes each week to monitor their work and to plan the work and assessment for the following week. Minutes were to be kept of these meetings and the minute books submitted to the principal by the start of second break on a Friday for her checking and signature.

### **4. Designating Grade Heads for each grade**

One of the three class teachers from each grade was to be appointed as the Grade Head for that grade group and this person would be responsible for co-ordinating the work within the grade under the leadership of the Phase Head for the phase.

### **5. A detailed programme of work and assessment for the year prepared by each phase and grade team under the leadership of the Phase and Grade Heads**

Before the start of the new academic year the Phase and Grade Heads would need to meet to draw up a detailed programme of work for the year including all assessment tasks and the work that would be assessed. They were given a prepared template to assist them.

### **6. A detailed year plan setting out all dates and deadlines prepared by the principal**

The principal and deputy would prepare a detailed year plan for the year, which included dates and deadlines for all assessment tasks and for the collation of marks for the quarterly reports to parents. The checklists and templates provided in Volume 4 Number 4 of School Management and Leadership were used to assist them with this process. They were to see that the completed year plan was issued to teachers not later than the first day of the 2011 school year.

### **7. Checking of the learners' workbooks on a regular basis by the principal and deputy**

The principal and deputy principal were to check the workbooks of at least five learners each Friday as a way of monitoring the quality of teaching and learning in the school. They would then provide feedback to Phase Heads, Grade Heads and the teachers involved on what they learned from these book checks.



The computers for this computer room were funded by PetroSA. The room has never been used by class groups because the school cannot afford to employ a dedicated ICT specialist to set up and manage a network. This is a common problem in many of the country's low-fee and no-fee schools.



All learners are provided with a meal at first break each day as part of the school's feeding scheme and in line with national policy that provided funding for meals for learners of all no-fee schools. Catering is provided by parents or community members who receive a small stipend for their work.



The school has a dedicated library but the stock of books is limited.



The main entrance is clean and neat, creating a positive impression of a well-functioning school, which belies the poor performance of learners in literacy and numeracy.



Imekhaya's multipurpose hall that was built for the use of the school and the community with funds provided by the Garden Route Casino and the Garden Cities Archway Foundation



The school is situated on the plateau above the CBD of Mossel Bay and has a good view of the bay and the Outeniqua mountains.



*Principal Winifred Gwe and deputy Christopher Belu work well together and are determined to improve the performance of the school's learners.*

### **8. Setting aside time each week for meetings of Phase Heads with the teachers who teach that phase for purposes of planning and monitoring of teaching and learning**

Each Phase Head would be required to meet with the members of his/her phase team to monitor the progress of teachers and to ensure that individual teachers were keeping up with the planned programme of work for the year. The meetings would also be used to plan for the week ahead, to monitor assessment and learner progress and to discuss teaching strategies.

This was the proposed plan of action to be implemented from the start of 2011. Principal Winifred Gwe and her deputy Christopher Belu are clearly people of action because when I visited the school again just after the start of the 2011 school year virtually the full list of items had been introduced. To make sure that everything was ready for the start of the year the staff assembled nearly a week before they were required to, spending the time working on their work programmes and readying their classrooms for the arrival of learners. This is not to say that there had not been any hiccups. Not everyone was happy about the longer day and there were some challenges about the number of periods that needed to be allocated to each subject in the Intermediate and Senior phases but there were also some positive responses from teachers.

Mrs Gwe reported that they enjoyed working together on planning and assessment in their phase and grade groups and that they found having a detailed year plan helped ensure that there was no excuse for missing deadlines. The problem with the timetable was easily solved as it was caused by a failure to account for the daily periods that had been earmarked for mental maths and reading.

Mrs Gwe and Mr Belu found that the regular Friday checks of learner work was time-consuming but very worthwhile. These book checks helped them get a good idea of what was happening in the classrooms and which teachers were doing a thorough job. Teachers were themselves checking their learners' books more frequently, which was a good thing.

One other useful development in the first term was the writing of Annual National Assessment tests and the Western Cape Education Department Grade 6 systemic evaluation test in literacy and numeracy. While the results that the learners achieved in these tests remained disappointingly poor, the value of the results is that they could be used as the baseline to assess whether the strategies that have been put in place bear fruit in terms of improved learner performance. Our analysis and interpretation of Imekhaya's results in these two sets of assessment tests is given elsewhere in this edition. ■

#### **References**

- 1 For more about the Umlambo Foundation and its work turn to page 15.

# What I have learned from working with underperforming schools

Managing editor Alan Clarke has been working with the principals and management teams of underperforming schools for a number of years. In his experience most of the underperforming schools differ from their better performing peers in one or more of the following ways.

### 1. Leadership is not distributed

One of the characteristics of effective leaders is their ability to involve all members of their leadership team(s) in the decision-making processes. They try to build consensus and with it shared responsibility and accountability for all decisions. In schools where there are high levels of distributed leadership, leadership teams meet regularly and independently to plan and to monitor progress and performance against agreed-to, measurable goals. By contrast, in underperforming schools:

- The principal mostly works in isolation and seldom strays from his/her office.
- The SMT does not meet on a regular basis and when it does meet it is usually to deal with administrative and policy-related matters rather than issues of quality teaching and learning and learner performance.
- There is not a designated subject/phase head for every subject and/or phase and if individuals have been assigned to these positions they are seldom provided with a clear job description or held to account for their performance or lack of it.
- Subject and/or phase heads seldom meet with members of their subject and/or phase teams for purposes of planning or to manage and monitor learner performance within the subject or phase.
- Curriculum and assessment planning is seldom the product of a team effort.

### 2. There is a focus on compliance rather than on performance

The principals and leadership teams of underperforming school tend to focus their efforts on ensuring that they comply with departmental rules and regulations and the bureaucratic administrative demands of district officials rather than on addressing the individual and collective needs of their learners. Typically in underperforming schools:

- Principals spend most of their time on administrative matters such as the timely completion of forms rather than on managing and monitoring the quality of teaching and learning.
- Subject heads, phase heads and teachers devote more time to completing curriculum- and assessment-related documents than on planning curriculum and assessment, preparing lessons, setting homework and checking and marking learner work.

- Teachers use instructional time for marking and administrative matters.

### 3. Planning is superficial and haphazard

The principals and leadership teams at high-performance schools are thorough and timely in their planning. They are able to provide teachers, learners and parents with a detailed year plan for the academic year prior to the start of the year, which includes all important curriculum-related dates and deadlines. These dates and deadlines are seldom altered. In underperforming schools planning is mostly haphazard and inadequate. In underperforming schools:

- Principals and leadership teams typically spend very little time on detailed planning and seldom involve teachers in the planning process.
- Principals do not provide their teachers with a year plan that sets out all dates and deadlines for the year, prior to the start of the school year.
- Subject/phase heads do not provide members of their subject/phase teams with detailed work schemes for each grade for the year.
- Dates and deadlines are frequently changed.
- Dates and deadlines for items such as the submission of question papers and marks are seldom adhered to.

### 4. The monitoring of teacher and learner performance is limited and/or haphazard

In underperforming schools there is no systematic collection and analysis of data on learner and teacher performance and attendance.

- Teachers do not keep a detailed record of the attendance, marks and homework-completion of individual learners.
- Learner attendance and latecoming is not recorded and monitored on a regular basis and there is no follow-up of learners who are persistently absent or late.
- Teacher absence and latecoming is either not recorded or if recorded is not monitored. Teachers who are persistently absent or late are seldom challenged, reprimanded or charged for their absence and latecoming.
- Subject averages and code distributions of class, subject and grade groups are not recorded and

analysed on a quarterly basis to identify shortcomings and to provide support.

#### **5. There is no clear delegation of responsibility**

In underperforming schools roles and responsibilities are not clearly defined for promotion post holders and senior teachers:

- The school does not have an organogram showing its management structures and lines of authority.
- There are no clearly defined portfolios assigned to promotion post holders.
- Principals seldom engage promotion post holders in discussions about their duties and responsibilities or about their performance.

#### **6. There is no accountability**

In underperforming schools those who have been assigned tasks are seldom held accountable for the quality of their performance:

- Principals of underperforming schools are unwilling to acknowledge that the poor performance of their school may be a consequence of lack of leadership and good management on their part.
- Principals of underperforming schools do not hold subject and phase heads accountable for the performance of learners in the subject/phase that they head.
- Subject heads of underperforming schools do not hold individual teachers accountable for the performance of the class group that they teach.
- Poor learner performance in underperforming schools is seldom blamed on poor management and poor teaching.
- There are no consequences for those who miss due dates and deadlines in underperforming schools.

#### **7. Improvement plans are fuzzy**

In underperforming schools the School Improvement Plan is not based on a detailed analysis of performance data and learner needs:

- The improvement plans are not based on a baseline assessment and detailed needs analysis.
- The improvement plans do not set specific measurable targets.
- Improvement plans do not delegate responsibility for the achievement of specific targets to individuals.
- Improvement plans do not provide detailed descriptions of actions that need to be taken together with dates, deadlines and performance targets.

#### **8. Teachers do not collaborate**

At underperforming schools:

- Teachers seldom plan together in subject, phase and grade groups.
- Teachers seldom observe one another teaching or

discuss good practice.

- Teachers seldom share resources or work together to develop new resources.
- Few teachers belong to voluntary formal or informal specialist subject groups or subject associations.

#### **9. Principals and teachers lack professional knowledge and skills**

- At underperforming schools:
- Principals and teachers lack in-depth understanding of the factors that have the greatest impact on school success and learner performance.
- Principals are deficient in critical management and leadership experience and skills.
- Many teachers have poor subject content knowledge and limited pedagogical skill in the teaching of the subject.
- Principals and teachers are not clear about their priorities.
- Principals have no personal vision of what they want to achieve for themselves and for their schools.

#### **10. There is a lack of discipline**

We are not referring here to learner discipline, although that also matters, but to the kind of discipline that Jim Collins talks about in his book *Good to Great*<sup>1</sup>. According to Collins the truly great companies are characterised by 'a culture of discipline', which is defined as having disciplined people, disciplined thought and disciplined action.

- Disciplined people, according to Collins, are people who are willing to go to extreme lengths in order to fulfil their responsibilities.
- Disciplined thought is about everybody in the organisation having a thorough understanding of the organisation's goals and policies and what is expected from every individual.
- Disciplined action is about the individual contributions of every employee – the things that they do to ensure that the organisation achieves its goals. For principals and teachers of excellent schools a culture of discipline is not just about maintaining standards, it is about working constantly to establish new and better standards not only of teaching and learning and better results but of every aspect of school life including more care and greater respect. It is a culture of discipline of this nature that is the real prerequisite for school success. Unless the principal of a school can get this right, there is little chance of further success with the other nine elements that we have listed. ■

#### **References**

- <sup>1</sup> Jim Collins, 2001. *Good to Great: Why some companies make the grade and others don't*. London: Random House



# NEEDU Inception Conference, 17–18 March 2011

The National Education Evaluation and Development Unit (NEEDU) was launched on 18 March 2011. A number of speakers made presentations in one form or another to this two-day conference and there were also a number of eminent people who asked questions or spoke from the floor. To give you a better idea of the form and nature of the conference we have recorded bits and pieces of some of what was said, which we consider provide a good representation of the diversity of the discussion.



**Craig Soudien (Deputy Vice-chancellor, UCT)**

*'We have a collective responsibility to evolve this (NEEDU).'*

**Dr Francine De Clercq (Senior Lecturer, WITS)**

*'We need to develop our own evaluation model.'*



**Dr Martin Prew (CEO: Centre for Education Policy Development)**

*'Districts are critical for broad-based, system-wide school improvement.'*

*'Districts became the dumping ground for principals and local politicians whom no one could get along with.'*

*'It is important to benchmark our performance internationally.'*



**Carole MacBride (Head of Consultancy: CfBT Education Trust)**

*'Independence is the soul of the inspectorate. If the inspectorate is not perceived as being independent its findings are seen as being compromised.'*

*'Inspection does not improve schools.'*

*'Inspection must be diagnostic, it is not enough to report on what it is like, one must also be able to explain why it is like it is.'*

*'Inspection is not necessarily a panacea for underperformance. Finland, which has one of the best performing school systems, does not inspect its schools.'*

*'Schools don't know what they don't know – they don't know what good looks like.'*

*'Inspection alone is not enough; it is like weighing the baby but not fattening it.'*



**Dr Nick Taylor (Senior Researcher, JET)**

*'The top schools are going to teach NEEDU how schools should be run, the bottom 15% of schools should simply be closed.'*

*'NEEDU needs to help schools to help themselves by laying the foundation for development.'*



**Bobby Soobrayan (Director-General of Basic Education)**

*'Education in South African is not performing at levels commensurate with its level of development as a country.'*

*'Evaluation is a central element of the current administration's approach to achieving its goals. Every department of state is required to set and achieve clearly defined measurable outcomes.'*



**Mr Lieven Viaene (Inspector General: Government of Flanders), commenting on South African Education as a critical friend:**

*'You are good at policy formulation but poor at implementation.'*

*'Stop the squealing of the pig and give it something to eat.'*

*'NEEDU must be able to function in an independent way. It must also be able to listen; to find out what works and what doesn't; it must point out where it found problems and who is responsible; it will need to adapt; and it will need to make space to deal with issues of inequality and equity.'*



**Mrs Angie Motshekga (Minister of Basic Education)**

*'When we mapped the Education Roadmap in 2008 we resolved to "ensure effective evaluation of all teachers based on the extent to which learner performance improves". The launch of NEEDU gives effect to this commitment.'*

*'I must highlight that in all aspects of the school and its surrounding community, the rights of the whole child, and all children, to survival, protection, development and participation are at the centre.'*

*'They (schools) are the most important unit in our work and the success of our sector should be judged by their performance and all our activities should be targeted at supporting schools and making them work.'*



**Ron Swartz (Independent consultant. He has previously served as Superintendent-General of the Western Cape Education Department and has acted as S-G for the Eastern Cape Education Department)**

*'In breaking down the apartheid system we destroyed all leadership and management capacity as well as all monitoring and evaluation systems.'*

**National Association of Professional Teachers of South Africa (NAPTOSA)**

*NEEDU must break with the checklist approach – quality is not the sum of items on a checklist.'*

**Dr Jannie Bredl, Suid Afrikaanse Onderwysers Unie (SAOU)**

*'NEEDU was established in terms of an ELRC agreement with the agreement and support of all unions.'*

*'There is a need to attend to labour shortcomings in terms of a sufficient supply of appropriately qualified*



**John Moleku, South African Democratic Teachers Union (SADTU)**

*'There is insufficient local research data to inform the evaluation and monitoring processes.'*  
*'The DBE spends too much on the bureaucratisation of its structures and too little on research.'*  
*'Without proper research we are shooting in the dark.'*  
*'We need think-tanks not politburos.'*  
*'We are not against evaluation, we are against the methods used to evaluate our teachers in a way that demoralises them.'*  
*'Is NEEDU simply not adding another layer of bureaucracy and will it not end up diverting scarce educational resources away from schools and classrooms?'*  
*'Does NEEDU measure up to Polokwane resolution 42?'*  
*'NEEDU should rather be called NEEU as there is no commitment to Development.'*  
*'We want NEEDU to be successful.'*  
*'Will evaluation alone remedy the crises in our education system?'*

**Umalusi (Council for Quality Assurance in General and Further Education and Training)**

*'Umalusi celebrates the launch of NEEDU.'*

**Education Training and Development Practices Sector Education and Training Authority (ETDP Seta)**

*'The ETDP Seta will be important players in the 'D' part of NEEDU.'*

**South African Qualification Authority (SAQA)**

*'NEEDU must say NEE to the DBE and NEE to the Unions.'*  
*'SAQUA welcomes its establishment – do we need NEEDU? SAQUA says yes.'*

**Governors' Alliance (An association of School Governing Bodies)**

*'Governors' Alliance says "yes".'*

**National School Governing Body Association (NSGBA)**

*'We welcome the establishment of anything ... so long as it improves the quality of education.'*  
*'How does NEEDU anticipate the role of SGBs?'*

*'We are happy that NEEDU will evaluate the system from top to bottom.'*

**Higher Education SA (Dr Gravit, Dean of Education, University of Johannesburg)**

*'We welcome the independence of NEEDU – it needs to guard this independence fiercely.'*

**Ms A Tau (South African Principals' Association)**

*'SAPA supports the establishment of NEEDU and wishes to remind it that it is the principals who in the end must implement any recommendations that are made.'*

**Independent Quality Assurance Agency (IQAA)**

*'There is a need to define in a very precise way what we mean by "quality".'*  
*'NEEDU needs to help schools to identify the good things that they are doing as affirmation is a very important element of any development.'*

**Independent Schools Association of South Africa (ISASA)**

*'We are concerned about the institutional framework of NEEDU. How will it work and who is going to pay for it?'*

**Enver Surtey (Deputy Minister of Basic Education)**

*Quoting a discussion he had with one of the participants: 'Let's not talk about DAS (Development Appraisal System), let's talk about Das Kapital.'*  
*'We need to be "revolutionary activists in education"; we must be willing to do more with less.'*  
*'We need to keep it simple; you cannot have too many systems in one environment.'*



**Prof. John Volmink (NEEDU CEO)**

*At the start: 'We need to take complex things and make them simple.'*  
*'Every learner deserves access to quality education.'*  
*'Schools are the fundamental building block of the education system and change can only happen from within the school.'*  
*'To be accountable means owning one's commitment.'*  
*'The challenge of supporting education in this country is the responsibility of every South African.'*  
*At the end: 'For me today is "magnificent Friday" as it is enormously exciting to be part of establish something new.'*  
 See Prof. Volmink's full address on page 28. ■

# Unwrapping the 'beast': The views of NEEDU CEO Prof. John Volmink

**In his response to Minister Motshekga's address at the NEEDU Inception Conference, Prof. John Volmink, the CEO of NEEDU, articulated his view on the nature, purpose and values of the entity that he must develop and lead. Here is what he had to say.**

**M**inister, Deputy Minister, Director-General, honoured guests: I am very grateful to all who have made it possible for us to reach this point in the NEEDU journey. I am particularly grateful to you Minister for your support and expression of confidence in the mission of NEEDU.

Every child deserves access to a national system of quality education. Quality education is an education that does not only provide access to the gateway subjects of numeracy and literacy but as Prof. Soudien reminded us yesterday, an education that will also provide a gateway to realising democratic values and citizenship and personal empowerment.

But, however we may choose to define 'quality', it will only be possible if every stakeholder is committed to support this vision. In other words, the challenge of improving the quality of education in this country is the responsibility of every South African. Every social partner in the education process must be prepared to embrace and pursue this dream.

In establishing a NEEDU, the State is assisting all the partners with a mechanism to promote and improve quality at schools. The school is a central building block in realising that vision and ultimately change can only happen from within the school.

Central to the notion of quality is the concept of accountability. For me accountability is about owning one's commitment. Schools have a commitment to the learners and their families, to the profession of education and of course to the State. These accountabilities have to be understood, institutionalised and continuously renewed. It is the case that teachers have a natural aversion to 'the inspectorate' in whatever form or guise it might come. However the need for accountability is both necessary and inescapable.

But the focus of NEEDU is not only on schools but also on the district support to make schools work. NEEDU believes that the school district (or circuit) needs to play a key role in making quality education a reality in the system. However we do have concerns about capacity and mandate of districts. This needs to be addressed urgently.

Accountability does not stop at the district level. It includes every level of the education system.

Then there is the debate around the relationship between accountability and development. We cannot have accountability without development. However we have to recognise the administrative separateness of development and evaluation yet appreciating their systemic connectedness.

Much has been said yesterday about evaluation. We had the privilege to learn from the

perspectives of systems in different parts of the world. There was a discussion about the difference between evaluation of, evaluation for and evaluation as. Holding schools, once informed, accountable for the reaching of reasonable and negotiated goals against a timeline must be part of an evaluation system.

However NEEDU's task is to identify weakness/barriers to good functioning schools or areas that need improvement and prioritise these with clear improvement strategies linked to set time frames.

These findings and recommendations should be brought to the attention of the Teacher Development directorate in the DBE. Progress towards this goal can best be obtained and monitored by a combination of self and external evaluation.

I like the quote 'It looks like everybody hates external evaluation while nobody trusts internal evaluation.' (Nevo, 2001)

NEEDU focuses on evaluation for development and support. To this end the Whole School Evaluation and the Quality Learning and Teaching Campaign should ideally be subsumed under NEEDU. This needs further discussion with the DBE.

The fitness of purpose of NEEDU has been well argued in various fora including yesterday's discussion and in the Ministerial Report. The design features of NEEDU deal with its fitness for that purpose. Crucial features of the design are the independence of NEEDU and the professionalism of its staff. These are critical for its credibility.

In order for NEEDU to be viable it also needs features that can articulate with the line function structures of the Department of Basic Education all the way down to schools. Thus the issue of sufficient capacity needs urgent attention.

It is crucial that NEEDU be taken from strategic intent to operational reality with immediate effect. To this end there are many other tasks and activities that should be carried out immediately. This includes identifying the core operations and how will they function.

Without the confidence and acceptance of all involved in education, no evaluative-based system will work – it will in fact be counterproductive. Taking into account that instruments for evaluation and accountability are notorious for developing a culture of compliance and complicity rather than generative learning, we need to ensure buy-in by all stakeholders. This requires extensive advocacy and other credibility-building measures.

I am therefore deeply grateful to the Minister and the DG for your support and look forward to the challenge of taking NEEDU to the next phase. ■

# Basic Education Portfolio Committee oversight visit to the Eastern Cape and KwaZulu-Natal

The oversight visit to schools in the Eastern Cape and KwaZulu-Natal by members of Parliament's Portfolio Committee for Basic Education provides an interesting perspective on the state of education in those two provinces at the start of this year.

As part of their work, members of Parliament's portfolio committees are expected to visit a range of communities and institutions from across the country whose needs and interests they are expected to represent. In January this year, as part of these duties, members of the Basic Education Portfolio Committee visited schools and district offices in the Eastern Cape and KwaZulu-Natal to learn more from principals, teachers and district officials about how they experience education on the ground. The report of this visit was released on 22 February and can be downloaded from the Parliamentary Monitoring Group's website<sup>1</sup>.

In the Eastern Cape the group concentrated its efforts in the Ntabankulu district, which forms part of the Alfred Nzo District Municipality, and visited the Ntabankulu Circuit Office, where it met with members of the Provincial Legislature and officials of the National Department, Provincial Department and the Provincial Legislature. They also visited Ntsikayezwe Senior Secondary School where they held discussions with teachers, principals, union representatives and parents, as well as with representatives of school governing bodies and members of the local community. In KwaZulu-Natal, they visited Bergville in the Uthukela Education District and had meetings with similar groups of stakeholders at Khokhozane Primary School and Mpumuzi Primary School.

In part these visits were to assess the state of readiness of schools for the start of the academic year and also to appraise the extent to which earlier storm damage affected school and community infrastructure in these two districts.

### The Eastern Cape (Ntabankulu Circuit)

Challenges in the Eastern Cape that were identified by the Hon. M Mrara, Chairman of the Education Portfolio committee of the Eastern Cape Legislature, included the following:

- financial constraints as a result of the provincial department having exhausted its 2010/2011 budget of approximately R24 billion together with over-

expenditure of nearly R1.6 billion

- the suspension of the School Nutrition Programme as a result of the 'mismanagement of funds'
- the suspension of the Scholar Transport Scheme (Budget R300 million), with the exception of the provision for farm schools, as a result of 'mismanagement and corruption'
- non-payment of service providers who were owed money by the ECED and could not be paid
- the suspension of 'at least' 3 000 temporary teachers. Some schools in the province have up to 50% of their teachers in temporary posts and these schools were unable to function as a consequence.
- tensions created as a result of the employment of foreign teachers who were perceived to be limiting the employment prospects of unemployed teachers and those occupying temporary posts
- an administration that was considered to be 'generally corrupt and which needed to be overhauled'. The Portfolio Committee delegation heard allegations that syndicates operated with the assistance of government officials to acquire tenders to provide services. This has led to tenders for the distribution of Learner and Teacher Support Materials (LTSMs) having to be cancelled, leaving at least 1 100 schools without stationery and workbooks. There were also ongoing investigations into the dumping of R3 million worth of stationery.
- learners experiencing difficulty in gaining admission to higher education institutions (HEI) partly as the result of the use by HEIs of 'points systems' in their admission criteria. The result was a low enrolment of approximately 14 000 students in the FET sector, well below the 2014 target of an enrolment of 80 000 students.

It was the view of the Hon. Mrara that for these reasons amongst others the schools in the Eastern Cape were not adequately prepared for the new school year.

At the meeting at Ntsikayezwe Senior Secondary School principals from the district raised the following concerns amongst others:

- There was a lack of adequate infrastructure at most schools, including the absence of laboratories, libraries and computer rooms, and poor maintenance, which in some instances posed a danger to both learners and educators.
- Primary schools were perceived to be being given priority over high schools.
- Delays in the payment of Norms and Standards funding for schools disrupted planning.
- The suspension of temporary teachers and the School Nutrition Programme had been disruptive.
- Many roads and bridges were in a poor state of repair, which resulted in increased learner absentee rates in rainy weather.
- Most schools were neither fenced nor electrified.
- There was a need for more administrative staff to reduce the administrative load of teachers who were sometimes required to perform administrative duties during teaching time.
- Rhwantsana Junior Secondary School, which was damaged by a storm in 2009, had still not been repaired and as a result learners sometimes had to study under trees. Both the ECED and the DBE were aware of this and the DBE had committed to building a library at the school. The complainant however suggested that it would be better to first build the classrooms that the school desperately needed.
- Many schools did not have access to the basic necessities such as clean water and proper ablution facilities. Where renovations and addition were done, the work was often left incomplete as a result of fraud and corruption.
- The furniture provided to schools, such as desks and chairs, was mostly of poor quality and did not last.

Most of the responses by the ECED and DBE officials who accompanied the delegation and which are carried in the report are typically political (promises of better things in the future) or bureaucratic (we are unable to do this because it is the responsibility of some other department or sphere of government). Some interesting data was included in the responses, however, which included a significant difference in the figures provided by the DBE and ECED on the number of mud schools in the province – the DBE suggested

there were 395 mud schools while the ECED gave the numbers as 559!

Some of the PED officials expressed concerns about how schools were spending their allocated funds. They used Ntabankulu as an example of this based on records provided by the district office, which showed that the school has spent some of its stationery budget on municipal services that were not provided, on maintenance and on paying individuals to protect the school premises. The school, which is designated as a Quintile 1 school, has an enrolment of 644 learners and a Norms and Standards allocation of R238 000. Its staff complement is a principal, a deputy principal, three heads of department and 15 educators.

*The Portfolio Committee delegation heard allegations that syndicates operated with the assistance of government officials to acquire tenders to provide services. This has led to tenders for the distribution of Learner and Teacher Support Materials (LTSMs) having to be cancelled, leaving at least 1 100 schools without stationery and workbooks. There were also ongoing investigations into the dumping of R3 million worth of stationery.*

#### **KwaZulu-Natal**

In KwaZulu-Natal, the delegation looked specifically at the challenges faced by two primary schools and in both cases at least part of the problem was environmental.

Khokhozane Primary School is one of a number in the province that was adversely affected by storms and flood damage at the start of the year. The school has also not been properly repaired following storm damage in 2010. The flood and storm damage had also affected the local infrastructure, with swollen rivers and damaged roads and bridges preventing children from the village it serves from getting to school. The school had also not yet received its stationery allocation for the year and the promised workbooks had not been delivered. For some reason Khokhozane was also not a beneficiary of the School Nutrition Programme and the province did not provide a Scholar Transport Service to learners. The school has no proper ablution facilities and does not have a ready supply of clean running water. The lack of clean running water and ablution facilities are, apparently, common problems for schools in this district.

Mpumuzi Primary School faced similar problems, which are exacerbated by the fact that it is situated at the top of a hill and is as a result more vulnerable to storm and wind damage. A learner at the school was reportedly killed when a structural beam collapsed on him during a storm. Leaks in the roof are so bad that water runs down the inside of the walls when it rains and into electrical sockets, exposing learners to possible electrocution.

*The lack of clean running water and ablution facilities are, apparently, common problems for schools in this district.*

### Portfolio Committee Recommendations

Based on its findings, the Portfolio Committee made a number of recommendations to both the DBE and the two PEDs concerned.

These included the following:

- There was a need to review the quintile system and to ensure that as part of the review process inconsistencies in the classification of schools were eliminated.
- The DBE should submit time frames to the Committee for its strategy to eradicate mud schools.
- Intergovernmental relations needed to be strengthened to improve service delivery, particularly where this cut across juristic boundaries. Relationships between schools and municipalities also needed to be improved in order to ensure that municipal services are provided to schools.
- The delivery of Learner and Teacher Support Materials (LTSM), including workbooks, needs to be improved to ensure that all schools have the required LTSMs on the first day of school.
- The Department should monitor school spending to ensure that spending is in line with prescribed funding allocations.
- The DBE should intervene in the Eastern Cape, as a matter of urgency and deal with the province's many administrative and financial problems, as these were undermining the ability of its schools to provide education of an acceptable standard. These interventions should include:
  - an immediate lifting of the suspension on the employment of temporary teacher and their re-instatement
  - the re-introduction of the School Nutrition Programme and the Scholar Transport Programme for all learners who qualify.
- The ECED should submit reports to the Committee on the findings of the investigations of the mismanagement of funds of the School Nutrition Programme and the Scholar Transport Programme together with the steps it plans to take to address the recommendations made by the Committee.
- The Department of Higher Education and Training should consider re-opening Teacher Training colleges.
- Schools in the Ntabankulu area should be integrated into the Mt Frere District because of the distance (approximately 180 km) between the schools in this area and their district office in Lusikisiki.

- The DBE should monitor the extent to which the KwaZulu-Natal Education Department:
  - made sure that access roads and bridges necessary for learners to reach their schools were usable during rainy weather
  - responded promptly to reported flood damage to schools by taking immediate action to repair the damage
  - delivered LTSMs on time.
- The two provinces should identify and submit the names of all mud schools to the DBE so that these could be eradicated as part of the DBE's programme aimed at eliminating all mud schools.

The final request of the Committee was for the Department to submit within 10 days, in writing, updates on the progress that had been made in respect of all recommendations. ■

### SM&L Comment

The oversight visit by Parliament's Portfolio Committee for Basic Education is a good example of the kind of work that committees of this kind should be doing as part of their responsibility of holding the executive to account, and we would like to see this happening more often.

Education in the Eastern Cape has been in a mess for a number of years and it should not have taken this long for the DBE to intervene. We have no doubt that the visit by members of the Portfolio Committee to the Eastern Cape contributed to the Minister's decision to intervene there. We hope that the Portfolio Committee will 'stay on her case' as the saying goes and also on the case of the ECED whose work has for too long been subverted by powerful and corrupt political heavyweights and senior officials who have become adept at using its dysfunctional systems to defraud it of millions of rands' worth of public money.

We trust that the Minister's decision to intervene is going to lead to a full and thorough shake-up of the system, including the deployment of senior officials of integrity from outside the province who have the courage, will and competence to deal with the incompetence and inertia that is endemic to the system. We also hope that the Minister will demonstrate the political will in her support of these officials when they are forced to make tough and unpopular decisions that are an inevitable part of dealing with organisations that have become as dysfunctional as the ECED.

### References

- 1 <http://www.pmg.org.za/programmes/comreports>

The 17th Annual Conference of the South African Principals' Association (SAPA) will take place from Thursday 22 September to Saturday 24 September 2011 at Durban's Nkosi Albert Luthuli Convention Centre.

The conference theme is inspired by a quotation from John Quincy Adams, the sixth president of the USA (1825–1829): 'If your actions inspire others to dream more, learn more, do more and become more, you are a leader.'

The speakers who have been invited to make presentations are people who the conference organisers believe will be able, through their varied experiences, to inspire principals to 'think out of the box', to broaden their horizons, to dream more and in turn inspire and motivate educators and learners in their schools to achieve more.

#### Confirmed keynote speakers include:

- Minister of Basic Education, Mrs Angie Motshegka
- Sihle Khumalo, who after 10 years in the corporate world gave up a lucrative job to travel through Africa from Cape to Cairo on public transport
- Igno van Niekerk, a businessman, freelance journalist, motivational speaker and photographer who lectures at the University of the Free State on Strategy, Company Analysis and Leadership
- David Williams, a former teacher, and an author, broadcaster and journalist who until May 2010 was deputy editor of *The Financial Mail*. David is currently Director of King Edward VII School and has done much work in assisting schools in rural areas of the Eastern Cape. He will share his views on what constitutes 'a quality public education'.
- Dr Gcina Mhlope-Bekker, an award-winning poet, playwright, performer, motivational speaker and one of South Africa's best-loved storytellers. Her award-winning book *Have you seen Sandile?* is used as a set book in many high schools.
- John Gatherer, who has over 30 years in Human Resource Management and Leadership experience including senior posts at the Anglo American Corporation and the De Beers Group. He recently

joined Debbie Craig at Catalyst Consulting. He and Debbie have co-authored a book entitled *I am talent*, which focuses on how students can optimise their personal effectiveness in the workplace and make their education relevant.

#### Break-away session speakers include:

- Dr Kim Domingo, a psychiatrist who runs a busy private practice in Durban North with special interests in the field of maternal health, child and adolescent psychiatry. She will be sharing her experience in 'dealing with the new-age parent'.
- Advocate JM Reyneke, a senior lecturer in the Law of Procedure and Evidence at the University of the Free State, who will speak on 'Discipline in schools and in particular the concept of restorative justice'
- Professor Rika Joubert, an associate professor in the Department of Education Management and Policy Studies at the University of Pretoria and Director of the Interuniversity Centre for Law, Leadership and Policy. Her special interests include safety in schools and its legal implications.
- Alison Kitto, a retired teacher and ex-principal who currently serves on the Mathematics Curriculum Panel and who was involved in the drawing up of the CAPS document. Alison will share her experience of effective mathematics teaching.
- Hans Scriba, managing director of the Sharks Academy in Durban. Along with a few Sharks stars he will speak about the benefits of running sports programmes in schools and how sport can change lives.
- Mike Saunders, an internet strategy consultant and a social media coach. Mike encourages principals to embrace social media and explores the impact that social media has had on schools and businesses. ■

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