

**TEACHING TOWARDS OUTCOMES AND ITS
EFFECT ON ASSESSMENT PRACTICES IN A
LANGUAGE, LITERACY AND
COMMUNICATIONS CLASSROOM**

by

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ABSTRACT

The purpose of the research documented in this report was to consider the tensions that exist between a change in curriculum policy and the resultant methodological and assessment practices. An input-process-output model (Shavelson and Taylor, 1999) was used to identify the elements of the educational system pertinent to the study. These were identified as: policy as an input and teaching methodology and learning and assessment as the process of the educational system. Thereafter a single-respondent case study was selected to focus the purpose of the research by considering how the perceptions, understanding and experience of the changed curriculum policy of teaching towards outcomes has affected the nature and purpose of assessment, as viewed by an educator teaching at Grade 9 level in the General Education and Training (GET) band.

An educator teaching at Grade 9 level in an Independent secondary school in South Africa was selected as the single-respondent case study. The study was defined as an *instrumental case study* operating within the Interpretive paradigm. An educator teaching at the Grade 9 level was selected as a result of Grade 9 becoming a possible exit point in education as well as being the final year of the senior phase of the GET band. For this reason, the impact of a changed curriculum is felt most acutely at this point due to the implementation of the Common Tasks for Assessment (CTAs). In addition, an Outcomes-Based Education (OBE) teaching methodology as well as an Outcomes-Based Assessment (OBA) methodology is required at this level because of the portfolio of evidence that is required to be gathered for each learner in Grade 9.

The study is referred to as policy-orientated as it seeks to understand educational change by examining an educational model of provision and operation without the intention to generalise the results. The results indicate that

the change in curriculum policy does not necessarily alter teaching methodology. However, in the instance of this research, teaching methodology and assessment, relating to the respondent's teaching process, are linked and can be seen as aspects of the learning process. Lastly, the research does not clarify to what extent assessment methodology influences the outcome of learning; however, it does seem that assessment impacts on the learning process.

Key words:

assessment; curriculum reform; education system; knowledge; Outcomes-Based Education; policy; skills; teaching methodology; teaching style; teaching practice.

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TABLE OF CONTENTS

ABSTRACT	I
ACKNOWLEDGEMENTS	III
LIST OF TABLES	VII
LIST OF FIGURES	VIII
CHAPTER ONE	1
1 Introduction to the Study	1
1.1 Overview	1
1.2 The Background and Context of the Inquiry	2
1.2.1 A Changing Curriculum	2
1.2.2 A Paradigm Shift in Assessment	6
1.3 Problem Statement	8
1.4 The Research Question	11
1.5 Rationale of the Inquiry	11
1.6 Conceptual Framework Underpinning the Investigation	14
1.7 Research Strategies Used for the Study	16
1.8 Limitations of the Study	17
1.9 Conclusion	18
1.10 Outline of the Report	19
CHAPTER TWO	21
2. Inputs and Processes in an OBE System	21
2.1 Introduction	21
2.2 Inputs into the Education System	21
2.2.1 Principles Informing Curriculum pre 1994	21
2.2.2 Background to the Implementation of OBE in South Africa	23
2.2.3 Principles Informing Curriculum post 1994	24
2.2.4 Implementation of C2005	25
2.2.5 Policy Implementation in the late 1990s	26
2.3 Processes in the Educational System	28
2.3.1 Assessment as a Process and a Practice	28
2.3.2 Assessment Prior to OBE	30
2.3.3 Assessment: C2005 to the Revised National Curriculum Statements	31
2.3.4 The Relationship between Curriculum and Knowledge	33
2.3.5 The Relationship between Curriculum and Assessment	34
2.3.6 The Role of outcomes	35
2.3.7 The Relationship between Outcomes and Assessment	36
2.3.8 Why quality assurance has been developed	37
2.4 Conclusion	38

CHAPTER THREE 40

3	Research Design and Methods Applied During the Study	40
3.1	Introduction	40
3.2	Research Paradigm	41
3.2.1	The Interpretive Paradigm	41
3.2.2	Application of the Research Paradigm to the study	42
3.2.3	The Link between Constructivism and the RNCS Application and Implementation	44
3.2.4	The Link between Behaviourism and OBE	45
3.2.5	Rationale for the Interpretive Paradigm in a Constructivist-Behaviourist context	46
3.3	Research Design	47
3.3.1	Case Study	49
3.3.2	The Instrumental Case Study	52
3.4	Research Methodology - A Qualitative Approach	53
3.5	Site Selection and Sampling	55
3.5.1	The Site	55
3.5.1.1	Administrative Requirements of Government versus Independent Schools	55
3.5.1.2	The Independent school where the study was conducted	56
3.5.2	The Sample	57
3.5.2.1	The respondent as a sample	57
3.5.2.2	The sample of learners	58
3.6	Data Collection	59
3.7	Instruments	60
3.7.1	Questionnaires	60
3.7.2	Interviews	61
3.7.3	Observation	64
3.7.4	Document Analysis	65
3.8	Data Analysis	65
3.9	Validity and Reliability	66
3.9.1	Triangulation	67
3.9.2	Member Checks	68
3.9.3	Rich Description	69
3.10	Ethical Statement	69
3.11	Conclusion	70

CHAPTER FOUR 72

4	Research Results and Analysis	72
4.1	Introduction	72
4.2	Developing Categories for Data Analysis	72
4.2.1	Identifying Categories for Data Analysis	74
4.2.2	Identifying Subcategories within Main Categories	76
4.2.3	The Linking of Subcategories for Data Analysis	78
4.2.3.1	Discussion of the factors impacting on teaching practice as a result of policy change	79
4.2.3.2	Discussion of the factors impacting on the teaching environment	88
4.2.3.3	Discussion of the factors influencing the teaching process	97
4.2.3.4	Discussion of the factors influencing the learning process	103
4.2.3.5	Discussion of the factors influencing the assessment process	110
4.3	Conclusions drawn from the case study	117

CHAPTER FIVE	122	
5	Summary of the Main Findings, Recommendations and Implications of the Study	122
5.1	Synopsis of Results	122
5.2	Summary of the Research	125
5.3	Discussion	128
5.3.1	Methodological Reflection	129
5.3.2	Substantive Reflection	130
5.3.3	Scientific Reflection	133
5.4	Recommendations	134
5.4.1	Policy and Practice	134
5.4.2	Further Research and Developmental Work	136
REFERENCES	138	
APPENDIX A – ETHICAL CONSIDERATIONS	147	
APPENDIX B – OBSERVATIONS	150	
APPENDIX C – RESPONDENT QUESTIONNAIRE	158	
APPENDIX D – RESPONDENT AND LEARNER INTERVIEW SCHEDULES	163	
APPENDIX E – INTERVIEW TRANSCRIPTS	171	

LIST OF TABLES

Table 4.1: Criteria for the creation of categories	75
Table 4.2: Coding system explaining the factors impacting on teaching practice as a result of educational policy.	76
Table 4.3: Coding system explaining the factors impacting on the teaching environment.	77
Table 4.4: Coding system explaining the factors influencing the teaching process.	77
Table 4.5: Coding system explaining the factors influencing the learning process.	77
Table 4.6: Coding system explaining the factors influencing assessment practices.	78

LIST OF FIGURES

Figure 4.1:	Conceptual Framework applicable to this study	74
Figure 4.2:	Policy and the relationship between its subcategories	79
Figure 4.3:	Environment and the relationship between its subcategories	88
Figure 4.4:	Teaching and the relationship between its subcategories	97
Figure 4.5:	Learning and the relationship between its subcategories	103
Figure 4.6:	Assessment and the relationship between its subcategories	110

CHAPTER ONE

1 Introduction to the Study

1.1 Overview

This report details the procedure, methods and results of a single-respondent instrumental case study of a Language, Literacy and Communication educator teaching at a co-educational, independent school in South Africa. The intention of the study was to gain insight and understanding into the effects that a theoretical shift in educational philosophy and therefore policy, can have on the practice of classroom assessment in the above-mentioned Learning Area. The study can be referred to as policy-orientated as it seeks to understand educational change by examining an educational model of provision and operation. This is achieved by investigating the product of the system as well as the process at work in a particular context (Keeves & Adams, 2000).

The case study was used as a vehicle to better understand the impact that curriculum reform and the resultant policy changes have on teaching methodologies, and in turn, the effects on assessment practices. In particular, the focus of the inquiry was to explore how the policy of teaching towards outcomes has affected the nature and purpose of assessment as viewed by an educator teaching at Grade 9 level in the General Education and Training band.

In 1997, Curriculum 2005 (C2005) was launched as the “new curriculum” in South African schools (Department of Education, 1997). Underpinning the new curriculum was the theory of Outcomes-based Education (OBE). The paradigm shift implied by OBE in C2005 had a vast impact on teaching and learning strategies. In order for the curriculum to be implemented, the Department of Education had to develop a number of policies for implementation by educators.

Literature relating to the implementation of C2005 and OBE suggests that many educators experienced difficulty, frustration and anxiety in implementing new teaching and assessment strategies (Mahomed, 1999; Rasool, 1999; Jansen, 1999). The purpose of this study was to explore the experience, perception and understanding of an educator to better understand how the new curriculum policies, and in particular, the teaching towards outcomes influenced her teaching methodology and in turn her assessment practices. It is hoped that the study will also elucidate why tensions exist between policy and practice.

This chapter introduces facets of the educational cycle that underpin, and are fundamental to, the rationale for developing the study as indicated in Section 1.5 of this report. Section 1.2 presents the contextual factors, which lead to the implementation of OBE in South Africa and the subsequent paradigm shift that has taken place in policy and practice. A description of the problem as well as the problem statement forms section 1.3. The problem statement in 1.3 is further elaborated upon in a discussion of the conceptual framework in Section 1.6. Section 1.4 presents the research questions from which this study was conducted. The research strategies employed during the study are discussed in Section 1.7. This chapter ends with the limitations of the study in Section 1.8, the conclusion of the chapter in Section 1.9 and an outline of the rest of the report is provided in Section 1.10.

1.2 The Background and Context of the Inquiry

1.2.1 A Changing Curriculum

The factors leading to the implementation of OBE as a curriculum initiative can be articulated from both an international and a national perspective. South Africa, post 1994, was emerging from international isolation into a world widely influenced by globalisation. In order to compete in this arena, South Africa had to take cognisance of how the workplace was being transformed by the

Chapter One

information age. William Spady (1994: 29) elucidates the profound changes that were taking place in the following observation:

That world of 'the steady job' and 'lifetime career' seems to be over. In its place has emerged the complex, high-technology, competitive, unpredictable, and globally interdependent marketplace that is demanding constant change, adaptation, learning, innovation and quality from its members.

Globalisation was manifesting in South Africa and the effects thereof were being articulated in reports presented by the Department of Labour. These changes were to have a significant effect on work and living patterns and this, therefore, needed to be reflected in the curriculum. It was clear that the then current curriculum was not keeping pace with "globalising patterns of modern life" brought about by the technotronic, information age (Mahomed, 1999: 160). Thus C2005 became the vehicle for empowering learners with the skills of lifelong learning through a national curriculum framework in order to articulate the vision of South Africa as, "A prosperous, truly united, democratic and internationally competitive country with literate, creative and critical citizens." (Department of Education, 1997: 1).

On a national level, OBE as a tool for curriculum reform in South Africa, must be recognised as part of a political agenda aimed at promoting social transformation. Skinner (1999) questions whether or not education can ultimately achieve this, but does not seek answers to the possibilities she raises, instead leaving the topic open, debating only current issues and leaving the future to judge whether or not education can effect these changes. Jansen (1999: 147), however, asserts that OBE will fail, not as a result of "politicians and bureaucrats [being] misinformed about conditions of South African schooling, but because this policy is being driven in the first instance by political imperatives that has little to do with the realities of classroom life." Despite the naysayers and their concerns of OBE policy being part of a political agenda, OBE

as a philosophy continues to underpin the national curriculum. The Revised National Curriculum Statements (RNCS) are in the final stages of roll-out, having been implemented in the Foundation and Intermediate Phases, with the Senior Phase following in 2006. Jansen's concerns about political agendas are relevant, in particular his reference to the realities that are faced in the classroom. Allied to this is the pressing reality of the practical implications of OBE and assessment.

National and provincial departments of education published a vast number of official documents; however, what was notably missing was an understanding of the relationship between the process of reform and the implementation, the players within the process, and the intended outcomes (Baxen & Soudien, 1999). As Baxen and Soudien so insightfully asked, where does the ownership of this curriculum lie? There are question marks about who manages the process. Teachers feel that their concerns about how the new system affects their understanding of education and their methodologies at the most fundamental level are not being considered, and for this reason, their professional identities and confidence are shaken.

In response to the implementation of OBE in South Africa, literature has been written which traces the problems associated with this implementation (Christie, 1999; Jansen, 1999; Vandeyar & Killen, 2003). Amongst the associated problems is the lack of an ongoing process, which allows teachers to come to terms with and make sense of OBE as curriculum policy. According to Jansen (1999), this has marginalised teachers and the fragmented, or lack of, support from officials has merely exacerbated the situation. Coupled to this, as articulated by Potenza and Monyokolo (1999) is the complexity of the curriculum documents, which have intimidated teachers and made them think that everything they have done in the past is wrong. In order to alleviate this problem, teachers need to be effectively trained and supported in order to facilitate their delivery of the new curriculum. If this does not become a national priority, the

Chapter One

implementation of the new curriculum will flounder (Potenza and Monyokolo, 1999). What begins to emerge from the debates surrounding OBE as curriculum reform are the tensions between policy and practice.

As an educator who was involved in the implementation of C2005 – and currently the implementation of the RNCS – and who works in curriculum development at the school where the case study was carried out, I became aware of the low morale and frustration of educators. Through discussions, it became apparent that this was because of insecurities about implementing OBE. I began considering what it was about OBE that was so threatening and, through informal discussions, determined that personal experience, introduction to OBE and curriculum policies as well as perceptions of what OBE is were central to the problem.

Further investigation into this problem, which faces education, became the focus of this investigation; however, a research methodology had to be selected. Case studies, as indicated by Cohen et al (2000), focus on individuals and seek to understand their perceptions. They therefore see the situation through the eyes of the participant, recognising that individuals have their own unique experiences of the world around them and therefore different interpretations. Having read this definition in the literature, the single-respondent case study was the logical choice for the research design of this study. The most relevant candidate to use as a case study was an educator teaching at the Grade 9 level of the General Education and Training (GET) band, as this is where the majority of the impact of implementation in relation to assessment was being felt. As I am a specialist in Language, Literacy and Communication: English Home Language, it was in this learning area that the study was located.

1.2.2 A Paradigm Shift in Assessment

For the purposes of this study, it is essential not only to view curriculum change from an ideological perspective, but also at the chalk face implementation level. It is at the chalk face where the paradigm shift not only had to take place, but implementation had to occur. For the implementation of OBE through the framework of C2005, the transformation of teaching and learning was imperative. As a result of the paradigm shift and changes in education policy, educators have been expected to implement new teaching, learning and assessment strategies in the GET Phase. The paradigm shift in assessment, as suggested by the Department of Education (1997a: 3), was to be brought about by, “a move from the judgemental to the developmental role of assessment”, and continuous assessment (CASS) would facilitate the achievement of this paradigm shift. In order to understand the impact of OBE on teaching and assessment methodologies, it is essential to examine how teachers structure their learning programmes as well as how they perceive assessment and its role in the process of teaching and learning.

While C2005, the RNCS and the C2005 Assessment Guidelines provide structures for assessment that are conversant with principles of quality assessment, issues such as reliability, validity and fairness, which are exemplified in the Curriculum Standards, are not always made explicit. This has led to a great deal of debate surrounding the implementation of Outcomes-Based Assessment (OBA) as educators are uncertain as to when, how and why they should assess. Studies (Vandeyar & Killen, 2003) have shown that if educators misunderstand, ignore or are not trained effectively in high-quality assessment practices, they produce data that is inaccurate and uninformative to the learner and the learning process. If this is the case, a question mark begins to emerge as to whether or not educators are indeed using the outcomes-based principles of *clarity of focus* and *design down* when planning learning

Chapter One

programmes and assessment strategies, or if they are simply paying lip service to policy.

Having been involved in education prior to and during the implementation of OBE, I have been aware of the changing role and nature of education. I am aware of the outcomes-based view that the process of learning is as important as the content. As stated in the Revised National Curriculum Statement (RNCS) Grades R-9 (Schools) Policy (Department of Education 2002b: 11),

Both the process and the content of education are emphasised by spelling out the outcomes to be achieved at the end of the process. In the RNCS learning outcomes and assessment standards were designed down from the critical and developmental outcomes.

The principles espoused in the RNCS are consistent with the four OBE principles established by Spady (1994) *clarity of focus*, *expanded opportunity*, *high expectations* and *design down*, are the fundamental OBE principles on which the South African curriculum has been developed. However, what is of interest to me is that while the principles of teaching towards outcomes are present in education policy, I question how they are being implemented in practice and how they affect other aspects of the teaching and learning process, such as assessment.

The role of assessment as an aspect of the new curriculum, in particular at the senior phase (GET), has also undergone radical changes because

The principles of OBE that advocate that assessment should be based on the following principles: Design Down, Clarity of Focus, High Expectations and Expanded opportunities. When planning assessment, educators must start by identifying outcomes to be assessed from those that are to be addressed through teaching and learning. (Department of Education, 2002: 3).

Traditional assessment has been an endpoint in education - a measure of knowledge at a certain point in time e.g. final year exams and, ultimately, the final Grade 12 (final year of secondary schooling) examinations. While, to a degree, this is still the case in Grades 11 and 12 (2006 has seen the implementation of the National Senior Certificate in Grade 10 which is conversant with the GET), there has been a paradigm shift in the curriculum and assessment practices at the GET level. Assessment is now viewed as an integral aspect of teaching and learning.

While educators are incorporating the new curriculum into their teaching practices, they are still experiencing difficulty understanding the imperative to use and implement a variety of assessment methods to assess the critical and specific outcomes. Educators' teaching practices have been influenced by the new curriculum, but in order to understand their assessment methodology, it is critical to examine how teaching towards outcomes has affected their assessment practices. This study will explore the experience of an educator to gauge how the new curriculum policies, and in particular how teaching towards outcomes as well as her understanding and perceptions thereof, influences her teaching methodology and in turn her assessment practices. It is intended that the study will shed some light on teaching practices in the light of policy decisions despite the description by Lubisi and Murphy (2002: 255) that, "explaining the situation in education in general, and assessment in particular, [is] rather like an attempt to hit a moving target".

1.3 Problem Statement

The intention of this study is to reflect on two aspects of OBE: outcomes and assessment, and consider how educators are applying the policy regarding these concepts to their teaching practice. When reviewing the literature it becomes apparent that the outcomes, critical, specific and learning are clearly articulated in the policy documentation. Assessment, while handled in a cumbersome and

Chapter One

unclear manner in C2005, has been reviewed and is far more streamlined in the RNCS, particularly the assessment standards that have been clearly defined. There is still, however, a gap in policy documents, including the Curriculum 2005 Assessment Guidelines and the National Protocol for assessment, as to how assessments can be integrated to cover single and multiple outcomes and then be recorded as results in a manner that is not only formative but also practicable and manageable. The RNCS states that schools are responsible for developing an assessment process that is valid, reliable and credible and goes on to provide vague, general statements regarding the recording of assessment and, at best, a vague description of the codes used for assessment. What it fails to do is explain how the variety of codes that are suggested can be made compatible in order to have an assessment process that is valid, reliable and credible. The examples of “Managing the Assessment” and possible forms of reporting in the Department of Education Policy Document (1997: LLC – 10 & LLC – 11) indicate a complete lack of practical and workable implementation strategies of assessment.

Education policy states that outcomes are to be addressed through teaching and learning and that the outcomes to be assessed are derived from those addressed through teaching and learning. The problem which arises is that while this may be the focus of policy; because of ineffective roll-out of the curriculum and related problems, as mentioned above, this is not necessarily the practice adopted by educators. The case study designed for this study, therefore, had to take into consideration: an individual educator’s understanding of OBE, their experience of the implementation of OBE in the form of C2005 and the RNCS, their perception of outcomes as well as their implementation of assessing towards outcomes. By considering an educator’s experience in implementing C2005 and the RNCS, this research will highlight the dilemma facing educators when implementing the policy of teaching towards outcomes and the resultant effect it has on their assessment practices.

It can be said that a tension between policy and practice has developed in education - a tension between the initial policy of C2005 and now the policy determined by the RNCS, of teaching towards outcomes and the resultant practice of assessment. The tension exists as a result of policy that has determined a change in teaching methodology without much consideration being given to the required change in assessment methodology on a practical level.

The press has been vocal about the selection of OBE as an educational methodology, citing problems associated with the implementation and subsequent abandoning of OBE internationally, which has raised concerns regarding implementation in South Africa. Educationalists have conducted case studies on educators' operational understanding of OBE and the implementation thereof. They have recorded their findings regarding the implementation of C2005, which has subsequently lead to the development of the RNCS. Despite the revisions, there are still gaps between policy and the practice of classroom assessment and it is from this platform that this study will be initiated. The choice of a case study was therefore the most logical means of investigating the effects of policy change on the experience of an educator as the study was an investigation of a "person's realities" (Stake 2000: 441).

The problem was, therefore, to design a study that would investigate the educator's own teaching methodologies before and subsequent to the implementation of OBE. The study would also have to explore the educator's attitude towards OBE in relation to their understanding of, and exposure to the principles that underpin OBE as an educational philosophy. Central to the study would be an understanding of the educator's perceptions of learning and knowledge. The study would also have to address the educator's conception of assessment in terms of its purpose, design and implementation. Section 1.4 presents the main research question developed to guide the research process outlined in this report, while Section 1.6 gives an overview of the conceptual framework used to underpin the study.

Chapter One

1.4 The Research Question

The sections of this chapter have highlighted the context and problem statement for this study. The following research question was posed in order to guide the study:

How has the policy of teaching towards the achievement of outcomes affected the practice of assessment in Language, Literacy and Communication at the General Education and Training Phase?

The following sub-questions were used to guide the research question:

1. Does a change in curriculum policy necessarily affect a change in teaching methodology?
2. In what way does teaching methodology guide or govern assessment practices in the classroom?
3. To what extent does assessment methodology influence the outcome of learning?

1.5 Rationale of the Inquiry

The purpose of conducting this inquiry was, therefore, to explore the impact that curriculum reform and the resultant policy changes in relation to teaching towards outcomes have had on teaching methodologies, and in turn the effects on assessment practices in a Language, Literacy and Communication classroom. In particular, the focus of the study was to explore by considering the perceptions, understanding and experiences of the respondent, how the policy of teaching towards outcomes has affected the assessment practices of an educator teaching at Grade 9 level in the General Education and Training band. “The

study seeks to increase understanding of how variables relate to one another, to explain better the dynamics of learning, teaching and educational change ... The objective [is] to specify functional or cause-and-effect relationships and outcomes” (Keeves and Adams, 1997: 35). The function of this research is, therefore, not long-term. Rather, it is an attempt, as suggested by Nisbet (2000), to firstly create a theoretical context in which the day to day issues of curriculum policy, as they are perceived, are investigated and secondly to identify the practical problems associated with the assessment towards outcomes within the current educational provision and prevailing views.

An educator teaching at the Grade 9 level of the GET band was selected as the case study for the following reasons:

- The GET band is where the impact of curriculum reform is being experienced at present, as this is where C2005, the Draft National Curriculum Statements and the present RNCS have been implemented.
- As a result of Grade 9 being a possible exit point in secondary education, externally determined assessment tasks have been implemented in the form of portfolio work and Common Tasks for Assessment (CTA).
- The impact of external assessment tasks has influenced the internal assessment practices of educators as pieces of work for the portfolio have to conform to specified criteria.

Curriculum is the core of education and over the past decade has been restructured to reflect the principles and values of a democratic South Africa. In order to achieve this, national curriculum reform initiatives have been implemented, which include: purging the school syllabus of “racially offensive and outdated content” (Jansen, 1999: 145); the introduction of continuous assessment into schools and, according to Jansen (1999: 145), “the most ambitious curriculum policy”, that of OBE.

Chapter One

The implementation of OBE as a curriculum initiative has been the catalyst for much debate (Mahomed, 1999; Rasool, 1999, Jansen, 1999), the scope of which cannot be encapsulated here. It is, however, essential to initiate an exploration of the factors that have contributed to the debate and which have resulted in the concerns that govern this study - the tension between the policy of assessment being linked to the critical outcomes (Department of Education, 1998a) and the practice of assessing the attainment of outcomes. Policy and practice can be regarded as two aspects of an educational cycle that is driven by a number of dynamics: historical, social, cultural, economic and political. These dynamics interact on a variety of levels and influence the theoretical framework in which education in a particular place and at a particular time operates. On a simplistic level, the theoretical framework informs policy; policy determines and informs practice, which in turn informs policy. The implementation of OBE in South Africa is an example of such an educational cycle.

It is hoped that the study will:

- Inform educators in the GET phase who would like to better understand teaching towards outcomes and the assessment thereof in terms of their role in teaching and learning practices.
- Empower educators who want to improve the quality of teaching and learning taking place in their classrooms by reviewing their teaching and assessment strategies.

The study is also pertinent to:

- Curriculum developers developing curriculum standards such as the GETC as well as the CTAs. These are nationally written tests that form a quality assurance instrument at the end of the senior phase, Grade 9.
- National and Regional policy makers designing who are designing policies for the senior phase.

- The study is also useful to the Department of Education (DoE), for designing teacher training programmes and resources for the implementation of the RNCS.
- Teacher training institutions developing curriculum for teachers in training who implement their knowledge both while on teaching experience, and later when they begin teaching. Student teachers would benefit by understanding the practical implications that teachers face when in the classroom and, to this end, could better prepare student teachers.
- In the light of the National Senior Certificate (NSC) being implemented in Grade 10 and the changing curriculum that will be rolled out over the next three years, National and Regional policy makers who design policy for the NSC could be advised of some of the pitfalls that the GET has experienced. They and the Curriculum developers, developing curriculum standards for the NSC, could better prepare policy, implementation expectations and educator support.

1.6 Conceptual Framework Underpinning the Investigation

For a case study to be developed that took into consideration all of the factors mentioned in the problem statement, literature relating to educational change, curriculum, OBE and assessment was reviewed. The literature illuminated three elements of the educational system that guided the study and informed the framework around which the study was designed. These elements were the inputs, processes and outputs of an educational system. The literature clarified the following aspects, which impact on education and are, therefore, key to the study:

- The historical context of education in a country as well as the resultant policy plays an important role in determining curriculum and teaching and assessment methodology.

Chapter One

- The implementation of policy impacts on the process of teaching, learning and assessment in the classroom.
- The intended outcome of teaching and learning and assessment alter as a result of policy change.

The study can, therefore, be considered a study of relationships and processes. While the methodology of the study is qualitative, an understanding of how the variables of teaching, learning and educational change relate to one another can elucidate cause and effect relationships as well their outcomes. Studies falling into this range can be referred to as “input-output studies” (Keeves & Adams, 1997: 35) as in the instance of this study.

The conceptual framework used for this study will combine the frameworks developed by Shavelson and Taylor (1999). In Shavelson’s framework, he categorises elements of the educational system under: inputs, processes and outputs. Thus the study will be located within a framework that clarifies the interrelationships that exist in the educational system. This is essential for the case study as it is because of a change in educational policy (input) that the (process) of teaching, learning and assessment has changed and therefore the (outputs) of the system should theoretically also change. The study is largely concerned with the change in the process aspect of the framework - how teaching towards the achievement of outcomes has affected assessment practices. However, the researcher must remain cognisant of the inputs and outputs of the framework as an intricate and interdependent relationship exists between all of these factors, which governs perceptions of, and decisions made by educators.

In the framework that Taylor (1999) has adapted from Schmidt, Taylor takes into consideration aspects of the school system and the classroom, which is conversant with Shavelson’s framework. However, the addition of the intended, implemented and attained curriculum provides this research with an added

dimension to what are regarded as inputs, processes and outputs. The added dimension of the intended curriculum and the attained curriculum brings into focus the importance of considering what happens in the classroom; classifying the research aims as not only investigating the perceptions and understanding of certain concepts by the educator, but also considering what is effectively carried out in the classroom. This is particularly pertinent to the research as the research question is concerned with how the intended curriculum is implemented and how it affects the outputs.

1.7 Research Strategies Used for the Study

The research for this study is located in the field of education and, more specifically, policy-orientated research. The term policy-orientated research has been applied to this study as its function is instrumental. It seeks to assist with the monitoring of and implementation of educational policy as opposed to the extension of knowledge. As indicated by Nisbet (2000: 211) this kind of research can “enable research to make a more effective contribution to educational practice” by providing the “facts” related to a current educational concern. From this kind of research, politicians, policy makers and educators are able to make judgments based on the empirical evidence that has been provided. It is therefore the purpose of the study, through a systematic study and understanding of the educational process that defines it as policy-orientated.

As the study is an attempt to explore and describe the experience, understanding and perceptions of an individual in relation to their experience of policy, it can be located in the interpretive paradigm. The research design of the single-respondent instrumental case study was therefore selected as it focuses on the individual and seeks to understand their perceptions and unique experience of the world. The case study, therefore, functions as a tool for gaining insight into the perceptions of the individual being studied. As this study deals in perceptions and an individual’s personal understanding, it can be said to be emotive; making

Chapter One

the case study the clear choice for the research design. The research design will be discussed more extensively in Chapter 3.

The data was gathered using interviews, observations and document analysis in the context of an Independent secondary school – the site selection and sampling is discussed fully in Section 3.5. Given the research paradigm in which the study operates in relation to the research design of the case study, a qualitative methodology is used for data analysis. An elaboration of the coding of the data is given in Chapter 4.

1.8 Limitations of the Study

This study has been informed by the case study of one educator, whose views and opinions could be regarded as the views of an individual and not the shared experience of educators in secondary schools. Pursuant to this is that the study was conducted in an independent school, whose conditions are different to those of Government schools. For this reason, the study could be seen to pertain only to Independent schools and not the broader secondary school community. The study focuses on the learning area, Language, Literacy and Communications, and while it is hoped that educators working in different learning areas may have similar experiences and benefit from such a study, a limitation is that educators in other learning areas may have had different experiences because of the nature of their learning area.

Being a staff member at the school where the study was conducted was beneficial as I was familiar with the workings of the school. This was an advantage as I had immediate access to resource files used by the respondent as well as learner records. An understanding of the operational functioning of the learning area in which the educator works also provided insight into the working environment in which the case study was conducted. However, because of my

association with the school, special care was taken to ensure that bias did not impact on the findings of this report.

A final consideration is that I work in a senior management position at the school where the study was conducted. While the relationship with the educator used for the case study is a longstanding one, transparent and professional, careful attention was given to reassure her that the information used for the study would not be used in the school context.

1.9 Conclusion

This chapter has covered the rationale for the research as well as explored issues that underpin the reasons for educational policy change and therefore the change in practice. By considering national and international imperatives, the study has acknowledged the impact of globalisation on education and the subsequent changes to curriculum in order to produce learners who are nationally relevant and globally competitive. The role of political agendas in determining policy can be viewed, from the discussion in this chapter, as placing limitations on policy decisions and the practices resulting from policy change. A further consideration of this chapter was the impact that the paradigm shift, which took place in terms of teaching, learning and assessment methodologies after the implementation of OBE, had on educators. This brought into focus the problem statement as defined by this study as: the dichotomy of the intention of policy and the educator's operational understanding of the implementation of OBE, teaching towards outcomes and assessment in relation to outcomes. Highlighted in the problem statement is that while the policy is clear in terms of defining outcomes and the assessment standards, what is unclear is how to implement the policy in a practicable and workable manner. The study is presented as a single-respondent case study that seeks to investigate and elaborate on the tensions between policy and practice as experienced by an educator teaching in the GET

Chapter One

band in the Language, Literacy and Communications learning area because of curriculum policy change and the implementation of OBE.

The conceptual framework developed by Shavelson and Taylor (1999), which will guide the study, was discussed in terms of the interrelationships, which exist in an educational system. The research question, as stated in section 1.4 defines the parameters of the study and is elaborated on by the definition of the sub-questions. The remainder of this chapter details the implementation of the study in order to record and report on the research question that has been posed.

1.10 Outline of the Report

The report is divided into five chapters defining, in turn, the processes of the research and analyses from which the report is derived. While each chapter defines a specific aspect of the study, they are all interlinked as they are reliant on the information presented in other chapters to form a cohesive whole. Chapter 1 has been summarised in section 1.9 and introduces and provides the imperatives that underpin the study. The literature review, presented in Chapter 2, reports on the change in curriculum policy from a historical perspective as well as defining the changes that took place in relation to practical implementation. This is achieved by considering the aspects of the changed curriculum policy that are the central concern of this study, namely outcomes and assessment. Chapter 3 focuses on the research design and methods that were applied during the study. Firstly, it establishes the epistemological paradigm of the study as interpretive before discussing the research design of the single-respondent instrumental case study. The qualitative methods used to collect and analyse the data are then described. Site selection and sampling are discussed and ethical issues as well as validity and reliability conclude the chapter. Chapter 4 provides the data analysis of the study through the coding and description of the data that was gathered from the interviews, observations and document analysis. The

final chapter of the report reflects on the study and the research process as a whole before drawing final conclusions and making recommendations.

CHAPTER TWO

2. Inputs and Processes in an OBE System

2.1 Introduction

The sections of this chapter denote the areas of interest relating to the study. Each section deals with an aspect of the educational system, but does not operate in isolation. As indicated in the discussion of the theoretical framework of this study (see section 1.6), an interdependent relationship exists between all of these factors.

The background to implementation of OBE in South Africa was selected as the starting point as it provides the reader with a socio-political understanding of the need for educational change in South Africa. Thereafter, the sections evolve according to a timeline of pre OBE, implementation and post OBE implementation. Literature has also been reviewed in relation to aspects driving the study, such as: curriculum, outcomes, assessment and quality assurance, in order to investigate fully the impact these interrelated factors have on one another.

2.2 Inputs into the Education System

2.2.1 Principles Informing Curriculum pre 1994

Curriculum was regarded as central to the education process. As defined by the NEPI Report (1993: 102), curriculum is “the teaching and learning activities and

experiences provided by schools.” The report further defines curriculum as including: aims and objectives; the selection of content to be taught; ways of teaching and learning and forms of assessment. Curriculum in South Africa was previously designed and implemented by the nineteen Education Departments. While the Department of National Education was responsible for determining general curriculum policy, the racially divided departments were responsible for applying and administering curriculum policies. Much of the curriculum development happened in the Department of Education and Culture, with the House of Assembly and the Provincial Departments deciding on the national curriculum. The other Education Departments adapted and developed the core National syllabus. From these observations, it is clear that there was little outside input into the curriculum.

Furthermore, there was no core curriculum for schools, but 1400 registered syllabi. While there were strict subject requirements, there was no overarching uniformity. In addition, the Apartheid syllabi reinforced diversity of race, ethnic groups and languages. As a result of this, a common South African citizenship was not promoted (NEPI, 1993). The NEPI report (1993) made recommendations that addressed these issues. It was suggested that curriculum policies address the development of a standard curriculum that considered not only the formal curriculum, but also the curriculum applied by educators in classrooms; teachers’ knowledge and skills be developed by making the curriculum a part of teachers’ work and that the curriculum was implemented with sufficient resourcing and involvement of teachers and schools. It was further suggested that a curriculum be developed that addressed the concept of common citizenship by being sensitive to issues surrounding, race, gender and social class and, finally, that a national system of assessment and certification be developed to ensure standardization. The discussion of curriculum in a broader context will be discussed in the following section.

2.2.2 Background to the Implementation of OBE in South Africa

Along with the disintegration of Apartheid and the emergence of a democratic society in South Africa, came change in a variety of social contexts such as education (Lubisi and Murphy, 2002). As a result of an education system which was conceptualised and structured differently for different racial groups, schooling was stratified and used to marginalise non-whites (Young, 2000). Education for white people was used to develop knowledge and competence which would enable learners to compete for white collar jobs on a national and international level. Education for non-whites prepared them for subjugation and work as unskilled labour.

Pursuant to this, education for all ethnic groups was controlled by the Department of National Education and different ethnic groups were controlled by national departments of Education and the 10 Bantustans had their own Departments of Education. These departments had little say with regard to curriculum development and policy and were not allowed to remove or change anything in the curriculum. In effect, the body that controlled education was the Apartheid state (Jansen, 2001a). It is clear that this form of education bred inequality, and with the emergence of a democratic state, a new form of education that was free and fair for all would emerge.

One of the main features of education in South Africa, pre 1994 was the manner in which it was stratified, not only in terms of its delivery to different ethnic groups, but also its strict adherence to subject groupings and knowledge. Post 1994, the notion of life long learning became organized in terms of the National Qualifications Framework (NQF) and became the organising framework for the development of a new education system (Cossier, 2000). The shift in education was also as a response to globalisation and the need for education in South Africa to develop learners who were flexible, creative, critical-thinkers who could

continue to learn and apply knowledge, skills and values in a flexible manner. This need nationally and internationally was instrumental in developing an integrated curriculum that rejected divisions between knowledge, skills, theory and practice (DoE, 1995). It was within this paradigm that C2005 was developed and OBE became the teaching methodology in South Africa. The shift to OBE in South Africa was, however, dramatic. The *White paper on Education and Training* was published in 1995, the draft *Curriculum Framework* in 1996, the *Curriculum 2005 Documents* in 1997, and *Assessment Policy* in 1998. The Minister of Education launched *C2005* in March 1997 (Malcolm, 2000).

2.2.3 Principles Informing Curriculum post 1994

The principles informing curriculum post 1994 relate to the principles of OBE as they underpin both C2005 and the RNCS. Killen asserts that OBE can be viewed in three different ways: “As a theory of education, or as a systemic structure for education, or as a classroom practice, (2000: 2). Spady, (1994) defines OBE as an approach to planning, delivering and evaluating teaching, requiring educators and learners to focus on the desired levels of education. OBE, in the RNCS, considers the process of learning as important as content and emphasises the process and the content of education through outcomes, which should be achieved at the end of the process (DoE, 2002b). The RNCS further defines the structure and concepts used in learning area statements, the role of learning programmes and time allocations. It is clear that the OBE approach in South Africa is conversant with Killen’s view of OBE as a systemic structure. Furthermore, the requirements of the RNCS, as stipulated, relate to Spady’s view of OBE as mentioned above.

2.2.4 Implementation of C2005

The implementation of C2005 was a framework for school education to transform the way in which learners work and learning is assessed. The reasons for this change have been postulated as OBE providing a clean break from the Apartheid curriculum as well as the learner-centered approach giving a democratic emphasis to education for everyone to succeed (Young, 2000). The general focus shifted to CASS and away from a general body of content and towards a set of outcomes that could be demonstrated. This paradigm focused on real life context and application of knowledge, integrated with teaching across disciplines.

It has been argued that the change to C2005 was overly ambitious as subjects were replaced with eight learning areas. Within these areas both occupational and disciplinary knowledge were integrated (Young, 2000). Assessment was underpinned by criterion referencing and therefore had a more formative approach, focusing on feedback and learner progress. Content was considered a vehicle to understanding and important for translating content into meaning and meaningful action, as opposed to being an end in itself (Vandeyar & Killen, 2003). With no International precedent, South Africa was forging a new curriculum with no yard stick against which to measure itself or an example from which to learn.

The curriculum tools which were an aspect of C2005 made it an exceptionally complex system. It consisted of 66 specific outcomes, range statements, assessment criteria, performance indicators, phase organisers, and expected levels of performance (Malcolm, 2000). The complex nature of C2005 overwhelmed educators and the generic nature of the outcomes gave the curriculum too much breadth (Young, 2000). As a result of the complexities of C2005, educators felt disempowered and uncertain of their role in the curriculum. As indicated by Merriam, “No class teacher will want to experiment with a new way of doing things without some confidence in its potential success.” (1988:

198). For this reason, many educators only paid lip-service to the new curriculum. This was further exacerbated by the top-down approach of 2005 training programmes. The focus on definitions of phase organisers, outcomes and assessment criteria and the ‘design down’ process was too rigid and dogmatic. In so doing, concepts such as the nature of learning or the imaginative aspect of curriculum design were ignored. Furthermore, by ignoring the conditions in which educators work and ignoring the experience of teachers, teachers and schools were “trivialised in favour of the model of curriculum design in C2005” (Malcolm, 2000: 29).

While C2005 represented a significant paradigm shift, it did not depart from ideal OBE assessment nor did it represent a departure from high-quality assessment practices. Reliability, validity, fairness, discrimination and meaningfulness were still the underlying principles. The problem with the implementation of C2005 was that educators were ill equipped and prepared for implementation. The documentation issued to educators emphasised the paradigm shift and new terminology, but totally ignored issues such as reliability and validity. In addition the new procedures and new terminology drew teachers’ attention away from principles such as reliability (Vandeyar & Killen, 2003).

2.2.5 Policy Implementation in the late 1990s

Politicians and bureaucrats understood the need for a symbolic change in the production of education policy and legislation (Jansen, 1999). In the instance of OBE, it provided a debate about curriculum and pedagogy. However, when it was suggested that C2005 come under review, it raised questions regarding: what was wrong with the curriculum; whether or not the curriculum had failed; if there was to be change, what the scope would be? It also questioned what the implications were for educators, who were already overwhelmed with the change that had taken place with regard to education policy and curriculum.

Chapter Two

The review of C2005 had far reaching consequences as a result of the media misinterpreting the concept of a curriculum for the 21st century as displacing C2005. This, along with the examination of the complexity of OBE as experienced within the context of C2005 in terms of language and inaccessibility, came the sense that there was to be a fundamental shift away from OBE (Jansen, 1999). While the curriculum review was comprehensive, the scope of the proposed changes was vast. The changes were to have a dramatic effect on policy as they lead to a name change of the curriculum – Revised National Curriculum Statements – as well as streamlining the curriculum by moving away from programme based curricular. During this period, teacher unions raised concern about the limited voice of the educator and argued for their presence on the review teams (Jansen, 1999), this highlighted the question of Baxen and Soudien who so insightfully asked where the ownership of this curriculum lies (1999). As a result of these factors, Jansen argued that implementation of the new curriculum would not succeed as a result of the symbolic view of the curriculum as a legacy. This was exacerbated by the elaboration of education policies and laws, norms and standards, the point of which was to accelerate service delivery, particularly to the poorest citizens (Rensburg, 2001). As was indicated by Jansen (1999), OBE would fail as the policy driving educational change, was being driven in the first instance by political imperatives that had little to do with educators and the realities of classroom life.

A further consideration for the proposed changes to the curriculum centred on the nature of the debate surrounding curriculum change. Much of the discussion focussed on the strategy for curriculum change and the problems with implementation, as opposed to the theoretical foundations of the curriculum (Rensburg, 2001). Rensburg also notes that a change started taking place in the latter part of 1999, as discussions turned to streamlining the complex design features of the curriculum and reducing the jargon of the curriculum statements (2001). It seems that at this point, the reality of curriculum implementation started becoming a reality amongst policy makers and bureaucrats.

2.3 Processes in the Educational System

2.3.1 Assessment as a Process and a Practice

The shift towards an OBE driven curriculum has changed the landscape of assessment in South African schools. The initial change was experienced through the introduction of continuous assessment in schools in 1994 (Reddy, 2004). Furthermore, a shift in the assessment paradigm within the context of the social sciences away from prediction and control towards meaning and understanding has further influenced assessment. The way in which the teaching and learning process is understood through the lens of the curriculum, will influence the kinds of assessment practices adopted by educators. Assessment is the practice of and process by which educators and learners decide whether or not a learner is competent. According to Pahad (1997), a learner must show what he or she knows, understands and can do whatever is required to demonstrate competence. In the context of the NQF, these requirements are called Critical and Specific Outcomes. When educators assess, they should therefore be looking at a learner's progress in term of these National standards.

Assessment is a reality for every educator. Opinions vary as to the role of assessment in the educational process as some see it as determining learner achievement (Bray, 1986 as cited in Reddy, 2004) and others view it from a more general perspective. In Pahad's (1997) view, the assessment process can be divided into three steps: the learner being able to complete the task, evidence of the learner's performance is collected and evaluated against the standards and, lastly, the outcome of the evaluation is recorded. In the South African context, policy documents emphasise outcomes and standards. This emphasis requires educators to ask certain questions during the assessment process: What is the purpose of assessment? What assessment techniques should I use to gather

Chapter Two

information? How will I interpret the results? (Kotzé, 2004). The result of educators reformulating their approach to assessment is a change in assessment practice.

Experience has shown that if learning programmes and teaching methodology changes without changing assessment practices, the process becomes a waste (Pahad, 1997; Vandeyar & Killen, 2003). Therefore, the new focus for assessment is away from rote learning and is an attempt to develop higher order skills. Assessment must therefore be conversant with classroom practices and teaching methodologies (Kotzé, 1999). Assessment is now seen as a tool that can support the teaching and learning process as a means of lifelong learning as well as aiding learners to make important life and career choices. The process of assessment supporting the learning process is referred to as developmental and is as a result of the change to an outcomes-based educational philosophy.

Assessments should be designed with a specific purpose in mind, which will provide formative information to the relevant stakeholders. Guskey (2003) suggests that the use of formative assessment enables learners to use assessment information to demonstrate, on further occasions, success at achieving the required outcomes and educators to apply corrective facilitation. This is congruent with Airasion's (2001) view that the purpose of assessment is to obtain information to make sound decisions.

Education can be regarded as a tool to empower people through integrating skills, values and knowledge. Learners, therefore, need to be able to think critically, creatively and be responsible about the application of their knowledge. Critical Outcomes strive to create a balance between emphasis placed on practical skills, knowledge and social responsibility. Pahad (1997) Department of Education Policy Documents as well as Vandeyar and Killen (2003) discuss integrative assessment tasks and suggest that they be used for the culmination of a section of work in order to integrate a number of outcomes learners have

been working on over a period of time. Tasks such as these can be seen as both learning and assessment as educators and learners discuss the tasks on an ongoing basis. This approach to the practice of assessment speaks to the formative nature of OBE.

2.3.2 Assessment Prior to OBE

Assessment, prior to OBE, was largely an accumulation of isolated facts and skills, which were recorded and, by and large, used for summative purposes as they were based on inference and professional judgment (Malcolm, 2000). For the most part, instead of forming part of the teaching and learning process assessment was judgmental, summative and an isolated aspect of the curriculum used to determine how much learners knew (Reddy, 2004). As a result of this, assessment was divorced from instruction. Assessment was seldom transparent and learners were infrequently aware of the criteria against which they were assessed. For this reason, assessment did not focus on the growth of the learner, but rather on what the educator felt they had taught well. Malcolm (1999) suggests that tests were a once-off opportunity for learners to indicate what they knew and, despite the reliability of the test in terms of results, marks remained unquestioned.

Critical thinking and personal input were not factors; instead the majority of assessment focused on fact recall as a result of assessment being mainly summative, norm-referenced and judgmental. There was little emphasis placed on authentic assessment and assessment was dictated by bureaucratic structures that stipulated when and how assessment would take place. Norm referencing led to the misnomer of learning having taken place in comparison to a class average as opposed to learning in a developmental sense. Promotion and retention were also elements that were based on summative assessment and seemingly gave little thought to the reliability or fairness of the exam (Vandeyar & Killen, 2003).

Chapter Two

Reliability was generally not a consideration as assessment was usually once-off and fairness and validity generally spoke to content and representativeness. Pahad (1997) also contends that assessment tasks, in the context of South Africa's past, were used as barriers used to keep people back. In other words, assessment was for selection and could be referred to as judgmental. "The shortcomings of the assessment practices in pre-OBE schools should have been addressed directly in the curriculum reforms driven by OBE, but this does not appear to have happened." (Vandeyar & Killen, 2003: 123).

2.3.3 Assessment: C2005 to the Revised National Curriculum Statements

The RNCS is a streamlining of the design features and simplification of the language of C2005. It affirmed the commitment to OBE while reducing the curriculum design. The RNCS introduced certain changes to proposed assessment practices at schools. The most important shift in assessment was from criterion-referenced assessment in C2005 to standard-referenced assessment in the RNCS. One of the concerns relating to C2005 was that the assessment tools were not manageable as a result of the 66 outcomes, 200 assessment criteria and the number of learners in a class (Malcolm, 2000). These have subsequently been refined in the RNCS. In each Learning Area and in each phase, there is a set of outcomes that define what learners are expected to achieve; for each grade of learning there is a set of assessment standards that define the levels of knowledge, skills, attitudes and values learners are required to demonstrate as evidence that they have achieved each phase outcome to an appropriate depth and breadth (Vandeyar & Killen, 2003).

This means that outcomes remain the same from grade to grade while the assessment standards change. As the standards are grade specific they

describe how conceptual understanding is meant to progress in each Learning Area. Teachers are now able to think of outcomes on a continuum rather than as a dichotomy. This results in teachers having to question to what level learners have achieved an outcome instead of putting them in an achievement category for each outcome (Kotzé, 2004). There is still an element of reporting on each outcome according to a four-point scale for reporting practices. The fact that reporting is still normative and comments on learners' achievements in relation to other learners, reinforces the reluctance to move completely towards standard assessment.

By refining the emphasis of assessment in the RNCS towards assessment as a means of helping learners learn, a clear departure from pre-OBE assessment practices is revealed. This formative approach means that assessment is now integrated into teaching and learning. The main purpose of assessing learners is to enhance individual growth and development, to monitor the progress of learners and to facilitate their learning (DoE, 2002). This has largely been achieved as a result of the assessment approaches and strategies associated with an OBE approach to teaching, learning and assessment.

The assessment guidelines link assessment practices to the principles of OBE. The principles are not made explicit in the RNCS however one would assume that they are the principles advocated by Spady. Clarity of focus is justified because assessment is clearly linked to outcomes and the assessment standards clarify what is expected in the demonstration of each outcome, the methods chosen for assessment activities must be appropriate to the assessment standards to be assessed and the purpose of the assessment must be understood by all the learners and teachers involved, (DoE, 2000a). Vandeyar and Killen (2003) discuss how the RNCS are explicit about expanded opportunities, but less explicit about design down and high expectations. The difference between C2005 and the RNCS is that there is now a stronger emphasis placed on administration, where certain minimum requirements are

Chapter Two

stipulated for schools, but there are still no guidelines to enhance validity and reliability.

2.3.4 The Relationship between Curriculum and Knowledge

The debate surrounding knowledge within the context of the curriculum begins with the shifting away from knowledge as competence to a broader concept of knowledge as outcomes (Young, 2000). As a result of OBE focusing on what learners know and can do, curriculum developers begin with the intended results of learning in terms of knowledge, skills and values rather than prescribing the content (Lubisi et.al, 2002). Further observations made by Lubisi et al. (2002) synthesise the observation that curriculum in the past was content driven and that the core syllabus was defined by knowledge and content to be learnt. While aims were set out, little attention was given to concepts and skills. With the implementation of C2005, the focus shifted away from the concept of curriculum and rested with concepts such as outcomes. C2005 raised questions about the place of content knowledge in the curriculum: issues in the selection of content and the criteria for choosing content (Malcolm, 2000). In the context of South Africa there were a number of barriers to this. Traditionally, knowledge had been defined within the curriculum as “a given body of knowledge to which learners, teachers and the community have to adapt” (Young, 2000: 28). Furthermore, knowledge has been considered as that which is socially constructed. Within the context of South Africa, knowledge was either considered as that which had been constructed within a curriculum as a result of political struggle or knowledge from the past. This was the initial concern with C2005 which lead to a curriculum that was vague. However, as suggested by Young (2000) the RNCS has attempted to consider aspects from the previous curriculum, such as conceptual learning along with the Social Constructivist approach that states that the curriculum functions in the cognitive domain and is not just a political imperative driving change.

It is, however, important to note that the framework, in which the outcomes and assessment standard operate, remains a curriculum. Gultig, Hoadly and Jansen assert that while implementers do not call it a curriculum, it is a “social construction that carries with it sets of political, social and educational values and assumptions. These values and assumptions have profound implications for what is taught, how it is taught and the impact this teaching has on different groups.” (2002: ix). The relationship between the curriculum and knowledge is therefore dependent on how the concepts of teaching and learning are constructed within the curriculum framework, as this determines how knowledge is perceived.

2.3.5 The Relationship between Curriculum and Assessment

Siebörger (1998: 1 as cited in Reddy 2004), asserts that changes to assessment have always been recognized as an important means of achieving curriculum change, but have rarely been integrated into the process. Furthermore, Reddy and Le Grange (1996) suggest that assessment reform can never take place independently of curriculum, or a set of conditions that promote change. Change only in assessment changes very little. There is an important link, therefore, between the curriculum framework, which is derived from policy as it guides educators in terms of how they plan their classroom activities and assessment strategies. According to Taylor (1999), the curriculum framework, “informs those who construct assessment instruments for measuring what has been learnt at classroom, district, provincial or national level.” In terms of C2005 and, more recently the RNCS, what is learnt at classroom level is determined by the Critical and Learning outcomes. As a result, the goals and objectives of education cannot be evaluated without assessment (Kotzé, 1999). For this reason, it can be said that assessment is an integral part of the educational process.

Assessment, therefore, is also a part of the learning process and fulfils an integral function in the educational process. Given that in the context of South

Chapter Two

Africa, one of the goals of education is to meet the outcomes, and it is only through assessment that measurement of these goals can take place, we can assert that curriculum and assessment are inextricably linked. Assessment is linked to learning and teaching, while performing the function of developing and monitoring. It is therefore through assessment that the efficacy of the process of teaching and learning can be evaluated (Lubisi, Wedekind, Parker, Gultig, 1997). Assessment therefore needs to be developed with a clear sense of curricular purpose and clear levels of analysis, which include for whom or for what assessment is playing out its role (Reddy, 2004). This point is highlighted in a discussion of OBE by Lubisi et.al. (1997), in which they assert that feedback from assessment informs teaching and learning; allowing for the critique of outcomes, methodology and materials. The standards set by assessment practices will therefore have a profound effect on the process of teaching and learning as assessment guides these activities. For this reason, it is imperative that assessment that is proposed within a curriculum framework must support the approach to teaching and learning contained therein.

2.3.6 The Role of Outcomes

The new education policy is aligned to the NQF and the entire education system is based on outcomes that underpin the constitution and have been adopted by the South African Qualification Authority (SAQA) (Cossier, 2000). It is envisaged that the outcomes, as defined by the National Department of Education, will facilitate the acquisition of knowledge, skills, values and attitudes through a learner-centered and activity-based approach to education (Du Toit & Du Toitt, 2004). The role of outcomes in OBE is to focus the attention of educators and learners on the desired levels of education. There are different types of outcomes that can be defined in either an international or a South African context. In the context of South Africa, the National Department of Education defined outcomes in C2005 as critical and specific outcomes, while in the RNCS they are referred to as critical and learning outcomes. One of the initial problems

associated with outcomes and C2005, was the varied language surrounding outcomes. Furthermore there appeared to be a difference between how outcomes were defined in policy and the practical application thereof in classrooms (Bellis, 1999).

Outcomes are a means of telling learners what they have to understand and have to be able to achieve. As defined by Spady (1994:1), “Outcomes are high quality, culminating demonstrations of significant learning in context”. In the context of South Africa, these outcomes are intended to monitor learners’ progress. Fundamentally, what this means is that assessment is outcomes-based and assists with finding out what learners can do and what the next educational step is. The critical cross-field outcomes are generic and underpin the learning process, while also contributing to the holistic development of the learner. Critical outcomes also involve the way learners approach tasks and focus on their ability to solve problems, make decisions, plan, organise and communicate effectively (Pahad, 1997). Specific outcomes are context specific and describe the competence required of learners to demonstrate at certain levels. It is the Specific outcomes which form the basis of assessing the progress of learners (Lubisi et. Al, 1997). The learning outcomes articulated in the RNCS are streamlined from the specific outcomes. This system of assessment leads towards lifelong learning and provides learners with multiple opportunities of demonstrating what learners know and can do.

2.3.7 The Relationship between Outcomes and Assessment

The critical issue of outcomes-based learning is that the outcomes are attained to a certain level. Furthermore, these outcomes should be made explicit in order for learners to know what they are working towards (Kotzé, 2004). As defined by Lubisi et al. (1997), one of the key roles of assessment is to determine whether or not the set outcomes have been attained. Learners are no longer measured against the performance of each other, instead, measurement is against the

Chapter Two

attainment of outcomes and the level at which they have been attained. This reinforces the emphasis that assessment is criterion referenced rather than norm referenced (Lubisi et al., 1997 & Spady, 1994). Assessment therefore becomes a tool with which to monitor learners' progress in a transparent, more accountable manner. In so doing, assessment becomes an integral aspect of the teaching and learning process.

2.3.8 Why Quality Assurance has been developed

Smith and Ngoma-Maema (2003), discuss the development of a comprehensive system of quality assurance that involves much more than keeping track of exam results. They explain that quality assurance in schools is a reaction to globalisation (Jansen, 2001) and has an underlying economic rationale as well as emphasis on standards, performance and accountability. Their concerns relate to new knowledge being taken on board at a macro systems level, but that it may not successfully be transferred to the micro level, such as schools. This is where knowledge must be internalised if educational change will take place.

Pahad (1997) alludes to quality assurance while discussing examinations, when stating that, "Exams or tests help to confirm the teacher's evaluation. They also ensure consistency between teachers, schools, districts and provinces in the interpretation of national standards. Exams also help education departments to diagnose problem areas and ensure quality." Pahad goes on to suggest that, as a result of Apartheid and the disadvantages experienced by a number of schools, learners and teachers, structures need to be put in place to ensure standards and fair administration. Provincial Education Departments and Education and Training Quality Assurance bodies (ETQAs) will be responsible for monitoring continuous assessment and record-keeping procedures. Pahad (2003) observes that, there is a global realization that one of the most effective ways to raise educational standards is through the introduction and development of more skilful assessment practices. It becomes clear that the best guarantee of fairness,

when assessing, is a more comprehensive approach to quality assurance. In this regard, the ETQAs will play a large role in determining standards. One of the techniques that will be used to ensure standards, will be moderation.

2.4 Conclusion

The main focus for this study was to explore the impact that the policy of teaching towards outcomes has had on the assessment practices of an educator. In so doing, it was also hoped that the tensions between policy and practice might be elucidated. The literature review, therefore, had to consider the context in which curriculum policy change had occurred in South Africa in order to facilitate an understanding of the respondent's experiences as they are articulated in the study. Primary sources in the domain of policy were consulted to present the discussion surrounding curriculum policy change and the subsequent repercussions. This aspect of the literature review tied into the conceptual framework of the study, as presented in section 1.6, in relation to policy being an input into the educational system.

Thereafter, literature was reviewed, in relation to aspects of the educational system, as defined in the conceptual framework as part of the education process. Assessment was considered from different vantage points in order to trace the changes that have taken place in assessment with regards to pre OBE, C2005 as well as the RNCS. The relationships between curriculum, knowledge and assessment were then investigated in order to establish the relationships between the aspects of the education system that make up the education process. These relationships were explored in order to clarify the variables that would possibly impact on the understanding, perception and experience of the respondent in relation to curriculum policy change. The relationship between outcomes and assessment was examined from the perspective of theory to form a comparison that would be drawn from the respondent's experience. Finally,

Chapter Two

the chapter addressed quality assurance as an agent of change in relation to policy.

CHAPTER THREE

3 Research Design and Methods Applied During the Study

3.1 Introduction

This chapter clarifies the research design and methods that guided and informed the study. The research design for this study is known as an instrumental case study that focuses on one respondent and is explained and substantiated in section 3.3. Section 3.2 clarifies the paradigm that underpins the dimensions of the investigation as interpretive while considering the role constructivism and behaviourism have to play in the study. The qualitative research methodology is elaborated on in section 3.4. Site selection and sampling are introduced in section 3.5 and the data collection and procedures are mentioned in section 3.6. Section 3.7 details the instruments used to gather the data for the study. A brief overview of the data analysis is given in section 3.8, which is followed by a discussion of validity and reliability issues in section 3.9. The ethical considerations of the study are discussed in section 3.10 followed by the conclusion.

As mentioned in Chapter One, the research conducted for this study was that of an instrumental case study designed to investigate a single educator teaching Language, Literacy and Communications to a Grade 9 class at an independent school. The purpose of the investigation, elucidated in the research question as the tension between the policy of teaching towards outcomes and the effects it has on assessment practices, resulted in the design and implementation of a series of interviews, questionnaires and classroom observation schedules.

Research Design and Methods Applied During the Study

These were implemented with the educator and followed up with a series of interviews with learners in her class. The questionnaires, interviews and observation schedules were used to inform the research question as presented in Chapter One. Literature, relating to concepts of policy and practice (section 2.2) and curriculum and assessment (section 2.3.5), was studied in order to establish a rationale for conducting this study. Thereafter, literature pertaining to educational theory, in particular OBE, was reviewed in order to define the research design and methods.

3.2 Research Paradigm

As educational research is a social science, the research design for this study had to be allied to concepts of social reality. The single-respondent instrumental case study as outlined in the previous section, substantiates why it was selected as the research design to guide this study operating within the social sciences. This research stresses the social reality that is the experience of individuals in the creation of the social world. In this instance, the individual is seen to, “create, modify and interpret the world in which he or she finds himself or herself.” Cohen et al. (2000: 7). The use of a single respondent, locates this study within the interpretive paradigm. As indicated by Cohen et al. (2000), the interpretive paradigm is characterized by a concern for the individual and the need to understand the “subjective world of human experience” (Cohen et al., 2000: 22).

3.2.1 The Interpretive Paradigm

Interpretivism is an attempt by researchers to begin with an individual in order to understand their interpretation of the world (Cohen et al., 2000). As suggested by Glaser and Strauss, (1967) theory should not precede research, but follow it. In this manner, theory emerges and arises from particular situations, while being grounded on the data generated from research. The integrity of the research

comes from trying to understand the perspective of the individual and their resultant actions. According to Cohen et al. (2000: 23), a person's actions may therefore be thought of as "behaviour-with-meaning", which is essentially intentional behaviour. Therefore, in the interpretive paradigm, meaning, understanding and interpretation are focal points of the research. As a result of the above mentioned criteria, the interpretive paradigm seeks to produce a rich and descriptive analysis that elucidates an understanding of the social phenomenon.

3.2.2 Application of the Research Paradigm to the study

Sections 3.2 and 3.3 clarify the research paradigm and design respectively as focusing on the singular in order to investigate the understanding the individual has of their context and ultimately their resultant behaviours. As a result of this design and paradigm, the research would be regarded as non-interventionist as it does not impose an external form; instead it seeks to understand the case from within. Furthermore, the study will not begin with a hypothesis. Instead, the theory will emerge from situations created by the study. The following observation by Beck (1979: 53) captures the sentiment of the paradigm in which the interpretive researcher functions:

[T]he purpose of social science is to understand social reality as different people see it and to demonstrate how their views shape the action which they take within that reality.

The value for the interpretive researcher lies in the ability to conduct an in-depth analysis and portrayal of an individual's unique experiences. It is therefore, the purpose of the study, as a means to better understanding a phenomenon or action, that motivates the interpretive researcher.

Research Design and Methods Applied During the Study

As mentioned in Chapter One, this study arose out of my experience of educators' low morale, frustration and loss of confidence in themselves and their teaching abilities when implementing the new curriculum. Educators made sweeping statements about their frustrations with, and lack of confidence in OBE and the associated methods of assessment. A solution to understanding the actual and specific causes of frustration was to attempt an understanding of an individual's experiences from within. In order to achieve this, the study had to take cognisance of the context in which the educator was operating and seek to understand the individual's perceptions and understanding of the new curriculum policy, OBE and teaching towards outcomes in the form of a case study. In terms of interpretive research, it would then become possible to understand the educator's actions in relation to her assessment practices. It is from this interaction that theory would emerge. As a result of the study attempting to interpret and come to an understanding of the individual's perspectives through the participant's eyes, the study falls into the interpretive paradigm.

Furthermore, the view of social science adopted for this research constructs and interprets reality in a manner that stresses the importance of the subjective experience of the individual. The ontological, epistemological and methodological assumptions expand this view. The ontological assumptions of this research define reality as the result of individual cognition created in the mind of the individual, while the epistemological assumptions consider knowledge as personal, objective and unique. As a result of the principle concern of the study being the "understanding of the way in which the individual creates, modifies and interprets the world in which he or she finds himself or herself" (Cohen et al., 2000: 7), the research takes on a qualitative aspect.

3.2.3 The Link between Constructivism and the RNCS Application and Implementation

The Constructivist theory, which underpins the South African curriculum, recognises that teachers are facilitators of the learning environment and that learners are, “free thinking problem solvers who construct their own learning pathways.” (Moll, 2002: 17). It also recognises that learning takes place when learners “co-construct” in activities with their peers. This is congruent with the Constructivist paradigm in which Vygotsky and Piaget reinforce the teacher as providing an organisational framework of knowledge in which learners operate. Moll indicates that knowledge is, “a constructive interaction between what is ‘inside’ the learner and what is ‘outside’” (Moll, 2002: 18). A further reason for why Constructivism as a theory relates directly to the South African experience is the social construction of knowledge through authentic learning in meaningful contexts. Furthermore, the acquisition of knowledge is active, learning styles are diverse and curricula are built on Constructivist theory resulting in a higher degree of critical thinking.

Another consideration of the research is that of change. The literature review clarifies why the Department of Education changed the curriculum and opted for an OBE approach (see section 2.2.2). One of the points made by Moll (2002) was that when knowledge is constructed, there is an interaction between individuals and their social-cultural environments. One of the main thrusts for using an OBE methodology was to revise the manner in which individuals interact and construct knowledge in their socio-cultural environment - an environment that had shifted radically in post apartheid years. Terwel (1999) clarifies this position when observing that due to design experiments, undertaken by researchers such as Brown, Campione and Bereiter, regarding the education of children, the underpinnings of curriculum can largely be attributed to Constructivist ideas. Therefore, Constructivism is seen as, “a key to reforming contemporary education.” (Terwel, 1999: 197). We can sum up by saying that

Research Design and Methods Applied During the Study

Constructivism is about how children learn and is based on the premise that knowledge develops according to development that is social, natural, and based on activities that are cultural and individual.

A last point related to constructivism as a paradigm underpinning the dimensions of teaching and learning is the issue of curriculum reform. Constructivism is regarded as a paradigm in which curriculum reform can and has taken place in the context of the curriculum in South Africa. An aspect of consideration of the study will relate to the way in which educators view the curriculum reform, as this will determine their views on OBE and the subsequent assessment practices used.

3.2.4 The Link between Behaviourism and OBE

While Constructivism underpins the framework of the new curriculum in South Africa and the curriculum and the methodology behind it determines teaching, learning and assessment practices, one cannot ignore the behaviourist elements of Spady's work. Spady presents learning as coming from outside with the outcome being behaviour, a demonstration of performance. The way in which Spady conceives of learning and outcomes as behaviour will influence the study in the same way that the way in which educators perceive outcomes, will affect the assessment practices they apply to them. This is contrasted with a Constructivist view of OBE in which learning takes place in the mind because of personal, social and cultural factors (Malcolm, 1999: 91).

Spady's behaviourism regards outcomes as demonstrations of performance, not mental processes or thought. While these concepts are implicit in policy, the manner in which educators perceive and interpret these concepts will determine the manner in which they assess them. A case study provides the opportunity to observe and question an educator in order to arrive at an understanding of what their perceptions are, explore why their perceptions have developed in a

particular manner and is, therefore, a means to understanding their assessment pedagogy. Vandeyar and Killen (2003) observe that it is only if the principles of assessment are understood that they can provide a framework in which educators can operate. However, if they are ignored or misunderstood, assessment practices will not yield useful data.

3.2.5 Rationale for the Interpretive Paradigm in a Constructivist-Behaviourist context

The dichotomy of thought, presented in the view of OBE, reinforces the point made by Terwel (1999: 197) that, “no single theory can provide an adequate foundation for the design of curricula. Educators need multiple perspectives, multiple research findings and, especially, practical experience and extensive deliberations to change classes into communities of inquiry.” For the purposes of this research, therefore, research will be located in the Interpretive paradigm while taking cognisance of the role Constructivism and Behaviourism play in underpinning the teaching and learning dimension of the investigation. Not only do researchers require multiple perspectives, but in the Interpretive paradigm, they also need to recognise that observation is fallible, has error and that all theory can be revised (Henning, Van Rensburg & Smit, 2004).

This study has identified that it will take into account the role Constructivism and Behaviourism play in the study as indicated above. However, it is also necessary to determine the paradigm in which the educator used for the case study operates. As indicated by Du Toit and Du Toit (2004: 4) “The position in which the educators find themselves on the continuum will definitely influence the way in which they teach, assess and structure a teaching-learning environment.” As will their perception of what “learning” is. Du Toit and Du Toit summarise learning as, “a constructive, cumulative, self regulated, goal directed, situated, collaborative, and individually different process of meaning construction and

Research Design and Methods Applied During the Study

knowledge building.” (2004, p. 8). Interpretive research is, therefore, not only concerned with the way in which people make meaning, but also with what meaning it is that they make. As indicated by Henning, Van Rensburg & Smit (2004), the researcher must therefore look for the frames that shape meaning and, for this reason, must be sensitive to the role of context. This will determine the types of methods used for gathering data.

3.3 Research Design

The study was implemented with a single educator at an Independent secondary school. The aim of the study was to explore the tensions that exist between policy and practice due to the implementation of the RNCS. This was achieved by exploring the experience, understanding and perception of an educator by considering how the policy of teaching towards outcomes had impacted on her teaching methodology and her assessment practices. The case is regarded as a “bounded system” (Creswell, 1998), the boundaries having been defined as the individual teacher as the case, while the boundaries are the place: an Independent secondary school and the time period: two years. In the context of this research, the case study will be regarded as the “object of study” (Stake, 1995) around which the study is structured – the case (Merriam, 1998).

The case study was selected as it assumes that social reality is constructed through social interaction, and seeks to identify and describe this “social reality” before analysing or theorising (Stark & Torrance, 2005). Furthermore, the single case study was selected as the research design for this study primarily because the topic is emotive and difficult to quantify (Stake, 1994), as the individual brings their own interpretation and perspective of knowledge, teaching, learning, OBE and assessment to the study. Furthermore, the intention of the research is to study the case deeply for the purpose of understanding, rather than “generalizability” (Creswell, 1998) to other cases. Ultimately, the case study

seeks to ‘illuminate’ the readers’ understanding (Parlett & Hamilton, 1972) of the effect the policy of teaching towards outcomes has had on assessment practices.

The case study can determine whether or not educators make use of outcomes and assess according to these by looking at their records and observing their lessons, while interviews and questionnaires with both the educator and learners will establish the extent to which implementation has taken place, the effects of implementation on assessment practices and how effective the implementation has been. It provides not only what according to Stake (1994), is an instrumental case study hoping to gain insight into an educational issue, but it also provided an ability to record feelings, perceptions, experience and opinions. This will be achieved by drawing on the nature of the case, the case’s historical background, the physical setting, the political and social context and the informants through whom the case can be known (Stake, 2000).

While qualitative research can mean different things in different contexts the definition by Denzin and Lincoln (2000: 3) that “places the observer in the word [and] ... involves an interpretive, naturalistic approach to the world”, is particularly apt as the intention of this study is to interpret the understanding, perception and experience of the educator in secondary education as a result of a policy change in terms of curriculum. As Denzin and Lincoln further elaborate, “the qualitative researcher stud[ies] things in their natural settings, attempts to make sense of, or to interpret, phenomena in terms of the meanings people bring to them.” (2000: 3).

The following sections will take a more detailed look at the selection of the case study as the research design as well as the type of case study selected for this study.

3.3.1 Case Study

Education research is a social science, and within that research paradigm, the concept of social reality is that of the experience of individuals and the way in which they create and modify the world. In keeping with this theory, the research design employed for this study will be that of the case study. Case studies, as indicated by Cohen et al. (2000), focus on the individual and seek to understand their perceptions. They therefore see the situation through the eyes of the participant, recognising that the individual has their own unique experience of the world around them and therefore a different interpretation. This is further developed by Punch (2005) who suggests that case studies aim to understand the case in depth as well as in their natural context. He further suggests that by preserving the case through a holistic focus and an understanding of the wholeness of the case, further understanding is to be gained. This is referred to by Flyvbjerg (2004: 421) as "context dependant knowledge", which is reinforced by Merriam (1988), who sees the case study as a tool for gaining insight and understanding into the perspectives of those being studied and in so doing contribute to the knowledge base and practice of education.

The Constructivist approach, adopted in C2005 and the RNCS, recognises the role of the educator as providing a framework in which learners acquire knowledge in a learner centred, active learning manner. While this is the case according to policy, what the case study hopes to achieve is an understanding of how the individual educator interprets and perceives this policy and the manner in which they implement it in terms of their assessment practices. The most appropriate research design for this research was therefore the case study, but more specifically, the single-respondent case study. An argument for making use of a single-respondent case study as discussed by Sharpley (2000) is that subtleties of the data will not be omitted as a result of generalization, as is often the case when averaging the results in a group study. Allied to this is the rationale that the case represents a unique case (Yin, 1994) of an educator

interacting with policy and her resultant implementation in terms of assessment practices within the context of an Independent school. A further consideration of this case study is that it hopes to gain insight into an educational issue and would be categorized, according to Stake (1994), as an instrumental case study.

As has been suggested in the previous paragraph, the research undertaken will therefore be descriptive in nature, attempting to describe and explain the case study as opposed to predict or hypothesise. As McMillan and Schumaker (1984: 26) in Merriam (1988) point out, “The purpose of most descriptive research is limited to characterizing something as it is, though some descriptive suggests tentative causal relationships.” In the instance of this case study, the educator’s understanding, experience and implementation of OBE will be described and in so doing, possible causal relationships will be suggested between this understanding and the effects on her assessment methodology.

To consolidate the classification of this research as a case study, I will draw on the definition of a case study according to its special features as defined by Merriam (1988: 11). The four characteristics she cites as “essential properties of a qualitative case study”, as derived from a number of different sources (Guba & Lincoln, 1981; Helmstadter, 1970; Hoaglin & Others, 1982; Stake, 1981; Wilson 1979), are: particularistic, descriptive, heuristic and inductive. Each characteristic will be discussed separately in order to establish its relevance to this study and further substantiate the research design as that of the case study.

The **particularistic** characteristic identifies the focus of the case study as a particular situation, event, programme or phenomenon. In the instance of this study, the case is a single educator implementing OBE (particular situation) while the study seeks to understand the implications on assessment (programme). A bounded system, as identified by Smith (1978 as cited in Merriam, 1988), can be identified for the purposes of this case study. In so doing, the research is an attempt to indicate the impact of curriculum reform on assessment in this

Research Design and Methods Applied During the Study

particular instance and to reveal what these changes might represent for educators exposed to such change. As a result of the focus being so specific, the research design allows for the investigation of everyday practice and, in so doing, is able to take a holistic view of the situation.

The data yielded from this study focuses on the educator's interpretation and understanding of OBE and the development of her assessment practices. This makes the educator the focus of the final analysis and it is from this analysis that a better understanding of policy, implementation and practice can be derived. While the study has therefore investigated the specific instance and context of one educator, it can illuminate a general problem of curriculum reform in South Africa (Olson, 1982 as cited in Merriam, 1988).

The **descriptive** characteristic, according to Merriam (1988), is one that yields a report rich in description of the phenomenon under study and according to Guba and Lincoln (1981) cited in Merriam (1988), the interpretation of descriptive data according to, among others, attitudes and notions in order to interpret meaning. This is pertinent in this case as the description will analyse and describe the attitudes and ideas of the respondent towards OBE in an attempt to identify the impact on her assessment practices. The description provided in this report begins in section 3.5 in which the foundations are laid by describing the context in terms of site and sample, while in Chapters 4 and 5 the data are presented and discussed. The discussion takes the form suggested by Wilson (1979 as cited in Merriam, 1988) of presenting the findings in prose in order to present images according to the documentation of events, quotes and artefacts.

The **heuristic** characteristic, as defined by Merriam (1988), means that this study should illuminate the reader's understanding of the respondent and her response to the implementation of curriculum reform and her subsequent assessment practices. The heuristic characteristic should validate why things are the way they are and possibly result in a rethinking, in this instance, of how curriculum

reform in terms of policy and practice should be implemented. This is discussed and elaborated on in Chapters 4 and 5 where the data are analysed and presented.

The final characteristic of the case study as defined by Merriam (1988) suggests that case studies are **inductive** by nature as generalizations, concepts or hypotheses emerge from the analysis of data that are grounded in the context being examined. In the instance of this research, there was no working hypothesis; instead it was the intention of the research to discover relationships between the policy of implementing OBE and teaching towards outcomes, and the effects this had on the respondent's assessment practices within the context that they function. Understanding, hypotheses and concepts will be drawn out of the data during analysis. For this to be achieved, the research investigated how the educator constructs and perceives knowledge; her understanding of OBE and the manner in which she implemented the new curriculum. The focus of the research then shifted to the educator's assessment practices by focusing on an understanding of how she conceptualises assessment, views the function of assessment in the classroom and lastly her implementation of assessment.

3.3.2 The instrumental Case Study

The case is a bounded unit that functions specifically and while it is an integrated system, the case is bounded according to its specific nature and the features within its boundaries as defined by Stake (2000). In relation to the study of the impact of the policy of teaching towards outcomes and the practice of assessment, Stake's definition becomes more relevant as he goes on to elaborate on the coherence and sequences of the case which make it possible to recognise features external (curriculum policy) and internal (practice of assessment) to the boundaries of the case.

Research Design and Methods Applied During the Study

The purpose of this study is to explore the particular case in question in order to provide insight into the issue of policy versus practice in the light of teaching towards outcomes and the subsequent assessment thereof. In so doing, generalizations will be made with regard to policy implementation and the resultant practices in relation to OBE and assessment. The case itself is therefore of secondary interest as it will yield data in order to make these generalizations. The research design aligns with Stake's definition of an instrumental case study (2000: 437), "The case is of secondary interest, it plays a supporting role, and it facilitates our understanding of something else." A further view of the instrumental case study, being described as giving insight into an issue, is given by Punch (2005). An additional point, made by Stake (2000), is that the case study represents an understanding of what is important about the case in its own world. This is particularly relevant to the limitations of the study as defined in Chapter One with regards to the single-respondent case study being carried out in an Independent school.

3.4 Research Methodology - A Qualitative Approach

A distinct relationship exists between research design and measurement. In the instance of this research, the design is naturalistic and interpretive while the methodology is qualitative. This approach has been selected as the intention – as previously mentioned – is for the study to understand and describe a particular case. The intention of the data, therefore, is to, "take us, as readers, into the time and place of the observation so that we know what it was like to have been there. They capture and communicate someone else's experience of the world in his or her own words" (Patton, 2002: 47). As a result of this research being a case study, the methodology was concerned with how the respondent constructs her reality in terms of policy and practice and how the situational constraints of an Independent school shape how the respondent's experience is created and given meaning (Denizen & Lincoln, 2000).

Case studies are not only defined by their boundaries as defined in the research question, they are also defined by their methodology (Travers, 2001). The intention of this case study is to interpret and describe the educator's understanding of educational policy, and explain how her interpretation and implementation thereof affected her assessment methodology thus highlighting the need for in-depth understanding within the context of the individual (Patton, 2002). This relates back to the interpretive epistemology of this study, in that what the researcher is ultimately attempting to interpret is how the educator constructed her understanding of educational policy and the effects that this had on the behaviour that emanated from this understanding. The research methodology applied to this research is qualitative as it seeks to understand (Stake, 1995), interpret and make meaning (Merriam, 1998) as opposed to hypothesise.

The description of this study takes into account a biased world that is subjective, and in this instance should be interpreted and described rather than measured. The case study is a means to, experience a situation from the perspective of the participant, understand the policies and practices that govern their behaviour and interpret them as opposed to testing a hypothesis. As a result of this case study exploring and investigating a person's perceptions and interactions it can, according to Merriam (1988), be described as "naturalistic".

Merriam (1988: 19) describes the researcher as "instrument responsive to the context" because of the researcher mediating between the meaning that is a part of people's experiences and the investigator's own perception. In a sense, the researcher becomes the "primary instrument" for data collection and therefore functions within the phenomenon of the case study. From this statement, it becomes apparent that the context of the study is inextricably linked to the case and the case therefore can only be interpreted in terms of the context. The purpose of the case is therefore to discuss the interaction of characters that govern the phenomenon and seeks to be what Merriam (1988: 10) refers to as a

Research Design and Methods Applied During the Study

“holistic description and explanation”. As consolidated by Yin (1984), case study methodology is suited to situations in which the phenomenon’s variables are impossible to separate from their context.

Drawing on the above mentioned views in relation to qualitative methodology, as well as assertions made about the interpretive paradigm in section 3.2.1; multiple methods of data collection have been selected that are conversant with a humanistic and interactive approach to qualitative research (Creswell, 2003). The methods of data collection used are: open-ended interviews, observations and documents. To shed further light on the process of data collection, site, sampling, data collection and analysis, in terms of validity and reliability, will be discussed in the remainder of the chapter.

3.5 Site Selection and Sampling

3.5.1 The Site

3.5.1.1 Administrative Requirements of Government versus Independent Schools

Schools can be loosely divided into two categories in South Africa – Government and Independent schools. While both have to be registered with the Department of Education as service providers, there are different regulations that govern them. Government schools are accountable to their District Offices, which, in turn, are answerable to their Provincial Departments and ultimately to the Department of Education. Independent schools that are not subsidised by the state do not have to answer to district or provincial departments. They must instead be registered with an independent educational organisation such as The Independent Schools Association (ISASA), as in the case of the school at which the case study was carried out. Furthermore, they can choose to write either

Government Grade 12 examinations or the Independent Education Board (IEB) examinations.

The case study was located in an Independent school, which is registered with ISASA and writes the IEB examinations, as a result of my interest in the application of policy. As Government schools are accountable to district and provincial departments, educators are required to complete and submit far more documentation than educators at Independent schools. At a Government school for example, educators are required to submit micro and macro plans of lesson plans to their district offices containing their adherence to teaching towards critical and learning outcomes as well as assessing towards assessment standards. This speaks to educators being aware and conversant with education policy relating to curriculum and assessment. In Independent schools, however, this kind of administration is not required as long as schools “implement” the RNCS and complete the CTAs at the end of the Grade 9 year. The application of policy and documenting of teaching towards outcomes in macro and micro plans in Independent schools is determined by either the policy of individual schools or individual educators.

As the study is concerned with how the policy of teaching towards learning outcomes affects assessment practices; I was interested in the environment of an Independent school where education policy is not as “enforced” as in Government schools. The question of “policy” becomes interesting when it is not being enforced and verified at the micro level of the institution or by the educator.

3.5.1.2 The Independent school where the study was conducted

As indicated in Chapter 1, the site selected for this research is a co-educational Independent school situated in an urban area. In effect, the school encompasses three schools on one campus, spanning Grade 000 – Grade 12 with learner numbers of 1600. In general, the learners enter the school in the

Research Design and Methods Applied During the Study

Pre-School or the Preparatory phase and continue their schooling into the Senior Phase of the school. The school offers the Independent Examination Board (IEB) examinations in Grade 12, and for the past four years, has realised a 100 percent pass rate and excellent examination results in terms of exemption into university. The context of this study, however, is the Junior College or Senior Phase (Grade 7- 9) in which there are 360 learners. In 2002 – 2004 the school ran the Department of Education CTAs while in 2005 it chose to run the IEB CTAs. The school is affiliated to ISASA, which guides the protocols and policies followed by the school.

While the school's ethos is based on Christian values and principles, it is not allied to a particular denomination, and learners who are not of the Christian faith attend the school. It is pertinent to mention that the school is relatively new and has only been open since 1998. In this time, however a comprehensive co-curricular programme has been established covering a number of sporting disciplines, cultural activities, outreach and development, as well as an academic component and structures for learning support.

3.5.2 The Sample

As a result of the sample being a single respondent and not being representative of a group, the research generated will not seek to make generalisations about a broader population, but rather to understand a unique case. Individuals reading the research, however, may be able to relate to observations and findings and transfer these to their own experience (Creswell, 2003; Cohen et al., 2000).

3.5.2.1 The respondent as a sample

The sample used for the study is an educator who teaches in the GET band, specifically at Grade 9 level in the Language, Literacy and Communication:

English Home Language Learning Area. As mentioned in 3.5.1.1 the sample was selected as a result of an interest in and the understanding of, the impact of curriculum policy and the resultant assessment practices in an Independent school. This “purposive sampling” procedure draws on the principles of sampling (as cited by Merriam, 1998; Le Compte & Preissle, 1993; Marshall & Rossman, 1995 in Henning, 2003), drawing on elements of theoretical sampling. The sample is therefore someone who fits the criteria of a “desirable participant” in terms of their ability to help build the theory as recognised by the researcher as a result of their knowledge of the topic. The participant for this study had experience both prior to and post C2005 and RNCS implementation. Furthermore she has experience teaching in both Government and Independent education. Her experience, allied to her ability to make comparisons based on these criteria, makes her a “desirable participant”.

The sample also conforms to the concept of “convenience sampling” (Cohen et al., 2000: 102) as the researcher works at the same school. Convenience sampling was a factor considered as a result of the research design being that of a case study. This decision was largely practical: working in the same environment as the participant; the researcher had a great deal of access to the participant for fieldwork observation and interviews. Convenience sampling resulted in frequent contact with the respondent, enabling the researcher to better understand the realities of the “minutiae” of the respondent’s daily life Patton (2002: 48).

3.5.2.2 The sample of learners

The learner sample was derived from the Grade 9 Language, Literacy and Communication: English Home Language class, taught by the educator used as the respondent in this research. Their function in the study was within the context of the data collection process - three learners were interviewed to contribute to the process of triangulation. Initially four learners were selected

Research Design and Methods Applied During the Study

through discussion with the educator. However, having discussed with them their willingness to participate in the study and providing them with ethical statements to their parents – this will be discussed more fully in section 3.10 – one learner did not return their permission slip. As the three learners constituted over 10% of the class, it was decided not to coerce the other learner into participating. Furthermore, time constraints on the study resulted in a fourth participant not being selected.

Given that being interviewed while recorded is an intimidating experience; learners were selected on their confidence, ability to articulate and their ability to express their ideas effectively. Initially two girls and two boys were invited to participate. However, one of the boys was not interviewed. For the purposes of the study, the learners will be referred to as Learner 1, Learner 2 and Learner 3.

3.6 Data Collection

Data collection was initially guided by the literature review on assessment, knowledge (see sections 2.3.3 and 2.3.4 respectively), curriculum reform (see section 2.2.3) and the implementation of policy in South Africa (see section 2.2.5). Thereafter documentation on the respondent in the case study was gathered, including biographical information, academic records of learners taught in Grade 9 and teaching resources. This information was used to establish the viability of the research as well as to determine whether the participant was suitable as a case study.

The next phase began with a preliminary questionnaire to gain an understanding of the participant's conceptual understanding of issues relating to the study. This was followed-up with semi-structured interviews to clarify information drawn from the questionnaires in relation to the participant's experiences of curriculum reform through the institution of policy as well as practice. Fieldwork was incorporated into the study through observation carried out by the researcher

during the participant's Grade 9 lessons. Lastly, a more thorough document analysis was conducted of the participant's teaching resources. Learners taught by the participant were interviewed to triangulate data gathered from the participant in order to validate the study. As is indicated from the above reference to document analysis, questionnaires and interviews, the data collection was conducted using a qualitative methodology. Details of the data collection instruments are detailed in the sections that follow.

3.7 Instruments

This research makes use of a number of instruments to develop a holistic perspective of the case being studied in terms of a description and interpretation of the case study's context, experience and perspective. In order to develop an overall understanding of what has been observed and recorded during the data collection process, the researcher uses a variety of instruments to search for what Patton (2002: 59) refers to as the "gestalt"; meaning the total nature of the particular setting. The strength of this research methodology resulted in the researcher's ability to pay more attention to nuance, interdependencies, complexities and context (Patton, 2002). In Chapter One the research was referred to as policy-orientated. A characteristic of policy-orientated research is that it operates in the context of existing policy or practice (Nisbet, 2000). The instrumentation used for data collection therefore functions in the realm of "reality" making use of fieldwork, observation and interviews.

3.7.1 Questionnaires

An initial questionnaire was completed by the respondent to provide background information relating to assessment as well as experience. Given that there is only one respondent, the interview was open-ended as the purpose of the questionnaire was not to generate frequency (Cohen, et al., 2000) but rather to

Research Design and Methods Applied During the Study

gather data to help construct the interviews as well as for triangulation which will be discussed in 3.9.1.

3.7.2 Interviews

Interview Purpose

Four interviews were conducted with the participant during the course of the study and each learner was interviewed once. All interviews were conducted on a one-to-one basis (Creswell, 2003) and were audio taped with permission from the participant and the learners. As mentioned in 3.5.2.2 the learners were interviewed with the intention of using the data for the purpose of triangulation, which will be discussed more fully in section 3.9.1. The participant was interviewed to gain what is referred to by Patton (1990: 278 as cited in Merriam, 1998) as “a special kind of information” as the researcher aims to find out what is “in and on someone else’s mind”. The intention, through interviewing, was to find out about the respondent’s emotions, perspectives, attitudes and thoughts regarding the policy of teaching towards outcomes and her resultant assessment practices. In so doing the respondent is “accounting” (Henning, 2003:55) for her position and experience in relation to the research question.

With the above mentioned objectives in mind, an interview protocol was constructed, which rests on the principle of Kvale’s (1996: 4) explanation of the Greek meaning of the word, “method” – this he describes as “a route that leads to a goal”. Allied to this concept is his interpretation of the Latin word for “conversation” meaning “wandering together with”. In the light of the research design being a case study, which according to Merriam (1988: 21) is, “an intensive, holistic description and analysis of a single instance, phenomenon or social unit”; the intention of the interview protocol was to facilitate the relationship between the researcher and the respondent, allowing the researcher as close to

the respondent as possible in order to understand and be able to interpret her context in terms of data analysis - ultimately, enabling the researcher to answer the research question having worked together with the respondent.

The interview technique used for this study is referred to by Merton et al. (1990 as cited in Yin, 1994) as a “focused interview”. In this type of interview the respondent is interviewed for a short period of time – in the region of an hour. The interview is open-ended in that areas of discussion are predetermined and the questions are formulated in advance on an interview schedule. However, the researcher is able to modify or add questions during the interview depending on the responses of the respondent. The intention of the interviews is to help identify variables and relationships that will assist with the data analysis. The nature of the open-ended interview results in unexpected or unanticipated answers, which may suggest unthought-of relationships (Cohen et al., 2000) and is essential in the case study when interviewing for personalized information.

Interview Protocol

The interview protocol was designed by considering three main factors: Firstly, the questions were designed in order to gather data that would answer the research question. Secondly the format of questions, which considers the sensitive nature of interviews and thirdly, the mode of response required to gather relevant data.

The researcher made use of a mixture of questions which Tuckman (1972 as cited in Cohen et al., 2000) refers to as “direct” and “indirect”. In this way the researcher was able to make inferences from the respondent’s answers which gave insight into the respondent’s opinions. Careful attention was paid to the substance of the questions in order to elicit fact and opinion from the respondent. The questions sought answers referring to background information, description, experience, behaviour and feeling as defined by Patton (1980). The researcher

Research Design and Methods Applied During the Study

also made use of what Kvale (1996) refers to as “process” questions in order to introduce a topic and follow up on an idea as well as probe for further information and provide examples.

The order of the questions was also an important consideration when designing the interviews. The interview was broken up into “initial”, “intermediate” and “ending” (Charmaz, 2002) questions according to the sections covered in the interview. The interviews began with “initial” questions; these are open-ended and are used to put the respondent at ease as they require background information that draws from the respondent’s experience. Intermediate questions were used to introduce a topic and then probe for description and information by asking the respondent to provide examples. The interviews concluded with “ending” questions which required opinion and feeling.

Content Validity

In order for instruments to demonstrate content validity they need to show that they cover the items that they claim to cover (Chen et al., 2000). In order to achieve this, they need to conform to two further criteria, namely: sampling validity and item validity (Gay & Airasian, 2003). Sampling validity requires the instrument to cover the total content area that is being studied while item validity deals with whether or not the items are relevant to and measure the intended content area. In the instance of this study, an expert in the field of education, who has vast experience in the implementation of OBE, reviewed the interview schedule before it was implemented.

Interviews

Four interviews were conducted with the respondent. Two interviews relating to the respondent’s understanding of OBE and her perceptions of assessment were

conducted at the beginning of the study. The interview schedule contained questions regarding the respondent's perceptions, implementation and understanding of OBE. These interviews were followed up with the assessment interview, which focused on the respondent's use of assessment as well her understanding of the relationship between OBE and assessment. The information gathered in these interviews was used to inform two further interviews, which were conducted after observation and document analysis had taken place. The next two interviews focussed on curriculum and methodology and a further interview on assessment practices. The Curriculum and Methodology interview focused on the respondent's understanding of learning and knowledge; teaching methodology and style and, lastly, her practical implementation of OBE. Initially only two interviews were to be conducted, but as a result of the inductive nature (Merriam, 1988) of the case study, data emerged as data gathering and analysis took place. For this reason, two further interviews were deemed necessary.

Interviews were conducted with three learners as indicated in section 3.5.2.2 for triangulation purposes. These interviews focused on the learners' experience of English in their current environment; their preferences in terms of aspects of the class they enjoy; their experience of assessment as well as their experience of outcomes.

3.7.3 Observation

Three observations of the participant's Grade 9 English lessons took place during the course of the study. The purpose was to observe, without participating in or influencing the lessons, thereby conforming to what Creswell (2003: 179) refers to as "direct or non-participant observation". In the light of this study functioning in the paradigm of social science; the observation methodology reflects the importance of the subjective experience of the individual as mentioned in section 3.3.1. The observational strategy was therefore unstructured to facilitate the

Research Design and Methods Applied During the Study

process of a holistic approach to capturing data as the “events and actions naturally unfold” (Creswell, 2003: 179). The recording protocol did not predetermine categories for observation to take place; the observer merely documented what was observed. The observations include descriptive notes in which the physical setting as well as the activities of the class are given, as well as reflective notes which describe the process (Creswell, 1998).

3.7.4 Document Analysis

Documents analysed for the research include the educator’s resource file and record book, the resource file kept for Grade 9 English by the English Department, as well as the files of the learners interviewed for the study. The educator’s resource file included macro and micro plans as well as resources and teaching aids. The purpose of document analysis for this study was to “augment and corroborate evidence gathered from other sources” (Yin, 1994) while the analysis is concerned with the way in which the texts depict the reality of the educator’s experiences.

3.8 Data Analysis

The methodology used in this study has been identified as qualitative. Data was gathered through fieldwork in the form of questionnaires, interviews, document analysis and observation. Intrinsic to the research design and methodology used for this study is the search for that which is significant. As a result of this, the data analysis process separates the significant few from the insignificant many instances of behaviour (Cohen et al., 2000). The data analysis used for the purposes of this research therefore conforms to what Stake (1995 as cited in Creswell, 1998) refers to as “categorical aggregation”.

The questionnaires, interviews, observations and documents were used to identify instances that reveal issues relevant to the policy of teaching towards outcomes and the subsequent assessment practices. Categorical aggregation is therefore used to reveal meaning from the data that relates to the research question. The next step in the data analysis process is to develop “naturalistic generalizations” (Stake, 1995 as cited in Creswell, 1998) whereby people can learn from the case as indicated in the rationale of the inquiry as outlined in Chapter One.

To arrive at categorical aggregation and naturalistic generalizations the following process was followed: Interviews with the respondent and the learners were recorded on audio tape. These were transcribed by an independent party who has experience in transcription. The transcripts were validated by the researcher by listening to the recordings while reading through the transcriptions. Errors in the transcription were corrected so that the transcriptions were an accurate reflection of the interview. The analysis of the data began with coding. Coding of the interviews was a process of developing categories that arose from the data in order to conform to what Punch (2005) refers to as open coding – this is discussed more fully in Chapter 4. While categories arose from distinctions in the data, the conceptual framework of the study, as well as the research question, were used to guide the coding process. Once categories had been established, they were further refined into subcategories for a more refined analysis. Categories were then described and analysed in terms of the relationship between the subcategories and the categories before conclusions were drawn.

3.9 Validity and reliability

This study takes into account the multiple perspectives that exist regarding the verification of qualitative research in the search for credibility. For the purposes of this study, the terms: trustworthiness, transferability, dependability and

Research Design and Methods Applied During the Study

confirmability (Lincoln and Guba, 1985) will be used. In order to operationalize this terminology the process of triangulation of data sources, a rich description as well as member-checking by the participant will be used to establish credibility. What follows is a description of the processes involved in ensuring credible data analysis.

3.9.1 Triangulation

Denizen (1989 as cited in Stake, 2000) defines triangulation as, “a process of using multiple perceptions to clarify meaning”. Yin suggests (1994) that a major strength of case study data collection is the opportunity to use multiple sources of evidence. In so doing, the researcher is able to use multiple sources for the purposes of confirming the data as well as ensuring that the inferences drawn from the data are dependable. This therefore makes triangulation intrinsic to the study by the nature of the research design and methodology. Triangulation was used in the study as a tool to gain an in-depth understanding of the case in question by adding “rigor, breadth, complexity, richness and depth” (Denizen & Lincoln, 2000: 5) and in so doing, establish “convergent lines of inquiry” (Yin, 1994). In order to achieve this, a combination of instruments as mentioned in section 3.7 was used. The chain of evidence and patterns, or themes, that emerge from these indicate that the data are dependable.

Patton (1987) identifies four types of triangulation, two of which have been applied to this study – data and methodological triangulation. By applying these types of triangulation to the study; conclusions were drawn from and based on several sources of information following what Yin (1994: 92) refers to as a “corroboratory mode”. **Data triangulation** draws on a number of data sources in order to corroborate the same facts. In this particular case, these data were formulated from a questionnaire, interviews, observations and document analysis. The research acknowledges Patton’s (1980 as cited in Denizen, 2000) perspective that the comparison of multiple data sources will never lead to a

single consistent picture. However, the research makes use of his assertion that different levels of data may reveal different aspects of what is being studied. The purpose of conducting in-depth interviews as well as making use of observation, created different levels of data that revealed different aspects of the respondent's perceptions of methodology and practice and the reality thereof - In this way, different kinds of data "illuminated various aspects of the phenomenon" (Patton, 2002: 559). **Methodological triangulation** was used to gather data through the use of multiple methods, namely: a questionnaire, interviews, observation and document analysis. This kind of triangulation resulted in the research yielding what Denizen (2000: 321) refers to as "a different picture and slice of reality". In the instance of this research, the data from the questionnaire was used to confirm data yielded in the interview while data from the observations and document analysis identified "convergent lines of enquiry". The multiple sources of evidence gathered for triangulation essentially provided multiple measures of the same phenomenon and in this way contributed to the quality of the research (Yin, 1994).

3.9.2 Member Checks

To conduct a member check, the respondent was given copies of the transcripts to confirm their accuracy. The respondent was also asked for their view on the findings, interpretations and conclusions made by the researcher in order to establish credibility. The respondent was asked to give their opinion of the descriptive language used as well as to provide her own observations and interpretation. By having the respondent judge the accuracy and credibility of the account, the researcher was able to check the data in terms of trustworthiness.

3.9.3 Rich Description

A description that is rich and thick facilitates the process of transferability. Having given a detailed account of the site, sample and context; the researcher enables the reader to make decisions regarding the transferability of the information to other settings. Transferability results when characteristics in the study are shared with those experienced or known by the reader.

3.10 Ethical Statement

As mentioned in Chapter One, I work at the school where the study took place. Consent to conduct the study at the school was granted by the principal and an educator was approached to function as the respondent in the case study. In the light of the design being that of a case study, I recognise what Stake (2000) refers to as a “moral obligation” between the researcher and the respondent as they share personal views, disclose information and discuss circumstances. In the light of the “moral obligation” a preliminary interview was conducted with the respondent to clarify the purpose of the research, the use of the findings and to establish the ethics of the research. It was made clear that participation was voluntary and that the respondent had the right to withdraw at any point in the study. The respondent was also assured that she would remain anonymous and that the researcher would respect her need for privacy and confidentiality when writing the report. Once this had been completed the researcher entered into an agreement of “informed consent” (Cohen et al., 2000) with the participant.

Initially four learners were approached to participate in the study. The study and its purpose were explained to them as well as their role in the research. They were assured of anonymity and confidentiality on the interviews that would take place. All four learners indicated their interest in the study and subsequently a letter of consent was sent to their parents. The letter contained a reply slip which

was signed by the learners' parents and returned to me. One of the learners did not return their reply slip and, as already mentioned, was not included in the study.

Finally, documentation was submitted to the Ethics Committee of the University regarding the study, its protocols and the instruments used. Having reviewed the submission relating to this study, the committee gave consent for the study to take place.

3.11 Conclusion

This chapter has covered the research design and methods applied during the study. The intention of the study was clarified as exploring and describing the tension between the policy of teaching towards outcomes and the resultant assessment practices in a Grade 9 Language, Literacy and Communications class in an Independent school. The intention of the study places it in the paradigm of social science as it is educational research. The research design of an instrumental single-respondent case study locates the study within the interpretive paradigm. The research design was defended by developing the intention of the study as seeking to understand an individual and her perceptions within a given context. Furthermore, the research paradigm was explored by locating the individual and her experience of the world within an interpretive epistemological framework. The research paradigm was then applied to the constructivist-behaviourist context underpinning the learning dimension of the study by considering the way in which meaning is shaped.

As a result of the research question defining the intention of the study as the need to explore and describe a particular case, the research methodology selected was that of a qualitative approach. The data collection processes conformed to the methodology in the form of interviews, observations and document analysis. Finally, the data analysis made use of categorical

Research Design and Methods Applied During the Study

aggregation to develop codes and themes in order to describe and analyse the data.

Lastly, the chapter presented issues relating to trustworthiness, transferability, dependability and confirmability. These terms were unpacked by considering how they relate to developing research that is credible. This was achieved by examining how the process of triangulation, member checking and a rich description are built into the study. The chapter concludes with reference to the ethical considerations involved in the study.

CHAPTER FOUR

4 Research Results and Analysis

4.1 Introduction

This chapter is a detailed account of the analysis and the interpretation of the data. As explained in the research design in Chapter Three, the context, conceptualisation and method of the research process within the study draws on a qualitative approach. The qualitative data, gathered in the form of document analysis, questionnaires, interviews and observation, was analysed using categorical aggregation as explained in section 3.8. The analysis, using rich description, is done with the intention of giving an account of the understanding, perception and experience of the educator in relation to the policy of teaching towards outcomes and the effect it has had on her assessment practices.

Section 4.2 addresses how categories were developed in relation to the data and the research question. Furthermore, the section details the development of subcategories to provide the analysis with rigour, clarity and depth. Lastly, section 4.2 addresses the relationships between the categories as an aspect of the analysis. Finally, section 4.3 concludes the chapter by summarising the results of the data analysis in relation to the research question.

4.2 Developing Categories for Data Analysis

Once the interviews had been transcribed, the next step in the study was to develop categories that could be used to analyse the data in order to answer the research question. Categories were developed by working through the

Research Results and Analysis

transcriptions and identifying the observations that would be included and those that would be excluded. As indicated in section 3.8, categories were not predetermined; instead they arose from the data. It was imperative that the categories be “grounded” conceptually and empirically by relating to the context of the case study as well as the empirical material (Dey, 1993: 96). The process used to code or create categories was, therefore, that of open coding (Punch, 2005).

Categories were developed that answered the question, “What governs this phenomenon in this context?” The researcher was able to develop categories that answered this question by considering the data presented in the interviews. The categories were created based on distinctions in the data and in the light of the research question and sub-questions (see section 1.4). Categories were created that indicated the respondent’s understanding and interpretation of education policy and by considering how this constructs her behaviour. The categories also considered how the behaviour emanating from the respondent’s understanding and interpretation of policy affected how she taught towards outcomes as well as her assessment practices. In so doing, the categories recognised the subjective opinion of the respondent within an interpretive paradigm.

The categories also coincided with the conceptual framework of the study as defined in Chapter One. The element of the educational system that concerns this study is that of the process - how the process of teaching towards outcomes has affected assessment practices as impacted on by the input of a change in education policy as discussed in section 1.6.

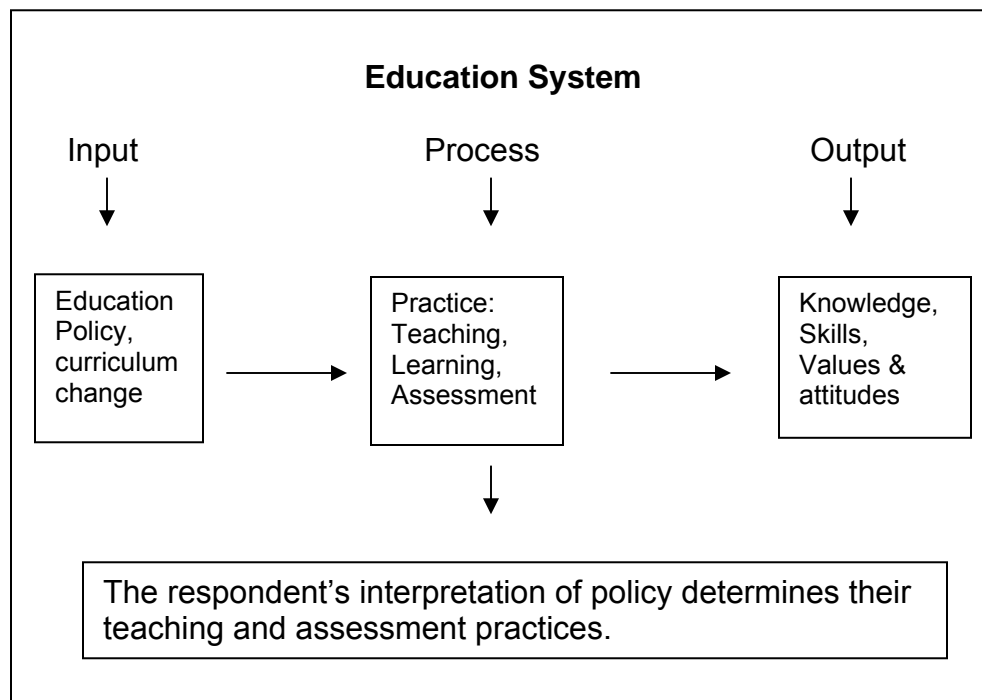


Figure 4.1: Conceptual Framework applicable to this study

4.2.1 Identifying Categories for Data Analysis

By making use of the computer software ATLAS.ti to create categories, the researcher was able to develop a list of categories, as well as group categories, according to the data. These categories relate to the educational process identified in the research question. As a result of categories being created based on distinctions in the data; the list of categories was long, and in terms of analysis unwieldy. It was clear that the list of categories needed to be refined. In order to refine the list, the researcher had to take cognisance of the data, what ideas were expressed by each bit of data as well as the context of the data. By developing a set of criteria in terms of when to assign a category to the data the researcher was able to focus the categories on criteria that arose from the conceptual framework and the research question. Table 4.1 lists the categories as well as their criteria.

Research Results and Analysis

Category	Criteria
Policy	Include any data where policy and its effects can be observed.
Environment	Include any data that refers to the educator's experience of teaching as well as factors that impact on experience in terms of environment.
Teaching	Include any data which relates to the educator's understanding and perception of teaching as well as factors that impact on teaching.
Learning	Include any data that relates to the facets which relate to or are associated with learning.
Assessment	Include any data that relates to the conceptualization and practice of assessment.

Table 4.1: Criteria for the creation of categories

Having refined the list of categories by providing criteria for determining whether or not a data bit was allocated to the category, the researcher recontextualized the data by viewing it in the context of the categories that had been created, rather than its original context (Dey, 1993). The original list of categories had been spliced to create integration and this was achieved by using criteria to determine whether or not a data bit would fall into a particular category. However, as a result of recontextualizing the data, it became apparent that while the categories provided a framework for the analysis and data could easily be assigned to a category based on the criteria, the distinctions in the data required subcategories that allowed for a more refined analysis. Subcategories were therefore developed to provide the analysis with greater resolution and detail.

4.2.2 Identifying Subcategories within Main Categories

Subcategories were not only assigned to give more clarity and depth to the analysis, but also as a result of the need for a formal division based on frequency. Furthermore, subcategories were developed as a result of the researcher's search for the "significant few" (Cohen et al., 2000). When assigning data to the subcategories, the same criteria applied as to the main category. However, subcategories addressed additional issues that impacted on the main category. Finally, the researcher began establishing links between the subcategories in order to determine how they are interrelated; the impact they have on each other and the role that they play in relation to the main category. Section 4.3 will draw together the categories and subcategories in relation to the research question and sub-questions.

Main Category	Subcategory
Educational Policy Reform	Policy as an agent of change
	Impact of Policy on teaching, learning and assessment
	Training as a result of a change in policy
	The impact on lesson planning as a result of a change in policy
	The demands made on time as a result of a change in policy

Table 4.2: Coding system explaining the factors impacting on teaching practice as a result of educational policy.

Research Results and Analysis

Main Category	Subcategory
Environment as a factor in curriculum delivery	Experience as a determinant in teaching practice
	Personality as a factor of teaching methodology and style
	Independence as a factor of attitude towards teaching
	Role of the educator

Table 4.3: Coding system explaining the factors impacting on the teaching environment.

Main Category	Subcategory
Process of Teaching	Teaching methodology as an aspect of the teaching process
	Teaching style as an aspect of the teaching process
	OBE methodology as an aspect of the teaching process
	The impact of methodological change on the teaching process

Table 4.4: Coding system explaining the factors influencing the teaching process.

Main Category	Subcategory
Learning as an aspect of the teaching process	The learning process as an aspect of the teaching process
	Knowledge as an aspect of the learning process
	Skills as an aspect of the learning process

Table 4.5: Coding system explaining the factors influencing the learning process.

Main Category	Subcategory
Assessment as an element of the teaching process	Assessment methodology as a factor of curriculum change
	Role of assessment in the teaching process
	The role of the process of assessment
	The role of different types of assessment
	The role of outcomes-based assessment
	Summative assessment as a part of the assessment process
	OBE reporting as part of the assessment process
	Assessment standards as means of determining standards

Table 4.6: Coding system explaining the factors influencing assessment practices.

Having identified the central categories as the main strands of the analysis and linking subcategories to the main strands through the criteria, the researcher had fulfilled two aspects of the categories. The first was to ensure the internal aspect of the category – this was accomplished by assigning a data bit according to its ability to fulfil the criteria of the category in which it was placed thus making it meaningful in relation to the data. Secondly, the category had to be meaningful in relation to the other categories in order to fulfil the external aspect of the category. The linking of subcategories is discussed in section 4.2.3.

4.2.3 The Linking of Subcategories for Data Analysis

The linking of categories was an act of recognising substantive relations, which recognise how categories, and the data they represent, interact (Dey, 1993).

Research Results and Analysis

Links were therefore derived from the research question in terms of the educational process as well as inferred from the data. The intention, having established the relationship between subcategories, was to form a category set rather than a collection of unrelated subcategories. Once this had taken place, category sets were linked in terms of common threads or themes that emerged from the analysis of the data.

4.2.3.1 Discussion of the factors impacting on teaching practice as a result of policy change.

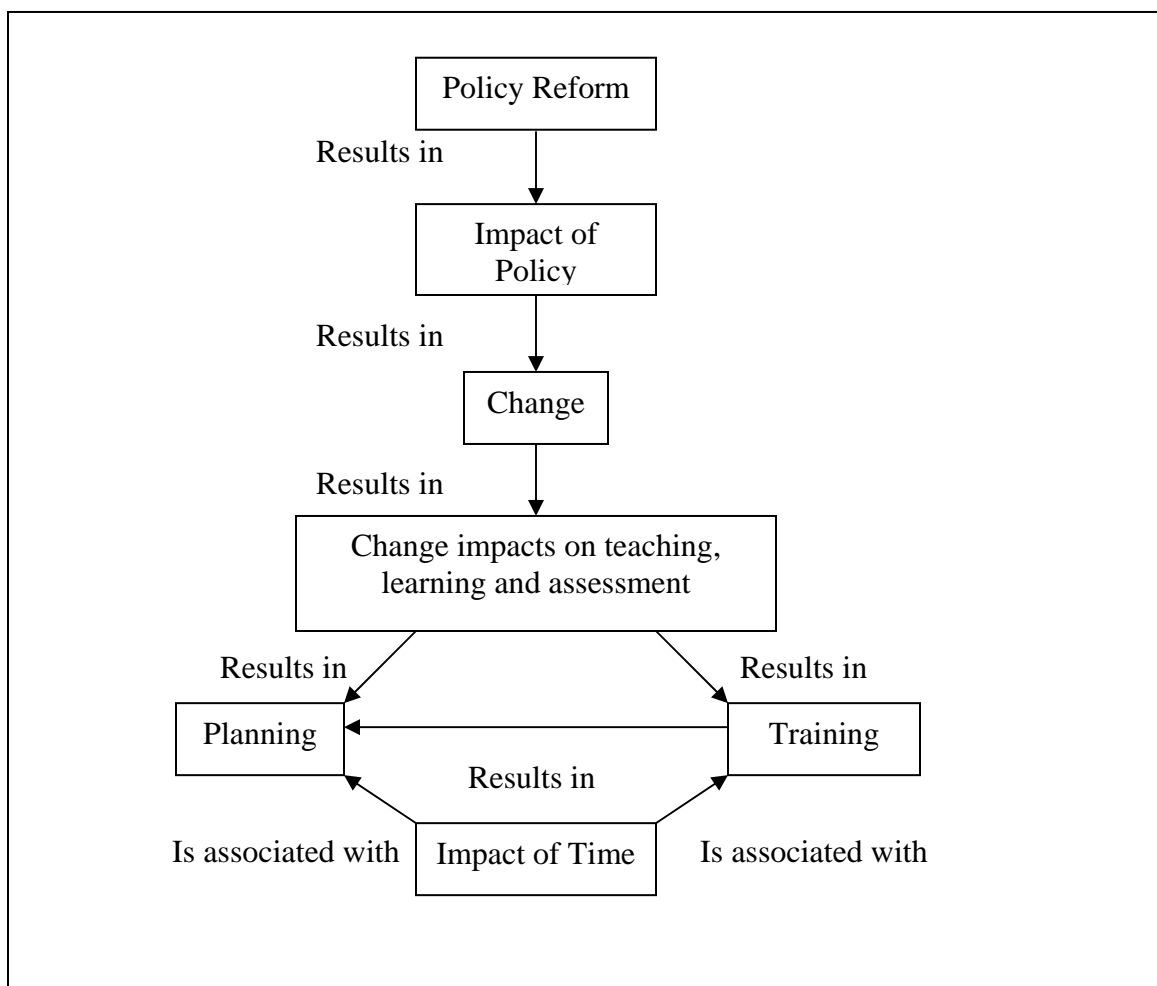


Figure 4.2: Policy and the relationship between its subcategories

The response to a change in curriculum policy

The literature review in Chapter Two describes the policy shift that took place in education resulting in OBE becoming the methodology used to implement the Revised National Curriculum Statements. Policy, in terms of the conceptual framework of the study, is regarded as an input into the system. The respondent regards the change in policy as “good” and describes some of the new systems as “fabulous”, however the term “willy-nilly” as well as the statement, “things often seem to change for no reason” implies a sense of frustration which can be regarded as the impact of change. The concern that policy changes for no reason, appears four times within the space of two statements. This observation links to the respondent’s opinion that when a new person “takes over...they want to change things”. The respondent develops this observation further by stating that, “they said it’s a political thing, I think that also puts the teachers off.” This relates to the observation made in Chapter One by Jansen (1999: 147) who asserts that OBE will fail, not as a result of, “politicians and bureaucrats [being] misinformed about conditions of South African schooling, but because this policy is being driven, in the first instance, by political imperatives that have little to do with the realities of classroom life.” Change for the sake of change as well as the lack of an educational imperative for change starts becoming a central thread that runs through the respondent’s perception of policy change.

The impact of changed policy on the perception of curriculum

The respondent refers to the Curriculum Statements as “cumbersome” and the outcomes as “ambiguous”. These statements bring to light the complexity of the documentation and therefore its ability to be assimilated effectively by educators as well as its practicability for implementation. This perspective is emphasised by Young (2000) who indicates that the complexity of the curriculum documentation overwhelmed educators. The respondent suggests again that the shift in policy, which determines a change of curriculum, demands time to

Research Results and Analysis

become au fait with the documentation. This is regarded as wasted time. “Why bother” becoming au fait with the documentation is stated by the respondent as she is convinced that, intrinsically, she is covering the required outcomes, “information that I’m doing anyway”. This statement reveals that the respondent is marginalized from the curriculum statements based on contributing factors such as ambiguity, lack of clear purpose and practicability. Merriam (1988) reinforces this by suggesting that educators will not experiment with a new methodology unless they have confidence in its success. The respondent refers to the policy as “illogical” and “irrational” as a result of politics. The demands placed on educators as a result of policy and curriculum change do not take into account the current demands made of educators in terms of preparation, marking and teaching as well as the roles performed outside of the classroom, such as co-curricular activities. Once again, the impact of a change in policy is regarded as an intrusion that is unnecessary and unrelated to the practicalities of teaching. Related to this point, is the respondent’s reference to lesson development and planning that could be taking place instead of the time spent becoming familiar with the outcomes. The lack of understanding of the practicalities of teaching and its demands by policy makers is highlighted. Malcolm (2000) supports this assertion by suggestion that the experience and working conditions of educators were trivialized in the face of curriculum development.

The change in policy is experienced by educators in the form of a changed curriculum – initially C2005 and in relation to this study, the RNCS. When asked what impact the change in policy has had on the educator’s teaching practice, the respondent indicates that her practices are not noticeably different, but that, “I’m very confident that I am doing it anyway.” The implication being that the change in policy, and therefore curriculum, has not necessarily resulted in a change in practice, but rather that the respondent had already been teaching towards outcomes. This point is reiterated in the discussion about covering the skills required by the new curriculum. The respondent suggests that while skills were covered in the past, the change in methodology has only resulted in skills

being “identified more clearly”. This is supported in the literature by Bellis (1999) who discussed the explicit application of outcomes. The educator acknowledges that she is unable to name the outcomes without the curriculum statement, and that she does not tick off outcomes for every piece of work. She goes on to say that through the wide variety of activities offered in the English class, the outcomes are all covered. The document analysis revealed the term plan on which all of the outcomes, both critical and specific as well as the assessment standards appear. This implies that the planning has taken cognisance of the requirements of policy and the RNCS. While the educator may not be aware of the use of outcomes for every lesson, they seem to underpin the curriculum that is delivered. It is possible that as a result of the respondent “just becom[ing] more used to it” she is no longer as aware of outcomes as she was and that they have become intrinsic to her methodology.

The impact of changed policy on the perception of methodology

The respondent goes on to link the concept of change in policy not only to concerns about not understanding the need for change, but also to teaching methodologies, “We know that we are doing a good job, I am confident in myself that people are learning well”. In this quotation the respondent suggests that if learners are learning successfully then her methodology is sound. Furthermore, she believes that she is doing a good job and, therefore, applying policy for the sake of policy is undesirable. She implies that, “by making me do all sorts of weird and wonderful things, introducing new policies that don’t always seem to be logical just for the sake of politics,” she is not given space to concentrate on what is methodologically sound. The respondent reinforces this point by suggesting that a change in curriculum takes place only on paper and that the important development of educators takes place through experience and by being “guided practically”. This observation is interesting in the light of how rapidly policy change took place (see section 2.2.2). The suggestion here is that it is from experience and training that educators develop a sound methodology

Research Results and Analysis

and understanding not through policy and curriculum change. This is further highlighted in her observation about how through experience – which will be explored further in the next category – she knows what learners need to know: “I know exactly where they need to be and what they need to have achieved from the various aspects of the syllabus.”

While the previous statements may have suggested certain negativity from the respondent towards policy and curriculum change, she goes on to discuss the importance of not just changing one methodology for another, but combining the two. She discusses the benefits of a methodology that provides the learners with clarity and understanding in terms of what outcomes need to be achieved: “with OBE the learners are more aware of what is expected of them, they are more focussed, they are more guided, they have more direction – so there we have definite benefits.” The respondent makes the suggestion that “if we can combine the old with the new, give them lovely focus it will show the stability of the old sort of system.” By making this suggestion, the respondent suggests that the most positive manner in which new methodologies can be implemented is by combining the strength of the new with that of the old.

The impact of changed policy on lesson planning

“We try not to do the same work with the same grade all the time.” This quote from the respondent identifies her view that she has a responsibility to the learners to develop material that is new, relevant and current. It also mentions time as a factor in the role and responsibilities of an educator. Developing new materials is time consuming and in the light of the respondent’s scepticism of the motivation behind policy and curriculum change, she feels time should be spent on planning that which is methodologically and educationally sound. When the respondent was told in training that new materials would have to be developed in line with an OBE methodology, her understanding of the need for change in terms of the implications for planning and the imperative for time spent on

implementing these changes has brought to bear on the situation. Once again, the implementation of policy and curriculum is seen as an imposition that places additional demands on educators.

The respondent also discusses a shift in her approach to planning because of a shift in her methodology. She makes reference to group work as a methodology that is related to OBE and discusses the need for thorough and effective planning in order to implement it effectively. She also makes reference to projects and the practice of a more transparent approach to setting these, which provides outcomes and criteria. The respondent notes the difference in practice with the following observation, “In the past projects were just given.” It becomes apparent that while it is time consuming to develop materials using this methodology, the educator sees the benefits of certain OBE methodologies and implements them when they are perceived to be practical and relevant to the learning process.

While the respondent has acknowledged that she does not use the set outcomes explicitly, there is evidence of an outcomes based methodology in operation in the documentation received by learners at the start of the term as well as in her presentation of lessons. This is apparent from the following statement, “When I was at Wits...the lecturer used to say ‘This is what we are going to do’...it was there in black and white...I’ve done the same thing.” This is reiterated when the respondent discusses her approach at the start of a lesson: first explaining what will be covered as well as what the intended outcomes of the lesson will be. This was substantiated by the learners, all of whom stated that the educator makes the outcomes of lessons explicit, as well as during my observation of lessons on all occasions during observation, the educator began by stating what the lesson would entail as well as what the desired outcomes were.

The respondent's attitude to training for the implementation of OBE

One of the frustrations with regard to OBE implementation mentioned by the respondent is the initial training that educators attended; she makes the following observation, "There was a lot of negativity and I think it was because the people who were implementing it didn't really seem to understand what they were doing." Having been a representative for a district and attending provincial seminars, the respondent was exposed to a number of addresses and discussions regarding implementation. The literature indicates how a top-down approach to training created a negative impact (Malcolm, 2000). Her perception was that educators felt the new policy to be "pie in the sky" and hoped it would go away. She also suggests that educators became frustrated with the time that was wasted by having people conduct training who were not knowledgeable about OBE, "At one point a woman conducting the meeting said she actually didn't understand what was going on." The respondent's experience is that attending cluster meetings and discussing difficulties in implementation with other educators, as well as what was working and what was not, was better training than that given by the Department of Education. This observation is concurrent with opinions expressed by Potenza and Monyokolo (1999) with regard to the effectiveness of implementation being based on effective training.

The perceived implications for assessment as a result of a change in policy

The respondent observes that the area in which the impact of the change in policy and curriculum has been most felt is in her assessment practices. She views this in a positive light, particularly the use of a rubric as an assessment tool. The respondent's perception is that rubrics define outcomes and provide learners with an understanding of what is expected of them. While this aspect of change in assessment is viewed by the respondent in a positive light, she balances the positive with negative aspects.

The respondent reiterates the point about change for the sake of change when making an observation about how policy change has impacted on assessment in the following manner - The idea that marks were initially to be done away with, results in the observation that, "I just don't see the point, I don't see how it is going to help anybody with anything." This comment is backed up with the statement, "If there was a good reason, I think it would be fine, but I don't see any good reason." The educator links this comment to concerns about how the shift in policy and, therefore, its impact will impact on time: "In fact it just seems to become labour intensive, so we've got to re-do everything for no particular reason." From these observations it becomes clear that the educator feels frustrated not only because policy change is unclear, but also because, from her perspective, it lacks purpose and will result, not in a better methodology, but in more labour from educators. The observations made by the respondent create the impression that she is caught between the positive aspects the new assessment methodology has to offer and the frustration of the imperative driving the change and the implications of the demands that will be made on educators' time.

The learners' experience of policy change

Finally, the respondent makes reference to the impact that the change in policy and curriculum has had on the learners. She mentions three aspects in this regard: learners being more aware of expectations, time and stress. Her perception is that, as a result of the implementation of OBE, learners are, "more aware of what is expected of them, they are more focussed, they are more guided, they have more direction." Airasian (2001) and Guskey (2003) support the view of the need for assessment to be formative and to help in the decision making process. For these reasons, the respondent believes that OBE has benefited learners. This is reinforced by the observation that, "they understand what they are working towards." However, as a result of the demands made by portfolios and CTAs, the respondent feels that learners are being placed under,

Research Results and Analysis

“enormous pressure”. The respondent highlights that this is unfair, particularly in the light of the portfolios: “The Matric portfolio is less comprehensive than the Grade 9 portfolio...whoever is implementing actually doesn’t understand.” One might argue that currently the matrices are not functioning within the OBE paradigm, however, the reality remains that the volume of work should be incremental as learners move into higher grades. There are other facets to education, such as the co-curricular programme in which learners are involved, that the respondent believes are impacted on due to policy and curriculum change. These facets are an important aspect of education that the policy makers do not necessarily take into consideration, and the respondent’s view is that this then adds to the stress and pressure under which learners are placed. The observation about policy decision makers not understanding this aspect of education links to a previous point about the impetus for change being political and not educational as well as the understanding that the requirements are not practicable. It also highlights the point that perhaps more time should be spent educating educators regarding the need for OBE and the requirements of restructuring co-curricular programmes to accommodate a more demanding, and presumably, a better quality education.

4.2.3.2 Discussion of the factors impacting on the teaching environment

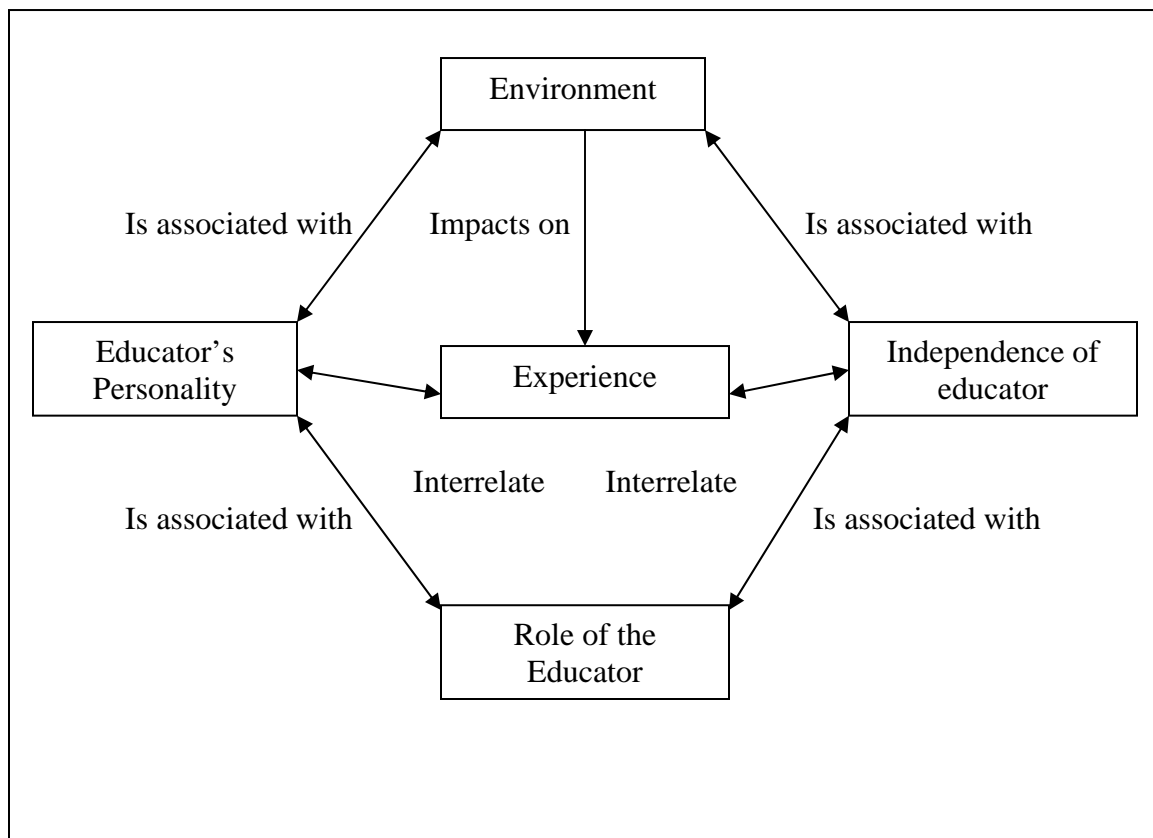


Figure 4.3: Environment and the relationship between its subcategories

The role the environment plays in delivery of OBE

The respondent recognises the role environment plays in her current experience of OBE: “I think being in an Independent school definitely helped because I think we have a lot more choice.” Here she is making reference to the type of documentation, planning, assessment and implementation that is required by the DoE as opposed to the IEB and ISASA as mentioned in section 3.5.1.1. She contextualises the role environment plays in assessment with particular reference to the CTAs. “Children come from different schools and different areas, so what might work in a CTA for one school definitely won’t work for another school”.

Research Results and Analysis

Implicit in this statement is the respondent's understanding of internal school factors as well as broader external factors contributing to the ability and frame of reference of learners. These factors would include: the type of school – Government or Independent; the school environment – the management as well as the daily running of the school; the school community – teaching staff as well as the local community; geographical location of the school and the socio-economic status of the community in which the school is located. This suggestion is borne out by the IEB's decision to develop its own CTAs independently of the Department of Education. While these CTAs conform to the same framework in terms of outcomes, tasks and assessment criteria; their content and it has been suggested, their standard are different. Implicit in this is that the IEB have different requirements of their learners.

The perception of independence on the respondent's attitude to teaching

While this code only appears once in the transcripts and may be regarded as an element of personality, it can also be regarded as an example of the "significant few" instances of behaviour as referred to by (Cohen et al., 2000). For this reason, I felt it appropriate to deal with it independently. This subcategory provides an important insight into the character of the respondent. It arose from a question regarding what the respondent finds exciting about education, aside from her passion for the learners as mentioned previously in the transcript, the respondent mentions independence. "First of all it is quite independent, you are your own boss, you decide what you are going to do, and no day is ever the same." This is a significant statement in light of the respondent's perception of policy change and the implications of imposed structures. It also speaks to research that indicates that a shift in policy can lead to educators feeling marginalized (see section 2.2.4). Should the educator feel that she is operating outside the paradigm of the changed curriculum, independence becomes a driving and motivating framework. This is particularly relevant in this case as the respondent feels that the framework offered by the change in policy and

curriculum is not necessarily educationally sound as it is motivated by a political imperative.

The role of personality in teaching methodology and style

The respondent makes reference to how she perceives that an educator's personality impacts on three areas of the education process, namely: implementation, methodology and style. In so doing she suggests that personality, as a factor, plays a role in practice. The choice or development of teaching methodology and style is as a result of an individual's personality. This understanding is linked to the previous subcategory of independence, "You are your own boss, you decide what you are going to do, and no day is ever the same." The implication is that the respondent understands that in terms of practice, educators are fairly autonomous in their classrooms. Therefore, while a change in policy and curriculum may have taken place, educators' understanding of these, the way in which they experience the imperative driving this change as well as their personalities will determine how, and to what extent, these changes are implemented on a micro level in their classrooms.

In response to a question about her understanding of teaching style, the respondent makes the following observation, "Teaching style would be the way that you approach the class." She elaborates by saying that, "some people are more casual, some people are very structured, some people allow more creativity." This has direct implications on methodology, as determined by policy and curriculum. In the instance of this research, OBE methodology makes certain demands of teachers that were not made of them in the past, such as a shift towards more learner centred practices. The respondent suggests that depending on an educator's personality, they will be more or less successful when implementing this kind of change in methodology. She links style to methodology in the following statement: "The type of person that you are and your teaching style will influence the method that you choose or are most

Research Results and Analysis

comfortable with.” The word “choose” once again refers to the element of independence while the word “comfortable” suggests that educators will not implement a methodology unless they are capable of presenting it in a manner consistent with their personalities.

The respondent contextualises this in terms of her own personality and experience, “Because I’m sometimes pedantic, I’m perhaps not as open to various assessment practices that other people might be.” This acknowledgement, as well as previous comment, infers that firstly policy change can only be successful if educators are willing to buy into it, and, secondly, if they are capable of delivering what is required by methodology in a manner consistent with their personalities. From the respondent’s view, the process of education that takes place on the micro level of the classroom is largely dependent on individuals and for this reason the success or failure of policy implementation is completely subjective. Educators can use outcomes in the development of materials and in their planning; however, the practical application of these through methodology is based solely on the educator’s teaching style, which is driven, amongst other things, by personality.

Experience as a determining factor in teaching practice

The respondent has been teaching for ten years and has taught in both Ex Model C schools and in an Independent school. She also teaches at a Saturday morning school, which is an outreach project for learners who come from disadvantaged backgrounds. Her experience is primarily in teaching English as a home language to learners from Grade 7 to Grade 12. In addition to her classroom teaching experience, she has marked Grade 12 final year exam papers for both the Gauteng Department of Education and the IEB. The study is located within the context of the respondent’s current experience in an Independent school. References are also made to previous experiences as they form the framework in which she has developed as an educator and in terms of

this study, how past experience impacts on current practice. Reference will be made in later sections as to how her experience is linked to other criteria such as methodology, practice and assessment, while the focus for this category is primarily on how experienced has shaped her as an educator with environment as a contributing factor.

“In private education there seems to be more discipline, so children are definitely more accountable and the learning environment is definitely a lot more conducive to teaching, so because of that I’ve become a softer and kinder more empathetic teacher.” This quote establishes how the respondent views the impact of the teaching environment on educators as well as on how they are able to relate to and interact with learners. This has implications for the delivery of teaching and learning and, for this reason, the implementation of policy and curriculum. This is further highlighted when she observes, “If you’ve got a happy, quiet, well set up environment, I know as far as teaching is concerned, it is so much easier to teach and therefore it must be so much easier for children to learn.” Once again the respondent makes reference to personal preference and the type of environment in which she likes to teach as well as to how, her perception of how this impacts on learners. She develops this thought further in terms of how her experience of environment impacts on delivery, “first of all because the teachers are so much happier and secondly because everything just works, everything flows, all the systems are in place.” The respondent’s views on what makes an environment conducive for effective and efficient delivery as well as learning were noted during the observation period. The manner in which her classroom as an instance of environment, is decorated with motivational posters and learning material; the care taken with resource material laid out on bookshelves; filing drawers in which to keep work as well as the notice board and white board as sources of information, such as homework and the calendar of events, suggest the respondent’s desire to create a friendly, welcome environment in which learners feel comfortable and able to learn. Her reference to “quiet” and “happy” as factors, from her experience, lend themselves to an effective learning

Research Results and Analysis

environment and are reinforced by; her disposition in the classroom; the way learners wait to be greeted before they sit down and answer and ask questions; as well as her interactions through anecdote and humour.

The respondent also identifies her experience as a determining factor in how she understands her role as an educator. She regards experience as the factor that has governed how this role has changed over time: “I think to me education, or my view of education has become more holistic, whereas before I was teaching just a subject, now it is more about the children and getting to know them.” Her perception of how learners relate to her is fundamental to her understanding of the success of her teaching: “when you actually see that they are enjoying your lesson...you can just see that things are dynamic and things are happening and our results are good and then you see that you are doing a good job, and you don’t need all sorts of statements to say it.” The environment that she creates in her classroom, allied to how learners respond to her lessons, forms the basis for her experience of how learning is effectively and successfully achieved. This is allied to her understanding of what teaching practice should be as opposed to being based on statements – curriculum – that are, once again, expressed as an unnecessary intrusion.

Furthermore, the respondent traces her experience and development as an educator by considering factors such as confidence, experience and subject knowledge. She observes that, “When I started teaching, oi, yoi, oi...I must have bored them to tears. Because I was so..., because I was not confident...whereas now I can try new things and I don’t have to be quite so rigid.” This observation is important as it reinforces the respondent’s assertions about how educator’s perceptions of themselves, and what they are and are not able to implement, is tied in to experience as well as confidence. From this statement it also becomes clear that the respondent is not unwilling to try new and different methods of teaching. Inferred in this is that she must feel confident with the methods and, as implied in previous statements, is that these methods

must have a sound imperative underpinning them. This statement is corroborated with an observation the respondent makes about her ability as an assessor and the difference experience has made to her ability to assess: “being a first year teacher for example, and how I marked then and now how I mark”. She also refers to “trial and error”: gaining experience and becoming more confident when she remarks: “I think it’s like a circle, you try new things, you become more confident, you try new things, trying new things sort of broadens you, you become more confident, so I suppose confidence and trial and error.” This statement is significant in the light of policy and curriculum change. Experienced educators, who have gone through this process of trial and error and have developed confidence in their teaching methodology and style, are more likely to be resistant to change. Once again this addresses the concern about educators feeling marginalized as a result of change, which has implications for the implementation of new policy and curriculum.

The respondent also refers to the importance of learning through experience as opposed to through instruction: “the experience of it is probably, or probably more important than being taught teaching methodology at varsity.” In response to a question about teaching methodology, the respondent makes the following observation: “It’s not something that can really be taught; you know you can give people ideas and the way that they apply it is probably having the experience of it.” She links this idea to the impractical advice given to her by a lecturer who assessed her during her teaching practical: “The person who came to do the assessment firstly had never taught and they gave me all these fancy ideas and it sounded wonderful.., but because that person had never taught they didn’t know what a class was like, what would work with a bunch of 16 year olds.” The respondent echoes a previous statement about the frustration of having uninformed or inexperienced people training and commenting on educational. This is significant in relation to the respondent who clearly values experience, and the development and insight that this provides, as integral to the effective development of an educator. Related to this perception is a previous comment

Research Results and Analysis

about the understanding of when she is doing a good job coming through interaction and result as opposed to through an outside imperative. While this may suggest the respondent is inflexible, and to some extent resistant to change, the following observation suggests otherwise: “I feel I’m learning all the time...but I think I’m growing and learning all the time and it is good.”

Finally, the respondent links experience, content knowledge and confidence as contributing factors to successful curriculum delivery: “If you understand your content, if you’re confident about the content, if you’ve had experience in teaching I think that’s the most important thing.” In so doing, the respondent makes the point that it is the practice of teaching and its contributing factors that is fundamental to successful delivery and not the policy or curriculum statements. She reiterates this point by asserting once again that in order to develop into a successful educator, it is not curriculum statements, but the practice of teaching: “what people need is to learn by doing.”

The role of the educator

The respondent views her role as an educator as both a subject teacher and a mentor, “and being more of a mentor as well as just a subject teacher”. She attributes her understanding of what her role as an educator is, to her experience. “I’ve become softer and kinder or an empathetic teacher.” As a subject teacher she sees her role as, “imparting [knowledge] either by us speaking or developing materials, activities that children can discover for themselves.” From this statement it becomes clear that the respondent views her role to be guiding learners towards knowledge, learning and discovery. For reasons discussed in previous subcategories, this is as a result of her experience, which is determined by the environments in which she has worked as well as her personality and how this has contributed to her development as an educator. She does also suggest that learners play a significant role in the learning process: “They have to be the ones sitting here and internalising it and

coming to grips with it and questioning...it definitely just can't come from teaching." This suggests that the respondent does incorporate an OBE methodology, which is learner centred, in the environment of her classroom. This is corroborated by the observation, "I often just let things happen." This information was corroborated during the observation period when learners were working on a short story. The respondent would frequently allow the lesson to veer from its original outcome so that learners could explore ideas and concepts through discussion and debate.

The educator also views her role differently in relation to different classes. She asserts that, "different classes require different things, and what works with one class might not work for another." This implies that the environment of the class can change depending on the dynamic of a particular class. She suggests that these different needs of classes, "some classes are stronger, some classes are more motivated, some classes are more disciplined and often you can do different things with a more disciplined class", require different types of interaction from the educator. This implies that the role of the educator shifts and needs to be dynamic in order to cater for these different needs. The respondent is very aware of this and is prepared to make this shift, suggesting that she is open to different possibilities for delivery and willing to try different strategies.

When referring to OBE and effective delivery thereof, the respondent refers to it being the responsibility of the educator to have sound teaching methodology, as well as experience, in order to deliver it efficiently. Her perception is that many educators do not have these strategies in place and, as a result, learners are floundering: "If teachers have got no idea of methodology, their children are floundering, they are doing what the text book says, but they are leaving these children to their own demise." This statement ties in to the respondent's understanding that methodology and experience underpin effective delivery and if that is not in place, no amount of policy, curriculum or, in this case text books, can facilitate learning. This highlights the role of the educator in the educational

Research Results and Analysis

process as pivotal for learners to learn effectively. In the view of the respondent, without educators who have a sound methodology and experience, policy and curriculum may as well not exist.

4.2.3.3 Discussion of the factors influencing the teaching process

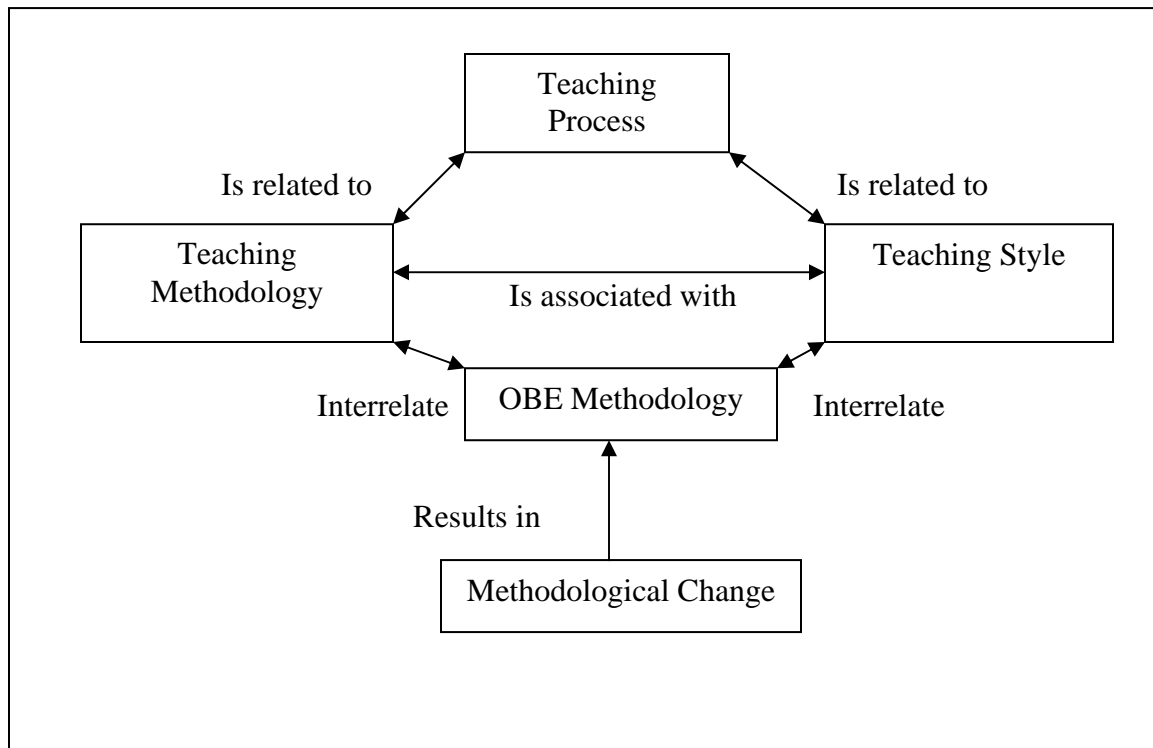


Figure 4.4: Teaching and the relationship between its subcategories

The respondent’s definition and understanding of the term teaching

The respondent identifies teaching as “conveying information”. This is linked to her perception that the role of the educator is to provide learners with the necessary knowledge, materials and activities from which to learn. As a definition, it is teacher centred as it places the educator in the role of a provider of information and the learners as recipients. However, this definition must be mediated by the respondent’s other observations of the role of the educator to

facilitate and assist in the process of learning as well as her understanding of teaching methodology which is to facilitate learning through different learning opportunities.

The respondent's definition and understanding of the term teaching methodology

The respondent identifies teaching methodology as, “the different ways in which you teach.” She states that a teacher doesn't only teach in one way and must therefore apply different teaching methodologies: “you don't only teach in one way.” She contextualises this statement within an English class, “in some cases...I would lecture, often you would sit and have a class discussion..., we would debate...you could teach through a group situation.” This statement clarifies the respondent's understanding of the need to apply different methodologies while the methodologies that are suggested, contain examples which are both teacher centered as well as learner centered. The respondent's practice of different methodologies was evident during the observation period: Lessons would often begin with a teacher-centered approach through lecturing or guiding the discussion and, during the lesson, would then take on a learner-centered approach when learners were encouraged to debate an idea or groups were formed to come up with a concept. This is further corroborated through the document analysis where evidence of different methodologies is found in lesson planning.

The respondent's definition and understanding of the term teaching style

The respondent defines teaching style as: “The way that you approach the class.” Environment is regarded by the respondent as a contributing factor to teaching style. The link is defined by the change of teaching style that took place when the respondent moved from a Government school to an Independent

Research Results and Analysis

school: “I think the style has changed in that in Independent education there seems to be more discipline, so children are definitely more accountable and the learning environment is definitely a lot more conducive to teaching.” The respondent is suggesting in this statement that while style is flexible it may also be determined by the environment in which teaching takes place.

She also links the concept of teaching style to personality with the following statement: “Teaching style would be the way that you approach the class, you know some people are more casual, some people are very structured, some people allow for more creativity.” The respondent links the concepts of teaching style and methodology observing that, “the type of person that you have and your teaching style will influence the method that you choose or are most comfortable with.” Within this observation, the respondent once again links the practice of teaching to personality and preference. The use of the word “choose” also suggests independence, and that educators have the autonomy to select which methodology works for them. This goes back to the respondent’s suggestion that, “you are your own boss”. One can suggest that for an educator who has such a clear sense of methodology and style being linked to personality and autonomy, the implementation of new policy and curriculum would be seen as an imposition, especially in the light of learners achieving in final matric exams.

The respondent’s perception and experience of methodological change

The respondent’s understanding of the change in methodology brought about by OBE was that, “It was going to be a new system that would involve less input from the teacher, more from the children, children would learn for themselves, we will be facilitators as opposed to teachers.” For an educator, whose methodology is underpinned by her role facilitating the acquisition of knowledge, the shift in methodology was not too different from what she was already implementing in her classroom. When questioned about the extent to which the respondent’s methodology changed when implementing the new curriculum; she replied, “not

very many [changes], I understand that some teachers in some schools just used to rote teach, but I've never done that." The implication of this statement is that the respondent was already implementing methodologies that were outcomes based. This is highlighted in the respondent's observation about group work as an outcomes-based methodology: "Yes there's group work and we are supposed to do more of that but we did it in the past." The respondent develops this thought in the following observation: "You know what I've done, is sort of tried to merge the two systems. I think as far as English is concerned, it was always an OBE style."

Her understanding of "merging" the two systems is based on a balance between a teacher centered and learner centered approach: "I would explain things myself and they would do activities in groups and do research on their own." The respondent justifies this perspective with the following observation: "As far as grammar is concerned, they need to know what grammar is, you don't just discover grammar for yourself, you have to be taught what it is." She believes that a balance can be reached in the following manner: "I think the basics are what they still need, so they need the basics of being taught and told 'this is the way it is' and then the freedom to explore that OBE gives." This perspective was evidenced during the observation when the respondent initially directed the conversation and then allowed learners the opportunity to explore and discover other possibilities. In respect of this balance, the respondent once again makes reference to the fact that she was using an outcomes-based methodology prior to OBE implementation: "but I've always done that even before the OBE system was introduced." The respondent also introduces the idea that English, by the very nature of the subject, lends itself to an outcomes-based approach. This can possibly explain the respondent's lack of understanding for a need to change curriculum and policy. If the respondent's understanding was that an OBE methodology already formed the basis for her teaching and methodology, the change to policy and curriculum would seem unnecessary as it was already intrinsic to her teaching methodology. Certainly during observation, the

Research Results and Analysis

respondent made use of a variety of methodologies which would support her claim that if her methodology has not changed, then she has always used different methodologies. This is also supported by evidence from interviews conducted with learners in which they describe the different approaches the respondent has to different aspect of English. The respondent talks about the limitations of a very learner centered approach in terms of time. She suggests that, “children discovering things for themselves and learning things for themselves takes a lot of time.” This is the respondent’s justification for the need for a balance between a learner centered and a teacher centered approach to teaching.

The respondent notes the following in terms of the impact a change in environment had on teaching methodology when the respondent moved from a Government to an Independent school: “The methodology didn’t change at all,”. This suggests that the environments are not dissimilar thus the structures of what is delivered stay the same; it is merely the delivery that changes. From the observations of the respondent, the development of methodology is as a result of experience in the classroom. What can be deduced from this observation therefore, is that teaching methodology is fundamentally the same; it is style that is impacted on by external factors.

The one area in which the respondent does acknowledge a shift in methodology is in relation to assessment practices. The respondent makes the following observation: “So before we knew that this is exactly what we wanted them to do, but we didn’t put it into words, it was vague whereas now it’s a lot more solid.” She acknowledges that there has been a shift in the way she thinks about assessment. Transparency is introduced as an integral aspect to assessment in criteria that are defined, thus giving clarity to what is being assessed: “It’s a lot more solid”. The respondent goes on to suggest that the way assessment is structured now in terms of the revised curriculum, “concretises what we all knew before.” This understanding of the change in assessment by the respondent

suggests that the change in assessment methodology was a simple shift as the understanding was there, but merely not articulated. The respondent links a shift in assessment methodology to teaching towards outcomes in the following way: “Before I would say, for example, ‘tomorrow I want you to do a piece of reading’ and I think well what do I actually want them to get out of the lesson, what do I hope they will have achieved.” This speaks to the respondent understanding the need to define outcomes, which focuses educators in terms of what they assess and learners in terms of what they must work towards: “I would put that in the rubric, which sort of focuses me as well as them.”

The respondent’s perceptions of OBE methodology

The respondent defines outcomes as: “Certain standards that learners would need to have achieved in order to move to the next level.” As defined in the previous subcategory, the respondent views an outcomes-based methodology as one that teaches towards outcomes, by defining them clearly. She recognises the need for an outcomes-based methodology, but only in combination with other methodologies, as indicated in the previous subcategory: “I do believe that it has a place but together with various other methodologies as well, ”The respondent reaffirms previous assertions about outcomes–based methodology being learner centered, “I would say it is a more learner based teaching.” Once again the respondent highlights her perception that this is a methodology that had already been implemented, “I think the teachers were doing it anyway.”

In order to effectively deliver OBE, the respondent asserts that educators require, “a very sound knowledge of teaching methodology.” She suggests that if this is not the case then, “children [will] flounder.” This is a reference to the role the educator must play in the classroom in order for effective learning to take place. She also refers to the need to make outcomes explicit to learners: “You just don’t launch into a lesson, you have to say this is what we are going to do and this is what we are going to achieve.” This was evidenced in the observation when the

Research Results and Analysis

respondent explained at the beginning of each lesson what would be covered and why. She also relates the need for providing outcomes of tasks, such as projects, which have specified outcomes as well as rubrics. In relation to the English class, the respondent suggests that the variety of tasks covered means that different outcomes are dealt with, “in a variety of ways.” The respondent therefore, recognises the role of outcomes in relation to delivery in the classroom, tasks and assignments. From this we can draw the conclusion that the respondent views outcomes as integral to the educational process. The respondent’s understanding of OBE relates to Spady’s (1994) definition of outcomes as well as the Killen’s definition (2000) of OBE being a classroom practice.

4.2.3.4 Discussion of the factors influencing the learning process

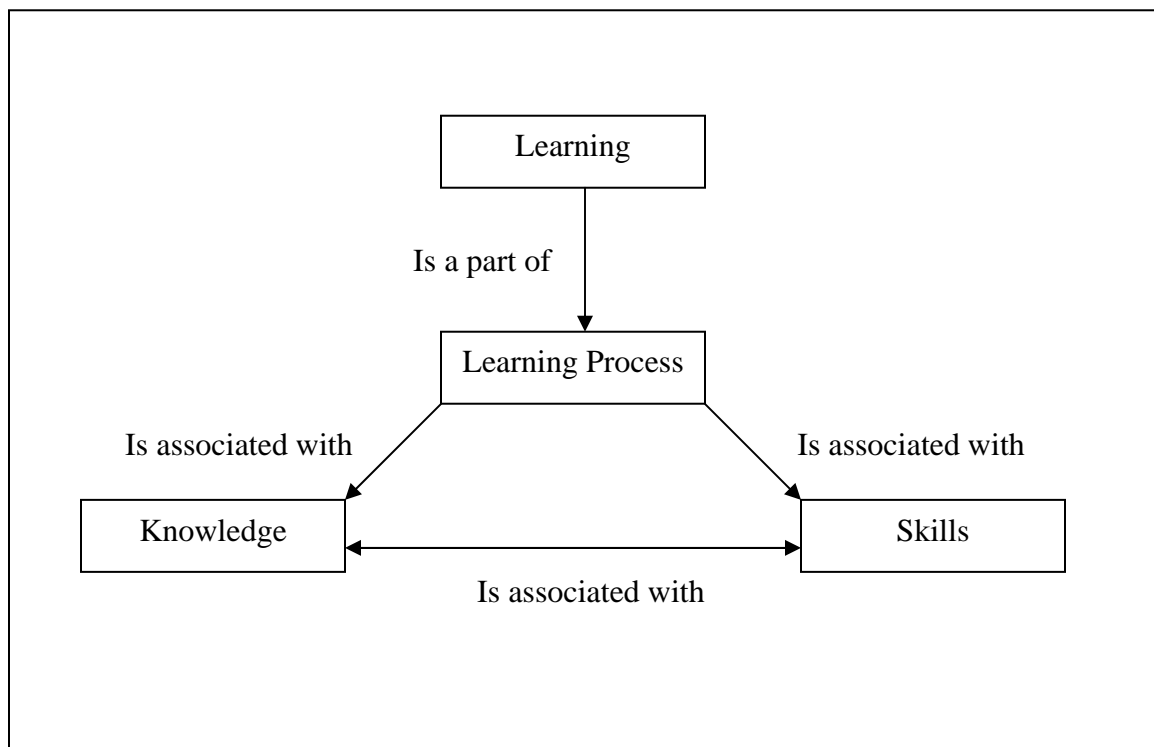


Figure 4.5: Learning and the relationship between its subcategories

The respondent's definition and understanding of the term learning

The respondent defines learning as, “coming to understand new concepts, new ideas”. She clarifies this by explaining that, “learning is receiving and understanding and processing [information].” Within this definition, the role of the educator is implied; “receiving information” suggests that it is the role of the educator to provide information. She develops this further by stating that, “we have the knowledge and you have to impart it either by us speaking or by developing materials, activities in which the children can discover for themselves. But we have to be there...we have to be the ones facilitating that.” The role of the learner is related to understanding and processing information: “I think a very active role, they have to be the ones sitting here and internalizing it and coming to grips with it and questioning...it definitely just can't come from teaching.” Once this has taken place, the respondent suggests that learning has occurred. The concept that the educator provides the framework for the facilitation and organization of knowledge, as suggested in the definition of learning provided by the respondent as well as in the subcategory: Teaching Methodology, relates to the constructivist paradigm in which this study is located (see section 3.2.3). While the terms “understanding” and “processing” define the role of the learners as constructing their own meaning. The terms “internalizing” and “coming to grips with” also relate to the Behaviourist elements of OBE, as suggested by Spady (1994), in which the learning outcomes come from outside, in this case the educator (see section 3.2.4).

The respondent's definition and understanding of the term learning process

The respondent defines the learning process as an interactive role between the educator who “facilitates” learning and the active role played by the learner: “They have to be the ones sitting here and internalizing it and coming to grips with it.” She goes on to suggest that the learning process can be regarded as

Research Results and Analysis

“holistic.” Thus learners also learn from, “the way that you interact and by experiences that you have with other people.” Once again, this taps into the Constructivist paradigm which suggests that learning takes place when learners “co-construct” in activities with their peers.” Through this suggestion, the respondent is identifying strongly with the constructivist paradigm that underpins the RNCS. This, once again, highlights the possibility that her failure to see the imperative behind policy and curriculum change, may be as a result of her already functioning within the paradigm.

The respondent acknowledges that learning is a process and not just an event in the following statement: “Learning comes in various stages, so often things need to be built on, the concepts or ideas need to be built on in order to acquire the overall knowledge.” This observation is clarified in the following example, in which the respondent discusses the incremental acquisition of knowledge from one grade into the next in relation to poetry. She suggests that first learners learn about “content” then “figures of speech” and then “punctuation” until finally, “by the time they get to matric they understand we need to be looking at all those sorts of things in a poem.” In acknowledging the process of learning, the respondent articulates the relationship between outcomes and assessment standards. Furthermore, the respondent indicates a fundamental understanding of the requirements of C2005 and the RNCS for educators to focus on a desired level of education. While outcomes remain consistent across grades and phases, assessment standards change according to the progression of grades; and implicit in this, is the development of the learner. In drawing this conclusion about learning as a process, the respondent indicates that her conceptual understanding of learning is concurrent with that expressed in the RNCS. Evidence of the respondent’s understanding of learning as a process was obtained during observation. The educator would often question and probe to identify learners’ understanding or knowledge of an idea or concept before developing or building on that understanding. This relates primarily to the respondent’s understanding of her role and her being able to, “assess the various

stages that people are or that learners are in class and pitch your lesson accordingly.”

Learning as a process is linked to methodology by the respondent when she states that, “I think if you are a halfway decent teacher, you realize the children have to engage as well. For me just standing up there and talking is not going to work.” Implicit in this suggestion is that educators have to implement different methodologies in order to ensure that the learning process is dynamic and appropriate to the learners. The respondent contextualises the need for different methodologies in an English classroom: “just talking is not going to work especially with a subject like English.” This observation implies that English lends itself to different methodologies, which facilitate the learning process. Different methodologies were observed in the respondent’s classroom, particularly when the respondent was trying to achieve different outcomes with the class. This suggests that the respondent uses different methodologies when what is required of the learners, in terms of learning, understanding or assimilating, differs. Seemingly, the respondent understands the need for different methodologies when different learning processes are taking place. Furthermore, the link between methodology and assessment is made by the respondent when she indicates that projects incorporate different learning processes such as research, which plays a role in providing different opportunities for learners to acquire knowledge during the learning process.

Finally, the respondent links assessment to the learning process. She links different assessment methodologies with the learning process such as “peer assessment” as well as the use of a “rubric”. Learning from peer assessment once again refers to the Constructivist paradigm in which learners co-construct knowledge through interaction with their peers: “When you assess other people, you learn, so it helps you in learning.” In terms of the role a rubric plays in the learning process, the respondent suggests that it falls within the Behaviourist paradigm as the rubric is constructed out of learning outcomes that need to be

Research Results and Analysis

achieved. Learners use the levels of achievement in which outcomes are divided into to assess their success in achieving the necessary outcomes. The respondent views the benefits of a rubric as a tool to facilitate the learning process. Learners are able to use a rubric to, “go back to their previous piece of work...they could have a look where they went wrong and use that to improve.” This quotation clearly defines assessment as playing a role in the learning process, with is ongoing and learner centered. This ties into the assertion by Reddy (2004) that assessment must have a clear curricular purpose.

The respondent’s definition and understanding of the term knowledge

The respondent defines knowledge as, “concepts and information that you have learned.” She also suggests that knowledge is more holistic than just being about facts and suggests that it also relates to “maturity”. As a result of this definition, the respondent makes a distinction between knowledge that relates to personal development and content-based knowledge. She describes the acquisition of content-based knowledge as a process of “listening in class”; “getting involved in what is happening in class”; “ask[ing] questions”; “contributing”, “studying” and “researching”. From this definition of knowledge, it becomes clear that the respondent views the acquisition of knowledge as a process that requires interaction from and between learners, a process of co-constructing through interactions; placing the respondent’s understanding of the acquisition of knowledge in the Constructivist paradigm.

The respondent views knowledge, learning and skills as interrelated and interdependent. She asserts that, “without learning, you cannot acquire knowledge.” She develops this train of thought by suggesting that, “skills make it easier to acquire knowledge by learning.” This is contextualised in an English classroom where she talks about the need for knowledge of, “what a noun is, a verb, that sort of thing, that would be more knowledge based.” The respondent then links the need for knowledge in order to implement skills through the

following observation: “answering a comprehension question effectively, producing a good speech, those are skills and yes you would need knowledge for those skills in order to master them”. From these observations we can assert that the respondent’s perception is that learning is the process through which knowledge is acquired and that different strategies need to be applied for this to be successful. She then goes on to develop her understanding of the relationship between skills and knowledge by suggesting that skills require a knowledge base from which to operate.

The respondent’s definition and understanding of the term skills

Skills are defined by the respondent as: “Something that makes it easier to acquire knowledge by learning.” Further to this definition she suggests that skills can only be implemented through understanding, and therefore knowledge of, a concept: “They [knowledge and skills] definitely are linked.” The respondent contextualises this in the English class through the use of an example: “we looked at how to deconstruct questions...we broke them down into the steps or stages of how you would answer them...by doing that, acquiring those skills, comprehension technique would be much easier.” The respondent reinforces this with a further example from the English class by linking the knowledge of the plot of a novel to the implementation of the skill of analysing why a character behaves in a particular way. This understanding is displayed during observation when the respondent first determines learners’ understanding of a concept before discussing the skill of how to analyse it.

Once again the Constructivist paradigm is evident in the respondent’s understanding of how assessment and skills are linked. She asserts that when listening to each others’ speeches, learners are able to learn what makes a good speech from each other. This understanding of assessment and skills also relates to the Behavioural paradigm as the outcomes which are established to determine whether or not a speech is good are determined by the educator and

Research Results and Analysis

therefore come from outside. By demonstrating the way in which the respondent's understanding of the role of learning, knowledge and skills are interrelated and how they operate in the Constructivist and Behaviourist paradigms, it can be suggested that the educator's teaching methodology and practice are rooted in the same philosophy that has underpinned policy and curriculum change. The views of the respondent are reinforced by the assertion of du Toit and du Toit (2004) that learning is constructive and collaborative.

4.2.3.5 Discussion of the factors influencing the assessment process

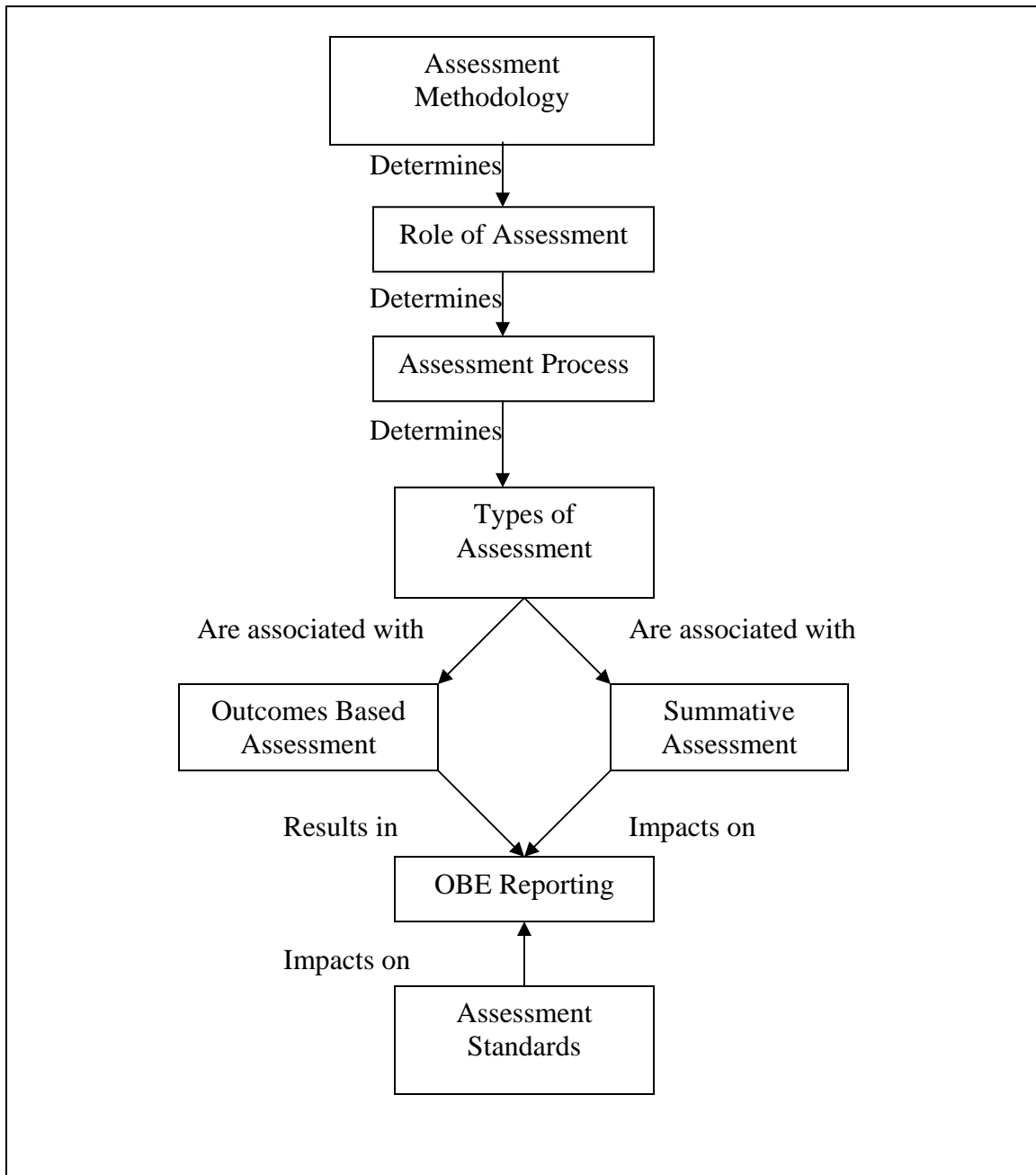


Figure 4.6: Assessment and the relationship between its subcategories

Assessment methodology as a factor of curriculum change

The respondent observes that the biggest impact of curriculum change has been on her assessment methodology. She suggests that the introduction of the rubric as a form of assessment plays a far greater role than it did in the past. Implicit in this observation is that as a result of curriculum change and the implementation of an outcomes based approach, her assessment methodology now takes cognisance of and incorporates outcomes into the process. “We give them a rubric and they look at what they are doing right and what they are doing wrong, especially based on the rubric and then when they do the next one it would help them.” From this observation, it is clear that assessing according to a rubric makes outcomes transparent. It also becomes clear that the respondent does not view assessment as an end point, but rather as a learning process. Learners therefore work towards achieving outcomes through a process of assessment. Implicit in this observation is that outcomes are determined in the form of a rubric before assessment takes place. As the respondent has indicated that assessment is based on what learners have been taught, we can deduce that she is teaching towards outcomes.

The role of assessment in the teaching process

When discussing the role of assessment, the respondent suggests that it has a number of purposes: “to understand what learners know and what they don’t...whether they are coping with the course and whether they can qualify for the next grade...so that you understand what you need to focus on.” This suggests that she sees assessment as an interaction between educator and learner as a learning process. Lubisi et al. (1997) reinforce the need for assessment to be part of the feedback process as it is essential element the learning process. The respondent suggests that educators need to be guiding

the learning process and they can do this effectively if they are able to determine learners' abilities. For this purpose she suggests baseline testing at the start of a year: "What's nice is to give an assessment right at the beginning." Her justification of the role of this type of assessment is, "to be able to analyse where they are and what they need to know and then you would need to teach various skills and concepts." The respondent suggests that learners can also play a role in assessment by assessing themselves to see what aspects of the work they have and have not grasped as part of the learning process. She then goes on to discuss formal assessment once the necessary skills and concepts have been taught to then measure whether or not these have been acquired.

The respondent suggests that assessments are based on different levels and divided into different sections. This facilitates and focuses the respondent's understanding of what learners do and do not know. Implicit in this decision is that while learners may be working towards common outcomes, they achieve them according to different levels. To aid in learners understanding their own achievement of skills, the respondent suggests self and peer assessment: "When you assess other people you learn." This suggestion, once again, relates to the Constructivist approach that underpins the RNCS and suggests that the educator is operating in this paradigm in relation to assessment.

The role or purpose of assessment is also defined by the educator as an opportunity to define specific outcomes, which you want learners to achieve and then to measure whether or not they have. She also touches on the need for this kind of assessment to be transparent so that learners understand what outcomes they are working towards. "Write down exactly what you want to see the learner doing...the learner understands what is required." It is clear from the above observations that, to an extent, the respondent has incorporated outcomes into her assessment practices.

Research Results and Analysis

The respondent's definition and understanding of the process of assessment

The assessment process is defined by the respondent as: “not only about marking a person's work and giving them a symbol, but you also need to assess the various stages that people are ...and pitch your lessons accordingly”. This suggests that the respondent views the assessment process as integral to teaching and learning. The respondent uses assessment to gauge what has been learnt, what needs to be taught as well as what has been taught. This understanding of assessment as a feedback mechanism to provide an evaluation of teaching and learning is supported by Lubisi, Wedekind, Parker and Gutlig (1997).

The respondent acknowledges that she received no training for assessment during her university training and that, subsequently, she has only been on one assessment training course. She therefore admits that she is “insecure” when marking more subjective aspects of English such as oral and creative writing work. “I think I'm growing and learning all the time and it is good,” suggests that the respondent is open to the development and growth of her assessment practices and to her role in the assessment process.

The role of different types of assessment

The respondent identifies two types of assessment: summative assessment, which is based on marks and is usually conducted at the end of a unit of work or year; and outcomes based assessment, which is formative and forms part of the learning process. She suggests that the nature of English, “lends itself to different types of instruments” such as “tests” and “rubrics”. This is as a result of the facets of the subject, such as comprehension, grammar, oral work and creative writing. Likewise, she concludes that because of the nature of these

facets, they demand different types of assessment. The respondent clarifies how the different types of assessment are used throughout a section of work, illustrating how the different aspects of English require different types of assessment. This illustration also suggests that the respondent understands the need for different types of assessment.

The different types of assessment are identified by the respondent as having different roles (see section 2.3.3). Peer assessment is identified as providing an opportunity for learners to learn from each other, while the same observation is made about self assessment. She makes the observation that rubrics, in particular, form part of the learning process as learners can use the rubric as a guide to identify which outcomes they have and have not achieved in order to help them improve. It is also suggested that a rubric provides more focus for the learners in terms of what is expected of them and therefore impacts on what they are able to deliver. From these observations, it is emphasised that the respondent views assessment as part of the learning process.

The respondent introduces the concept of reliability in terms of assessment when discussing self and peer assessment. One of the reasons she provides for not making use of marks or levels obtained from self and peer assessment is that they are not “reliable”. The respondent regards herself as experienced and objective enough to assess learners and deliver an assessment that is reliable.

Summative assessment as part of the assessment process

The respondent makes very few references to summative assessment. She refers to assessment taking place at the end of a unit of work to determine whether or not learners have acquired the necessary skills and concepts. She also makes reference to recording marks in her mark book at the end of a term for assessment that has been conducted.

The respondent's perceptions of the role of outcomes-based assessment

“Specifically with regard to assessment, there’s a wonderful benefit.” This is the respondent’s reaction to a question relating to the benefits of implementing OBE. She goes on to elaborate on the necessity of implementation as the benefits for learners are “important” by alerting learners to what is required of them. The respondent goes on to link teaching towards outcomes and assessment by suggesting that outcomes concretise what educators require from learners and provide clarity of expectation for learners (see section 2.3.6). These observations are in relation to assessments conducted prior to the implementation of OBE in which the respondent, “just sort of tended to assume” that learners knew what the outcomes of a literature essay were. The benefits of outcomes-based assessment are seen in the light of the educator and the learner. She suggests that as a result of knowing what your outcomes are going to be, “it forces you or it would focus you on the tasks you have planned and the assessment tasks would...would lead to outcomes.” This kind of focus is introduced from the start of the educational process as the respondent asserts that planning takes place at the beginning of the year: “It is at this point that outcomes and assessments are planned”. This is corroborated by the planning documentation in the educator’s resource file, which indicates learning outcomes, assessment standards and assessment activities.

The respondent identifies most with the rubric as a form of outcomes-based assessment and states that it has had the most impact on her teaching methodology as a result of policy change. The rubric is regarded by the respondent as an assessment tool that can be used in a variety of contexts including: “oral work”, “creative writing” and “literature essays”. She clearly states that a rubric is constructed using the outcomes an educator wants to see learners achieving and that learners can work towards these in a transparent manner. She also regards outcomes-based assessment as a process of learning: “They could go back to their previous piece of work...and use that to

improve.” The respondent suggests that rubrics make learners, “accountable for their own learning.” They have to implement the rubric by considering what outcomes need to be achieved and to what level as well as by going back after an assessment and identifying where they have not achieved outcomes.

Outcomes-based reporting as an aspect of the assessment process

The respondent identifies the reporting system used at the Independent school where she teaches as reporting by way of marks, which are derived from both summative assessments as well as formative outcomes-based assessment, such as rubrics. The report also reflects levels which report on the skills or outcomes which are required to be achieved by learners as defined in the curriculum statements and corroborated by the planning document developed by the school. An example of the school report was obtained for analysis and clear evidence was seen of a mark as well as learning outcomes assessed according to levels.

Assessment standards as a factor determining standards

Assessment standards are defined in the RNCS and change according to grade and phase in relation to the expected level at which learners are expected to achieve outcomes. The respondent makes use of these standards internally, as is evidenced in the school’s planning documentation, as well as externally in relation to the CTA. The respondent’s observation about the CTA is that it is inconsistent: some years it is below standard and instead of providing a national standard for the GET, grossly underestimates the capabilities of her learners. In other years it is “ridiculously difficult”, making it difficult for educators to form an understanding of what the Education Department’s understanding of what the expected assessment standard is in the GET. An element of standardisation is achieved across cluster groups as they meet and share resources and ideas, but the respondent suggests that educators do not want to offend each other and, because of this, comment about standards is minimal.

4.3 Conclusions drawn from the case study

The conclusions drawn from the study will be consolidated in relation to the sub-questions arising out of the main research question. In addition to answering the sub-questions, further conclusions that arose from the data will be discussed.

The first sub-question guiding the study asks the question: Does a change in curriculum policy necessarily affect a change in teaching methodology? The intention of the sub-question was to explore the effects of a change in curriculum policy in relation to teaching methodology. This was initially achieved by considering the respondent's experience, understanding and perception of the change in curriculum policy. Thereafter, the study addressed the respondent's teaching methodology prior to and after the implementation of curriculum reform. From the evidence gathered and the analysis of the data, the following observations can be made in answer to the question: The reform in curriculum policy has effected a change in the respondent's methodology in relation to assessment practices, but not noticeably in her teaching methodology. This is because she is caught between the positive aspects of change, which she regards as defining outcomes and skills more clearly and also being able to assess directly towards these, and the negative impact of the imperative behind the change: the qualities of the curriculum; poor roll-out and ineffectual training. This is the legacy of C2005, which has remained with the educator. For this reason the RNCS has had little impact. From this observation, we are able to conclude that while little change has been effected in the respondent's teaching methodology, the practice of teaching towards outcomes has impacted on the respondent's assessment practices.

Furthermore, the respondent highlights the importance of experience and the role this plays in teaching. One can conclude from her statements that it is experience, as well as an understanding of one's personality, that have a greater

impact on teaching methodology and style than the change in policy. The respondent perceives herself to be independent and enjoys the practice of being autonomous in her classroom. From the perspective of the respondent making her own decisions on how to run her classroom and the teaching methodologies she implements, it is easy to understand why she might regard policy change as an intrusion. She also relies on her experience to guide her teaching methodology and believes that this gives her a better feel for, and understanding of, what learners need. The respondent bases this on the success of her learners as they progress through the schooling system. Thus she regards this as a better and more practical measure than that which policy makers develop in the form of curriculum statements, as they have no frame of reference to make practical decisions about what will and will not work in a classroom. It is as a result of these factors, that the respondent views the policy change on the level of teaching methodology as an intrusion and frustrating.

The second sub-question guiding the study asks the question: In what way does teaching methodology guide or govern assessment practices in the classroom? For this question to be answered, an initial understanding of the respondent's understanding of teaching methodology had to be gained. This was achieved by having the respondent define teaching methodology as well as elaborate on the factors that impact on teaching methodology. Furthermore, the study investigated the respondent's views on assessment and the associated practices. Only once this had been achieved could a correlation be drawn between teaching methodology and assessment practice. It is clear, from the data, that in instances where the respondent sees the educational value in aspects of the new curriculum, implementation takes place. This is evident in her use of outcomes in lesson presentation and her assessment practices. Her view is that this benefits learners as learning and assessment become clearer for them. While it may seem contradictory that the respondent feels that there has not been a significant change to her teaching methodology and yet she is teaching towards outcomes; this is due to her understanding that she has already

Research Results and Analysis

been teaching towards outcomes, but was not making them explicit. A conclusion that can be drawn, once again, is that where aspects of the curriculum have a practical value, the respondent implements them, but not only as a result of these aspects being policy. Furthermore, we can observe that the educator's teaching methodology has shifted in relation to making the teaching towards outcomes more explicit. The respondent also clarifies, particularly in relation to the use of an assessment rubric that her assessment practices have changed by incorporating explicit outcomes. From these statements, the study can conclude that the type of teaching methodology employed by the respondent guides her assessment practices.

Further factors that the respondent identifies as having an impact on implementation of policy are the environment and the role of the educator. The respondent views the environment as playing a part in determining how, and to what extent, implementation takes place. This observation is made in the light of the different expectation of Independent and Government schools for implementation. In relation to the impact of environment on teaching methodology, the respondent concludes that environment plays more of a role in influencing teaching style. From this observation, allied to conclusions drawn previously, we can conclude, from the respondent's observations, that teaching methodology is determined and influenced by experience while teaching style is influenced by less fixed variables. From the data, we can also conclude that the role of the educator is determined by the perception and understanding of the respondent. The perceived role of the educator is therefore the lens through which the respondent sees a change in curriculum policy, which has a direct impact on how policy is implemented.

The final sub-question asks the following question: To what extent does assessment methodology influence the outcome of learning? The conclusions drawn by the respondent, in relation to her perceptions of learning, knowledge, skills and the learning process, indicate an OBE methodology. Her

understanding, that these components of education are interrelated as a process and that the educator and learners have a role to play in this process, relates to the Constructivist paradigm underpinning her understanding and perception of the educational process. The respondent also indicates, through her understanding of the role that outcomes play in the learning process, that outcomes come from outside the learner, and in this way, also relates to the Behaviourist paradigm and her conceptualisation of the educational process. As the Constructivist paradigm underpins the RNCS and much of the literature relating to OBE, in particular that of Spady, relates to Behaviourism; we can conclude that the respondent's perception and understanding of curriculum and assessment tie in to the same concepts and, for this reason, there is a correlation between the educational process in which she engages and that of the RNCS.

By considering the respondent's perception of the need for different types of assessment conducted at different times; the role of assessment as being a process as well as the need for assessment to work towards clarified outcomes; we can determine that an outcomes-methodology is being applied to assessment by the respondent. Furthermore we can substantiate the observation made in the opening paragraph of the conclusion that teaching towards outcomes has certainly shaped the respondent's assessment practices. This may not be as a result of a significant shift in teaching methodology; however, the two are tenuously linked through a change in curriculum policy. By implementing an outcomes-based methodology to assessment, the process of learning is certainly altered. This too has an impact on the outcome of learning as the use of different assessment strategies requires learners to employ different skills, thereby contributing to the outcome of learning.

Finally, we can assert that, from the perspective of the respondent, there has been a tension between the implementation of a change in policy and practice because of factors such as the imperative driving change; ineffectual roll-out and

Research Results and Analysis

poor training. Having given consideration to the other variables that contribute to the educational process, we can draw the following conclusion: Despite these flaws in implementation and the respondent's lack of trust in the policy, she has affected a more explicit approach of teaching towards outcomes, which has in turn affected her assessment practices for the better.

These conclusions should be considered in the light of the limitations of the study, as expressed in section 1.8, as they represent the perceptions, understanding and experience of a single-respondent case study.

CHAPTER FIVE

5 Summary of the Main Findings, Recommendations and Implications of the Study

5.1 Synopsis of Results

The final chapter draws together the research question, the research process as well as the results, conclusions and recommendations that emerge from the study. A summary of the report is presented in section 5.2 followed by a discussion of the research and its results in 5.3. The chapter concludes with recommendations for policy and practice as well as for further research and development work. A synopsis of the results, in response to the main research question, is presented prior to the summary.

The intention of the study was to gain insight and understanding into the effects that a theoretical shift in educational philosophy, and therefore policy, can have on teaching methodology and the resultant practice of classroom assessment in a Language, Literacy and Communication classroom – Home Language. The research question guiding the study was:

How has the policy of teaching towards the achievement of outcomes affected the practice of assessment in Language, Literacy and Communication at the General Education and Training Phase?

The following sub-questions were used to supplement and guide the research question:

Research Results and Analysis

1. Does a change in curriculum policy necessarily affect a change in teaching methodology?
2. In what way does teaching methodology guide or govern assessment practices in the classroom?
3. To what extent does assessment methodology influence the outcome of learning?

The conclusion drawn from the data indicates that the change in curriculum policy did not notably alter the respondent's teaching methodology. From the data analysis, it is clear that a number of variables contribute to this lack of change. Section 4.2.3.1 introduces the political imperative driving curriculum change as having had a negative impact on the respondent's view of the changed curriculum. The respondent further substantiates this perspective by reinforcing the point that effective methodological change takes place, not on paper, but through experience and effective training. The ineffectual training initially provided for educators, as suggested by the respondent, resulted in a negative response to implementation. The respondent identifies variables in section 4.2.3.2, such as: the environment in which teaching takes place; the educator's personality and teaching experience as well as the educator's perception of the role of the educator as having far more of an impact on determining teaching methodology than does a change in curriculum policy.

Section 4.2.3.3 links the assertions made in section 4.2.3.1 and 4.2.3.2 about the variables that impact on teaching methodology with the educator's perception and understanding of teaching methodology and style. It becomes clear that the respondent's teaching methodology is underpinned by her role as an educator who facilitates the acquisition of knowledge. The respondent's methodology balances a teacher centered approach with a learner centered approach and considers the necessary knowledge and skills required by learners. The respondent concludes that given the nature of English as a subject as well as the methodology that she had developed due to experience, she had already been

teaching towards outcomes. However, as a result of outcomes being made more explicit in the curriculum statements, the respondent has made the outcomes that she teaches towards more explicit.

She indicates that teaching methodology contributes to assessment practice in that it provides the framework for assessment to be more defined and focused. As the respondent's teaching methodology has clarified outcomes, so too have her assessment practices. The respondent identifies assessment as part of the learning process, and as a result of this, her teaching methodology reflects the process of teaching towards outcomes that are assessed during this learning process. Section 4.2.3.5 highlights the respondent's understanding that assessment forms part of the learning process as it is an interaction between the educator and learner. This is emphasised further in the respondent's discussion of her use of different types of assessment as well as her understanding of the role of assessment. It is also evident from the data analysis that teaching methodology and assessment, in the instance of the respondent's teaching process, are linked and can be seen as aspects of the learning process.

The respondent does not clarify to what extent assessment methodology influences the outcome of learning; however, she does indicate the impact of assessment on the learning process. As a result of teaching and assessing towards outcomes, the learning process becomes more transparent, accessible and focused for learners. She concludes that learners have a better understanding of what they are working towards and what is expected of them. The learning process is therefore facilitated by teaching towards and assessing outcomes as this empowers learners and facilitates the learning process.

While curriculum reform in the form of policy has not had a notable impact on the respondent's teaching methodology, it has clarified the role of outcomes. The respondent uses outcomes more explicitly in the teaching and learning process as a result of the change in curriculum policy. The respondent asserts that the

Research Results and Analysis

methodology of teaching towards outcomes has influenced her assessment practices. In this regard, outcomes are used to guide the assessment process making it more focused and transparent for the learners. The conclusion can be drawn that teaching more explicitly towards outcomes has influenced the respondent's assessment practices, thus impacting on the learning process.

5.2 Summary of the Research

Curriculum reform in South Africa has had a dramatic impact on education; teaching, learning and assessment (see Chapter 2). Literature has been written pertaining to implementation and the successes and failures thereof. Philosophical discussions exploring the reasons for the successes and failures have been conducted and arguments, for why OBE should stay, alternatively, why it should go, have engaged researchers. This study is an attempt to hear the voice of the educator. To listen to her experiences, perceptions and understanding of curriculum reform and to describe how this reform has impacted on her teaching methodology and assessment practice (see section 1.4). In so doing, the intention of the study was to elucidate why tensions exist between policy and practice. In order to achieve this research outcome, two aspects of OBE were considered, namely outcomes and assessment. These were considered within the context of the respondent's understanding, perception and experience of implementing the RNCS. In so doing the research falls within the paradigm of policy-orientated research (Nisbet, 2000). Furthermore, the respondent's understanding of learning and knowledge; teaching methodology and practice as well as her conception of assessment were explored.

Literature relating to policy and curriculum change in South Africa, as well as the implementation of OBE, was first reviewed to identify common concerns relating to implementation. In addition, the literature was reviewed to identify areas in which research could contribute further insight and understanding into the impact of curriculum policy change on teaching and assessment practice (see section

2.3.3). Arising from the literature were aspects relating to curriculum, teaching towards outcomes, teaching methodology and practice, knowledge and learning as well as assessment, methodology and practice. Once these aspects had been identified, the study was located in an “input-output” (Keeves & Adams, 2000:35) framework, which clarified the interrelationships that exist in an educational system. Given that the aspects identified relate to the “process” element of the system, the conceptual framework of Shavelson and Taylor (1999) was selected to guide the case study as explained in section 1.4.1.

As indicated in section 3.3, this research is located within the social sciences by virtue of the study being educational research. As mentioned, the study seeks to identify and describe the “social reality” created by the respondent. The study therefore emphasises the social reality experienced by the respondent when creating and modifying her world and, as a result, the study is located in the Interpretive paradigm (Cohen et al., 2000:22). Given that the intention of the study was to understand rather than generalize (Creswell, 1998), the design selected was that of a case study. As indicated in section 3.2, the case presented in the study is regarded as a “bounded system” (Creswell, 1998) operating within a specified context over a particular time period. The case itself is of secondary interest, facilitating our understanding of the impact of policy on teaching towards outcomes and the practice of assessment. For these reasons, we refer to the case as an instrumental case study (Stake, 2000 in section 3.2.2).

The respondent was selected as the case study for this research as a result of her experience having taught pre and post OBE implementation. Her experience has also been in both Government and Independent schools, giving her a varied experience from which to draw comparison and contrast. The respondent is currently teaching LLC 1: English at the Grade 9 level where the impact of curriculum reform is being experienced most as a result of Grade 9 being a possible exit point in secondary education. Furthermore, the impact of assessment relating to curriculum change has been experienced most at the

Research Results and Analysis

Grade 9 level because externally determined assessment tasks, as well as portfolios have been implemented. The intention of using the respondent as a case study was to gain understanding of an individual's experiences and describe them in such a way as to draw conclusions regarding the research question.

The study was conducted at an Independent school with the respondent and three learners who were in her Grade 9 English class. A qualitative approach was applied during the developmental process of the study, as well as when the study was implemented, (see section 3.4) as the intention of the study was to explore and describe, rather than hypothesise. Data collection included: an initial questionnaire, interviews and preliminary document analysis, which were conducted in 2004; and the final interviews as well as the observation and learner interviews, which were conducted in 2006. In total, one questionnaire, four interviews and three observations were conducted with the respondent. Each learner who participated in the study was interviewed once in order to triangulate the data gathered from the questionnaire, interviews, observation and data analysis. Categorical aggregation and description were used to analyse the data. Chapter 4 presents the categories and data sets along with a rich description. Conclusions were then drawn from these descriptions.

The single-respondent case study proved to be a successful research design for the purposes of this study as it facilitated the exploration and description of a unique case (Yin, 1994). Furthermore, the single-respondent case study allowed for the description of subtleties in the data that did not have to be omitted because of the need for generalization. The analysis of data in Chapter 4 revealed a number of variables that influenced the respondent's perception and understanding of curriculum reform in terms of C2005 and the RNCS. These variables indicated that the political, not educational, imperatives underpinning reform played a role in the respondent's view that reform, while bringing some positive change also lacked clarity, focus and to some extent purpose (section

4.2.3.1). It was concluded that policy change should have been facilitated through better management of role-out by considering the impact of change on educators; better training as well as the impact change would have on the planning of lessons and time as a factor in the practice of teaching. Further investigation revealed variables that impact on methodology such as experience, personality and the way in which educators view their role (section 4.2.3.2). A description of how teaching methodology and style were impacted on by an OBE methodology followed, revealing how the previously mentioned variables influenced the respondent (section 4.2.3.3). Variables such as the learning process, knowledge and skills, formed a link between methodology and style and the description of assessment and the variables governing the practice thereof. My conclusion, from this study, is that a single-respondent case study can give voice to the underlying tensions and frustrations experienced by educators when curriculum reform occurs. By unpacking the causes and understanding the variables that impact on educators, policy makers can better understand the practice of teaching and effect change in a more realistic and practical manner. The conclusions from this section will be discussed and reflected on in the following section.

5.3 Discussion

The previous sections presented a synopsis of the results with regard to the research question and the three sub-questions and provided a summary of the research. This section reflects on the study as a whole by discussing the processes and the research outcomes. Section 5.3.1 reflects on the methodological aspects of the study by considering the extent to which the research design influences and allows for data analysis to address the nuances and perspectives of the study. Section 5.3.2 examines and compares the results of this study with other research in this area. Section 5.3.3 concludes this section with a scientific reflection on the contribution this study makes to policy-

Research Results and Analysis

orientated research and what has been learnt with regard to the impact of policy change on assessment practices.

5.3.1 Methodological Reflection

The research approach used in this study was that of an *instrumental case study*. The study included one respondent, and for the purposes of this report, was referred to as a *single-respondent case study*. One respondent was selected to explore and describe the experience of an educator to explore how the changed curriculum policies, and in particular teaching towards outcomes, influence teaching methodology and, in turn, assessment practices. Given that the research paradigm used in the study was Interpretive, the study was concerned with the individual in an attempt to understand her “subjective human experience” (Cohen et al., 2000). As a result, the conclusions that emerge from the study cannot be generalized (see section 3.4).

The conceptual framework of an input-process-output model guided this study in relation to the research question, which focused the research on the impact of policy (input) on teaching towards outcomes and the practice of assessment (the process of teaching and assessment), as discussed in section 3.2.3 Constructivism as a paradigm is seen, in the light of this study, as key to the curriculum reform that has occurred in South Africa. Furthermore, Constructivism is related to the practice of an OBE methodology as implicit in the RNCS because the new curriculum regards knowledge to be constructed through authentic learning experiences; diverse learning experiences and a high degree of critical thinking (see section 3.3.3). In addition, Behaviourism as a paradigm was used in the study to guide the perception of outcomes as behaviour that comes from outside; the outcome being a demonstration of performance (see section 3.3.4).

The researcher used the conceptual framework as well as the Constructivist and Behaviourist paradigms to explore and describe the respondent's understanding, perception and experience of curriculum reform as well as teaching towards outcomes and their effect on assessment practice. In addition, the researcher used the conceptual framework as well as the Constructivist and Behaviourist paradigms to guide the development of initial questionnaires and interview schedules. The literature review assisted in focusing areas within the research that required further investigation from the perspective of an individual's experience. Once the initial questionnaires and interviews had been conducted, further reading was required to delve more deeply into policy change and assessment methodology to hone the researcher's understanding of these areas so that the second round of interviews could focus, more effectively, on teaching and assessment methodology and practice.

A further methodological reflection relates to the relationship that exists between the research design of the case study and the qualitative measurement thereof. Careful attention had to be given to describing and explaining the respondent's experiences, understanding and perception of curriculum reform, and the resultant teaching and assessment methodologies and practices, while attempting to interpret how and why the respondent perceives and understands them in the way that she does. While the research methodology seeks to understand, interpret and make meaning from the data that has been gathered, one must remain cognisant of the limitations of the study. These limitations exist in relation to the subjectivity of research based on one respondent along with the subjective nature of the meaning derived from the data by the researcher (see section 1.8).

5.3.2 Substantive Reflection

The results of the study indicated that a number of variables impacted on the respondent's perception, understanding and experience of curriculum reform, as

Research Results and Analysis

well as her subsequent teaching methodology and assessment practices. The variables identified suggested interrelationships, which were used to categorise data as data sets and, on further analysis, revealed links between the data sets. The original literature review provided the framework for the conceptualization of the study (see Chapter 2) and the development of instruments used to implement the study. Additional literature was reviewed to clarify issues surrounding the policy implementation and assessment methodology and practice that arose as the data was analysed and described, and conclusions were drawn.

Further reading of the literature indicated instances of research where Jansen, 2001; Rensburg, 2001 and Christie, 1999, questioned the growing distance between policy and practice. They expressed concerns over policy change being symbolic and discussed implications for policy change as a result of political investment in policy change. These questions addressed the question of curriculum reform from a philosophical, historical and pragmatic perspective while the intention of this study was to use these views as a framework for the investigation. The voice of the respondent, in the form of this report, would clarify from a perspective of experience, issues relating to curriculum reform, teaching and assessment methodology.

A discussion of educational reform and implications for implementation in the context of a debate around nomenclature and the variety of language surrounding terms such as: outcomes, skills, learning and performance by Ian Bellis (1999: 220), identifies a number of concerns experienced by the respondent. Bellis's observations relate to those made by the respondent considering imperatives for changes and the way in which curriculum change and the language used to articulate it lacks certainty and definition. He observation that,

In most instances of human life, policies and processes, systems and structures, activities and behaviours are largely determined by the meaning given to central concepts and issues, whether consciously articulated or not.

This reinforces the conclusions drawn from the data in which the respondent has created her own meaning around curriculum reform. Although she does not articulate them, the impact is certainly visible in her teaching and assessment methodologies. Meaning is created in terms of her understanding and experience of curriculum reform as well as in the light of the RNCS and terminology contained therein, such as outcomes, assessment, knowledge and skills. This observation elucidates why the respondent demonstrates certain behaviours as a result of curriculum reform in relation to her teaching methodology, which has not changed as a result of curriculum reform, and her assessment practice. As indicated in the quotation, she has probably never consciously articulated these thoughts, however, the meaning that she has assigned to curriculum reform and teaching towards outcomes has impacted on her assessment practices.

Finally, assessment in the context of the language classroom was revisited in the light of the data. The literature highlighted what was observed by the respondent in relation to language learning. The focus is on authentic scenarios that develop skills that require greater input from the learner and offer opportunities to apply language acquired in real-life scenarios (Potgieter & du Toit, 2004). Furthermore, the literature reiterates the respondent's understanding of the role of assessment as ongoing and part of the learning process, not just something that takes place at the end of the learning process (Potgieter & du Toit, 2004).

As a result of the study using a qualitative approach to understanding and describing the case as it unfolded, iterations in the data required further research to examine what was emerging in relation to previous studies. The reading assisted in guiding the interpretation of, and conclusions drawn from, the data in the light of the research question.

5.3.3 Scientific Reflection

Section 5.3.1 reflected on the use of the single-respondent case study as the research design for this study. In making use of this design characteristic, the report is able to address what it sought to achieve: exploring and describing the experience of an educator. Through this research design and the qualitative methodology, a personal account of experience, understanding and perception is outlined in relation to teaching towards outcomes and the resultant assessment practices.

While the design of a single-respondent case study has its limitations, in that it is limited to the experience of one individual in a unique setting and context, it addresses the thoughts, feelings and experiences of an individual as opposed to a pragmatic, philosophical or historical discussion or analysis. In so doing the study is able to identify variables that an educator has identified as playing a role in determining her teaching and assessment methodology in relation to curriculum reform. This report, therefore, provides evidence that is not based on hypothesis or the development of theory, but rather is an account of the tensions that emerge when policy impacts on the practice of an individual.

Furthermore, the report addresses the impact of curriculum reform on teaching methodology in relation to teaching towards outcomes and assessment practices. The study identifies that variables do not operate in isolation, but interact as part of the educational process. In so doing the study identifies the need in policy-orientated research to consider the relationship of variables in order to gain a holistic understanding of the educational process as multifaceted and dynamic.

5.4 Recommendations

This final section of the report presents recommendations that could be considered for policy and practice, relating to how curriculum policy impacts on practice, particularly in relation to teaching methodology and assessment.

5.4.1 Policy and Practice

Recommendations for Policy Development and Policy Implementation

Currently, policy for teaching towards outcomes and the requirements for assessment practice are documented in the RNCS and the National Protocol for Assessment. Educators are expected to attend training courses in order to become qualified assessors. As yet, no intervention has been developed to realign educators with the goals and intentions of the RNCS from an educational perspective. While educators are being trained to be qualified “assessors”, no real clarity has been provided to develop a practicable reporting tool that guides educators on how to develop assessment tools to report in a practical and realistic manner. Should this limitation not be addressed, the delivery of the RNCS will continue with a sound understanding of the expectations of an OBE teaching methodology. However, the measurement of the outcome of the RNCS and OBE will remain flawed as assessment and reporting, in terms of OBE, will not have been addressed. If this is the case, educators will continue questioning the validity of the revised curriculum policy as uncertainty will remain with regard to how final reporting on outcomes takes place.

Recommendations for Curriculum Developers

The DoE have been running a series of televised broadcasts, which inform the public and educators about the National Senior Certificate that has been launched in Grade 10 this year. This type of intervention for the GET, re-examining the imperative behind the RNCS from an educational perspective, may encourage educators to be more open to developing their teaching methodology and style along OBE lines. In so doing, the perception of policy by educators could become more positive and be seen as having a positive effect. Furthermore, by revisiting and clearly defining terminology such as teaching, learning, knowledge, skills and assessment, as used in the RNCS, educators may come to a clearer and more consistent understanding of the terminology of OBE. If this were the case, perhaps a change in teaching methodology and style could be effected and more effective implementation of the RNCS would take place.

Finally, training broadcasts could be run to better equip educators as assessors. Firstly, this would develop their understanding of what assessment is by identifying the correct vocabulary and secondly, it would consider the role of assessment and therefore the relevant methodology. A system of assessment that assesses not only towards outcomes, but which can be used to report in a practical and meaningful way needs to be developed. It is essential that assessment is reported on so that it can be interpreted by learners and parents and be seen to be relevant and meaningful. Finally, a broadcast dealing with assessment, as referred to above, would draw together an understanding by educators of how policy and teaching towards outcomes is integral to the assessment process.

In order for effective implementation of curriculum to take place, educators need to understand and “buy into” the imperatives driving the change. Given the

historical context of the implementation of curriculum policy in South Africa (see sections 1.2.1 and 2.2.1), educators need to be realigned with the RNCS. If this does not take place, implementation of the curriculum will be ineffective (see section 2.3.1). Furthermore, it is all very well to train educators to be assessors, however, if there is not a practical and realistic protocol for assessing towards, and reporting on outcomes, the entire premise for the curriculum will flounder (see section 2.3.2).

Recommendations for Schools

For educators to be empowered, it is imperative for schools to ensure that their educators are kept up to date with changes and developments in curriculum policy. Schools should designate an educator who could receive circulars from the DoE, and the IEB and ISASA in the instance of Independent schools, and ensure that they are disseminated to the relevant educators. Schools should ensure that educators attend necessary training courses as well as run their own in-house courses to discuss and examine issues surrounding curriculum implementation within the school context. The management of schools should support and encourage the implementation of OBE teaching methodologies and put in place systems to ensure educators are making use of these methodologies. Schools should also ensure that they implement an assessment policy that is conversant with the National Protocol for Assessment, to ensure that educators are marrying OBE methodologies with sound OBA methodologies.

5.4.2 Further Research and Developmental Work

From the results of this report, variables, which impact on the reception of policy and the subsequent willingness to implement policy change, can be identified. Politicians and policy developers can take note of these when considering further curriculum reform and be guided as to how educators view the impact of change.

Research Results and Analysis

In addition, cognisance can be taken of the realities of teaching practice, as indicated in this report (see Chapter 4), when considering reform and the practical implications it will have for educators. Tertiary institutions training educators can reconsider the courses they offer in terms of teaching methodology in the light of OBE and evaluate whether or not these are implemented within an OBE framework from which student educators can learn. Finally, teacher training courses should consider their assessment courses and ensure that they are aligned with the principles of OBE as well as provide educators with the ability to assess and report on outcomes in a practical and meaningful way. Should these recommendations be considered, experienced and novice educators will have been given the opportunity to have a consistent outlook on teaching methodology in relation to outcomes and assessment practices.

Future research could consider developmental training that is offered to, and expected of educators, and link this to policy expectations. By researching what is required by curriculum policy and linking this to the training of educators, research could facilitate a link between policy and training. In so doing, a better understanding of policy and practice could be generated, leading to more effective delivery of curriculum.

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APPENDIX A – Ethical Considerations

- Ethical Clearance Certificate
- Letter to parents/Guardians

Ethical Clearance Certificate

Letter to parents/guardians

24 July 2006

Dear Mr and Mrs

I am currently completing my Masters degree in Assessment and Quality Assurance at the University of Pretoria. My research is based on a case study investigating the influence of Outcomes Based Education on the assessment practices in an English First Language classroom. I have been working with Mrs Dodson as part of my research to gather data and in order to complete a further aspect of the research, need to interview some of the learners in her English class.

A sample of four learners will be interviewed for approximately 20 minutes. The interview will focus on their perceptions of teaching, learning and assessment. The research is purely for use in my Masters Dissertation and bears no relation to the school or to the work currently being covered in English. Learners will remain anonymous and will have access to the Masters study. A date for the interview will be agreed upon with your child should you give permission for them to participate in the study.

Please will you complete the attached form and return it via your child, to me, as soon as possible. Thank you for your cooperation in this regard.

Yours sincerely

APPENDIX B – Observations

- Observation – 25 July 2006
- Observation – 15 September 2006
- Observation – 19 September 2006

Observation – 25 July

Lesson Topic: Marking of a Comprehension Test

Educator's Interactions	Learners' Interactions	Researcher's Observations
<ul style="list-style-type: none"> ➤ The lesson begins with the educator explaining what will take place during the lesson. ➤ She explains what the outcome of the lesson will be. ➤ She explains that learners will be marking each other's tests. ➤ The educator explains her expectations for the lesson. ➤ The educator explains the first answer. ➤ The educator senses that there is not clarity on what an adjective is so goes back to provide a definition. ➤ The educator also explains the rules governing the adjective. ➤ When a learner provides an answer that is not quite correct the educator extracts that which is and then asks for another learner to provide an answer for the rest. ➤ At times the educator refers a question to the class as a whole; some questions are directed at an individual and on other occasions learners volunteer answers. ➤ The educator contextualizes the need to know information such as definitions of parts of speech as well as the skill of answering questions effectively in terms of the 	<ul style="list-style-type: none"> ➤ The learners enter the class chatting to one another; they move to their desks and wait to be greeted. ➤ Learners respond immediately by writing their name on the script they receive. ➤ A learner provides an alternative; the educator explains why the answer is not correct. ➤ The learners and tell each other to keep quiet when someone talks out of turn. ➤ On occasion, the learners disagree about an answer. The educator mediates the discussion by allowing it to take place and then interjecting with more questions to provoke thought. This continues until the learners reach consensus on an answer. ➤ On occasion, learners correct one another when answering. ➤ When learners return tests to each other they interact and comment on good marks. ➤ Learners are told to check the marking and challenge if they think there is a mistake. A couple of learners approach the teacher and ask for clarification on 	<ul style="list-style-type: none"> ➤ There is a relaxed and friendly atmosphere as the learners enter the class chatting to each other as well as the educator. ➤ The educator clearly emphasizes accountability and responsibility in the learners when they mark the tests – each learner must sign their name on the test that they are marking. ➤ Educator is clearly not only interested in the lesson, but also focuses on underlying knowledge and skill. ➤ The educator draws on previous knowledge by using vocabulary such as, "remember". ➤ The educator provides positive reinforcement for learners even when they do not answer correctly. ➤ The educator uses different strategies to extract an answer from the learners. ➤ Throughout the lesson, learners are focused on the task at hand – few are distracted. ➤ Educator focuses on knowledge, interpretation and skills during the lesson. ➤ The educator has a good rapport with the learners

<p>examination.</p> <ul style="list-style-type: none"> ➤ The educator focuses on the transfer of knowledge into a skill in terms of a question asking for another example of an adjective and learners needing the required knowledge to know what an adjective is and then the skill of providing one. ➤ Educator reinforces the need for learners to go back to the text when answering questions. ➤ When going through the questions; the educator provides a definition to a part of speech then asks the learners to apply that knowledge to the question. ➤ Educator always explains carefully why an answer was incorrect. ➤ The educator reinforces effective answers with, “lovely”. ➤ The educator does not only focus on the answer to the question, but also the skill of answering effectively through the skill of analyzing the question. ➤ The educator always listens to a variety of answers before summing up for the learners. ➤ The educator collects the tests and explains that the marks will count towards the CASS mark. ➤ Learners are greeted and leave the class. 	<p>some of the marking.</p>	<p>which is evidenced from her telling a personal anecdote.</p> <ul style="list-style-type: none"> ➤ The learners feel confident/empowered in the environment as they challenge the educator on an answer. ➤ The educator is clearly comfortable with the class as she uses humour through the way she reads the passage to emphasize a point. ➤ The educator always contextualizes examples. ➤ The educator gives learners the space to explore their own answers in terms of whether it is correct or incorrect and why. ➤ The test requires the ability to analyze, interrogate, know and apply. ➤ The educator frequently links answers to other skills such as the use of punctuation. ➤ The learners were engaged in the lesson. Many questions were asked and learners seemed genuinely interested in the class.
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Observation – 15 September

Lesson Topic: Literature – short story. The Haji

Educator's Interactions	Learners' Interactions	Researcher's Observations
<ul style="list-style-type: none"> ➤ Educator greets the learners and asks them to sit down. ➤ Educator asks the learners to take out their homework. ➤ Educator walks around the class checking to see who has or has not done their homework. ➤ Defaults are handed to learners who have not done their homework. ➤ Having checked the homework the educator moves to the front of the class and begins marking the homework. ➤ At the start of the lesson the educator reminds the learners of the importance of the notes that they have made as being the notes that they will be using to study for their exams at the end of the term. ➤ On occasion the educator will ask a learner to clarify answers and provide further explanations. ➤ Once a learner has answered a question and other learners have been given an opportunity to give their answers, the educator further expands the answer. ➤ When a learner is unable to answer the educator gives them clues to guide their answer and helps them attempt the question. ➤ Educator reads the body language of the learners 	<ul style="list-style-type: none"> ➤ Learners volunteer to answer questions. ➤ Learners clarify their answers by providing examples ➤ Learners ask questions of the educator when they feel there may be an additional point and they ask for clarity. ➤ A learner asks what "dithering" means – the educator asks "what do you think?" She then contextualizes by giving an example of trying to select something from a menu. Other learners then offer their opinion about what the word means. ➤ Learners mark their work and while the questions are being answered – they add additional information. ➤ Learners don't just explore the facts the educator allows them to answer in terms of an emotional response too. ➤ Bell rings – educator says "just listen" and quotes from the story. The learners sit quietly and write down the quote. ➤ The learners stand the educator waits for them to settle and then dismisses them. ➤ Learners leave chatting and laughing with one another. 	<ul style="list-style-type: none"> ➤ Learners arrive at class on time and enter talking to one another. ➤ Once they are at their desks their talking becomes less and quieter as they wait to be greeted. ➤ Their greeting is warm and enthusiastic. ➤ Once they sit down they are quiet as the educator goes around checking their work. ➤ Learners chat to the educator as she goes around the class checking their work. ➤ The educator seems to have an open, friendly relationship with the class. ➤ Learners who have not completed their homework are apologetic and none challenge the educator – there seems to be a respect for the educator. ➤ The educator does not only use the lesson to discuss the current text, she also makes reference to the exam and the importance of the notes as well as answering techniques. Her focus is broader than just the lesson at hand. ➤ Throughout the lesson the educator draws on other areas of the Learning Area such as vocabulary and parts of speech. Integrating the literature lesson with the language component.

<p>“Megan you have something to say I can see it.”</p> <ul style="list-style-type: none"> ➤ Educator highlights the need for quoting when answering literature questions as an important skill. ➤ Educator moves onto the next concept and indicates that one of the learners suggested that two of the themes - pride and stubbornness - are linked ➤ The educator asks a learner who has not been contributing to start the discussion off. ➤ Educator says, “I like that” “elaborate” – when a learner introduces a complex point that has not yet been explored. It is an issue that deals with morality and religion. “Yes I see what you are saying here.” ➤ Educator says, “are you speaking from experience Megan” when a learner gives her perspective on why people are stubborn. ➤ Educator reminds learners of projects and that they should be working on them. 		<ul style="list-style-type: none"> ➤ The educator draws in other elements of the text such as chauvinism when discussing pride – linking themes in the text. ➤ The educator’s body language is expressive – when learners make statements, she nods her head. ➤ Educator makes use of “good”, “correct” “exactly” and “fabulous” when the correct answer is given. ➤ The educator refers to skills on a number of occasions during the lesson. ➤ Educator jokes with learners who enjoy vocabulary and tells them they will like the word “dithering”. ➤ If learners struggle with a concept or vocabulary, the educator often re-contextualizes in a more familiar scenario to facilitate understanding. ➤ Educator refers to previous answers given by learners linking ideas. ➤ The educator reaffirms learners and allows them space to explore ideas. ➤ There is a friendly rapport between the educator and the learners – the learners demonstrate a healthy respect too.
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Observation – 19 September

Lesson Topic: Literature – short story. The Haji

Educator's Interactions	Learners' Interactions	Researcher's Observations
<ul style="list-style-type: none"> ➤ The educator explains the requirements of the task reminding learners about the rubric they have to help guide them in the process. ➤ The educator addresses all of the questions and then moves on to the literature. ➤ The educator makes a statement about the literature and asks a learner about their opinion – what they think about what she has just said. ➤ The educator introduces sexism and discusses this in relation to irony. ➤ The educator asks the class how you should answer a question relating to irony and the learners are able to explain that you need to talk about opposites ➤ The educator makes a joke about the irony in her tone when discussing sexism and the learners laugh. ➤ The educator addresses religion in the text in relation to action and belief. ➤ Educator discusses a sub theme by first identifying what a sub theme is. This she does by questioning the learners. ➤ Educator discusses Apartheid outside the context of the story asking 	<ul style="list-style-type: none"> ➤ Learners enter the class and greet the educator as they enter asking her how she is. ➤ A learner raises their hand and asks a question about a project that they have to submit. ➤ A number of other learners ask questions relating to the project. ➤ The educator asks a specific learner a question. The learner has not been listening and is unable to follow the instruction. ➤ The educator asks the learner why she asked them the question. ➤ The learner explains that it was probably because he was not listening. ➤ A learner answers a question by volunteering their answer. ➤ The educator responds by saying, “you are right, but what is wrong with that answer”. ➤ The learner indicates that it is too short and superficial and the educator agrees. ➤ The class interacts in a discussion relating to religion, values, race and the difficulties resulting in marriage across culture. Learners offer their own 	<ul style="list-style-type: none"> ➤ The educator greets the learners and chats to them while they wait for the rest of the class to arrive. ➤ The lesson begins with educator greeting the learners and asking them to take out their Literature notes. ➤ The educator is not only concerned with what the learners are able to deduce from the text, but also from their own experience and opinion. ➤ The educator reasons with learners in terms of their role in the classroom. She requires them to articulate about the requirements of their own behaviour. ➤ The educator not only focuses on the themes being discussed, but also on the skill of answering a certain type of question. ➤ The educator focuses on knowledge of the text, understanding of themes and the skill of answering questions. The educator also addresses the values and attitudes of the learners when addressing themes such as sexism, pride and religion. ➤ The educator probes

<p>learners their opinion of separation and segregation. Educator brings up the concept of justice.</p> <ul style="list-style-type: none"> ➤ One learner raises a point and another learner disagrees and raises their point of view. ➤ The educator allows them to express their opinions and validates these. ➤ Educator introduces the word impotent in relation to the story. ➤ Asks the learners what it means and in that way develops their vocabulary ➤ The educator moves on from themes to characterization. ➤ Educator links the concept of themes and characterization making use of the word “explore”. ➤ The educator makes a joke about sexism and the learners laugh. ➤ Educator asks for definitions of sexism, asks learners to explore and provide an example from the text. ➤ When a learner raises a point that is contrary to what the educator has been saying, the teacher says, “you raise a valid point”. ➤ The educator then asks the learners to provide examples from the text to support the point that the learner has made. ➤ The educator then asks, “he treats her with what?” – 	<p>opinions as well as examples from their experience.</p> <ul style="list-style-type: none"> ➤ A learner discusses the relationship between sexism and religion in the context of the story as well as by providing an example from his personal experience another learner provides an example from her experience and a short class discussion follows. ➤ The educator and learners explore how and why characters have developed in the way that they have. Learners give their opinions, debating points with each other with the educator mediating what is being said. ➤ A learner raises the ironic humour in the story and the learners laugh about the point that he has raised. ➤ A learner raises the point of freedom of experience, respect of difference ➤ The bell goes for the end of the lesson and learners stand and wait to be greeted before they leave. 	<p>learners for prior knowledge before addressing a current topic. In this way she is able to identify what knowledge the learners already have and what additional information they require.</p> <ul style="list-style-type: none"> ➤ The educator facilitates the learners to develop the skill of critical thought in terms of their answers by questioning what they think about their own answers. ➤ The educator allows learners to have space for their own opinions. ➤ The educator adopts different styles throughout her lesson shifting from her directing the discussion to learner input and direction. ➤ The educator addresses other areas of the learning area such as language by exploring vocabulary. ➤ While the themes that are discussed in the lessons are relatively serious, the educator facilitates the understanding of humour that is also created. This creates an environment that is open and encouraging. ➤ This is also facilitated by the educator sharing personal viewpoints as well as sharing a personal story – this encourages learners to volunteer information as
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<p>Exploring vocabulary</p> <ul style="list-style-type: none">➤ The educator shares a story about a novel that she has read and relates it to the short story that is being dealt with.➤ The educator says, “what I feel and this is my opinion” she then goes on to discuss her opinion of a culture that demeans women.➤ Educator relates a story about a friend who is Jewish who made a decision relating to her clothing etc – the educator discusses how she can respect that kind of choice because it is a choice and it is not enforced.➤ The educator allows people to volunteer information but she also asks specific learners who do not volunteer questions.		<p>well as opinions.</p>
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APPENDIX C – Respondent Questionnaire

- Respondent Questionnaire - Assessment

Assessment and Quality Assurance

OPEN-ENDED QUESTIONNAIRE

General Education and Training Educator (GET)

You have agreed to participate in a case study designed to inform a dissertation as part of a Masters degree in Assessment and Quality Assurance at the University of Pretoria.

Your input in the completion of this questionnaire will provide valuable assistance and contribute to the findings and recommendations regarding how teaching towards outcomes has affected assessment practices in Language, Literacy and Communication in the GET Phase

Your responses are strictly anonymous and you will not be expected to identify yourself.

Please complete this questionnaire as completely and honestly as you can. Thank you for your time and cooperation.

**SECTION A
BACKGROUND TO ASSESSMENT**

Complete the following by answering in the spaces provided.

1. In your opinion, what is the purpose of assessment?

2. Who are the role players in assessment? Please provide reasons for your answer.

3. Who are the stakeholders in assessment? Please provide reasons for your answer.

4. When should assessment be carried out?

5. By whom should assessment be carried out?

SECTION B
ASSESSMENT PRACTICES

Complete the following by answering in the spaces provided.

1. What assessment instruments do you use in your classroom?

2. Are assessment criteria or standards transparent to the learners? Please explain your answer.

3. When are assessment carried out in your classroom?

4. By whom are assessment carried out in your classroom?

5. When and how are learners provided with feedback on their assessments?

Thank you for your time and co-operation

APPENDIX D – Respondent and Learner Interview Schedules

- Respondent Interview Schedule – Background to OBE
- Respondent Interview Schedule – Methodology and Practice
- Respondent Interview Schedule – Assessment Practices
- Respondent Interview Schedule – Assessment implementation and Practices
- Learner Interview Schedule

Interview Schedule Background to and Implementation of OBE

1. General	✓
1.1 Briefly summarise your teaching career: (prompt) Qualifications, where you've taught, duration, positions held, subjects taught	
2. General Understanding and Perception of OBE	✓
2.1 When were you initially exposed to the changes that were going to take place in the curriculum of South African schools?	
2.2 What changes to the curriculum were being suggested?	
2.3 How was the concept of OBE introduced to you?	
2.4 From policy documents/workshops what was your understanding of OBE?	
2.5 How would you say this understanding has changed since you were first exposed to OBE?	
2.6 Is this as a result of practical experience and implementation?	
2.7 Would you say there is a difference between your understanding of OBE and your perception thereof?	
3. Implementation of OBE	✓
3.1 Will you briefly summarise your opinion of C2005	
3.2 and the Revised National Curriculum statements.	
3.3 To what extent have you implemented the new curriculum and its principles of OBE in your teaching practices?	
3.4 Do you believe the new curriculum and its principles of OBE have influenced your teaching practices?	
3.5 Could you elaborate in terms of your preparation/the teaching and learning process ?	
3.6 In your opinion, what does teaching towards outcomes offer that the traditional curriculum did not?	
4. Understanding and Implementation of Outcomes	✓
4.1 What is your understanding of the purpose of outcomes in teaching and learning in the GET Phase?	
4.2 In what way do you incorporate outcomes into your teaching practices?	
4.3 How do you regard the concept of teaching towards outcomes ?	
4.4 Are there characteristics unique to LLC that are specifically affected by assessing towards outcomes?	
5. Summation	✓
5.1 Finally, can you share with me some of the benefits you have experienced in your classroom due to the implementation of the new curriculum and its principles of OBE?	
5.2 and negative experiences?	

Interview Schedule Methodology and Practice

1. Biographical Introduction	✓
1.1 Tell me how you came to be an educator.	
1.2 Who, if anyone, has influenced you as an educator?	
1.3 Tell me about how they influenced you.	
1.4 Could you describe what motivates you as an educator?	
1.5 Are there elements of education that you find exciting?	
1.6 What elements of education do you find frustrating?	
1.7 Has your view of education changed during your years of experience?	
2. Definitions & Perceptions of Learning and Knowledge	✓
2.1 How would you define learning?	
2.2 How does the educator play a role in the learning process?	
2.3 What role does the learner play in the learning process?	
2.4 Tell me about your understanding of the concept of knowledge?	
2.5 Describe for me your understanding of how a person acquires knowledge in the context of secondary education?	
2.6 In the context of the classroom; how are learning and knowledge linked?	
2.7 Could you describe the role of skills in relation to knowledge and learning?	
2.8 To what extent do you think the learning context impacts on the process of learning?	
3. Teaching Methodology and Style	✓
3.1 Tell me about your understanding of what teaching methodology is?	
3.2 Can you explain your understanding of teaching style?	
3.2.1 Would you like to review your definition of teaching methodology?	
3.2.2 How would you differentiate between teaching methodology and style?	
3.3 In your opinion, what determines the teaching methodology teachers implement in their classrooms?	
3.4 How does an educator develop a teaching style?	
3.5 To what extent do you think it is important for educators to understand teaching methodology?	
3.5.1 What relationship do you think there is between the understanding of teaching methodology and the effective delivery of OBE?	
3.6 To what extent do you think an OBE methodology impacts on the Learning Area which you teach?	
3.7 What kind of influence do you think your personality has on your teaching style?	
3.8 LLC1 has a number of areas within the Learning Area. To what extent do you vary your teaching methodology across these areas?	
3.9 Prior to the introduction of OBE and the Revised National Curriculum Statements (RNCS); the syllabus was the NATED 550. What teaching	

methodology did you implement when delivering this syllabus?	
3.10 The RNCS is focused on the acquisition of skills. In what way has your teaching methodology had to change in order to focus on this area?	
3.11 You have taught in both Government and Independent education. Did your teaching methodology or style change when you moved from Government to Independent education?	
3.12 Describe for me the impact of a changed curriculum policy on your practice of teaching?	
4. Implementation of Outcomes in teaching practices	✓
4.1 Explain to me how you have you gone about incorporating outcomes into your teaching practices?	
4.2 What has helped you implement the RNCS and teaching towards outcomes?	
4.3 In what way do you communicate to the learners the outcomes that are being worked towards?	
4.4 Can you describe the way in which teaching towards outcomes impacted on your lesson planning?	
4.5 Tell me about how you might make use of policy documents when designing lesson programmes?	
4.6 Describe for me the element of implementing the RNCS that has had the most impact on you as an educator?	
4.7 How has the RNCS impacted on the learners?	
4.8 Tell me about how your views on teaching towards outcomes may have changed over time.	
5. Summation	✓
5.1 What broader implications for education have you observed with the implementation of the RNCS?	
5.2 Is there anything that you might not have thought about before that occurred to you during the interview?	
5.3 Is there anything you would like to ask me?	

Interview Schedule Assessment Practices

1. General	✓
1.1 Teaching, learning and assessment are 3 key concepts in education. In your opinion, what is the relationship between the 3?	
2. Observations from questionnaire	✓
2.1 I see from your questionnaire that you use a number of different assessment instruments. Can you tell me why that is?	
2.2 When do you make assessment criteria transparent to learners?	
2.3 What do you think about the theory that transparent assessments are an effective educational tool?	
2.4 Are the learners in your class made aware of the outcomes they should be achieving?	
2.5 How are the learners able to see a link between the outcomes they are working towards and the assessment tasks they complete?	
2.6 You involve learners actively in the certain forms of assessment. Can you clarify when you involve learners and why?	
3. Implementation of OBE & its influences on Assessment Practices	✓
3.1 As you've implemented an OBE approach in your classroom, have you seen any changes in your approach to assessment?	
3.2 (If yes) Why do you think that is?	
3.3 How do you think the concept of OBE and teaching towards outcomes is linked to assessment?	
3.4 You've been asked to prepare a module of work on the literature set work for the term. Take me through how you would do this from planning to implementation.	
3.5 How do you aligning teaching towards outcomes with assessment tasks?	
3.6 The grade 9 learners gather work for a portfolio. How do you regard the concept of portfolio work?	
3.7 Has working on portfolios in any way influenced your assessment practices?	
4. Summation	✓
4.1 You have marked CTAs (Common Tasks for Assessment) and moderated portfolios. Have you witnessed a benefit to learners completing these tasks?	
4.2 From marking CTAs and moderating portfolios, have you seen evidence of learners achieving the COs and SOs relevant to LLC	
4.3 How has teaching towards outcomes affected your assessment practices?	

Interview Schedule Assessment Implementation and Practices

1. Definitions and Perceptions of Assessment	✓
Thank you for agreeing to be interviewed for the purposes of a Masters Dissertation. Please remember that for the purposes of this study you will remain anonymous.	
1.1 Tell me about your experience of being involved in assessment as an educator.	
1.2 How would you define assessment?	
1.3 What, in your opinion, is the purpose of assessment?	
1.4 At what point in the learning process do think assessment is required?	
1.5 Describe for me your opinion of the view that assessment is part of the learning process? – Plays a development role in the learning process.	
1.6.1 Do you think that the characteristics of an assessment measuring knowledge have to differ to one measuring skills?	
1.6.2 How would you alter an assessment to measure the acquisition of attainment of skills rather than knowledge?	
1.8 How do you ensure that you assess what has been addressed through the process of teaching and learning?	
2. Methodology	✓
2.1 Tell me what kind of training have you had in relation to the assessment methodology required by the RNCS?	
2.2 In your opinion; has assessment methodology changed from pre to post RNCS implementation?	
2.3 In what way do you think teaching methodology guides assessment practices?	
2.4 We have also discussed teaching styles. In what way do you think your teaching style impacts on your assessment practices?	
2.5 Please run through the different assessment methodologies you make use of in the different areas of LLC1.	
2.6 Why do you make use of different assessment methodologies?	
2.7 Explain to me the extent to which you think the assessment methodology influences the outcome of learning?	
3. Impact of Assessment	
3.1 Can you elaborate on the impact the assessment required by the RNCS has had on documentation, recording and reporting?	
3.2 What kind of impact has the form of assessment required by the RNCS had on you as an educator?	
3.3 To what extent have you observed a shift in the outcome of learning through the implementation of different assessment methods?	
3.4 What impact has the implementation of the RNCS and the associated assessment methods had on learners?	

4. Summation	✓
4.1 What broader implications for assessment have you observed with the implementation of the RNCS?	
4.2 How would you describe the impact of a changed curriculum policy on your practice of assessment?	
4.3 Is there anything you would like to ask me?	

Learner Interview Schedule

1. Biographical Information	✓
1.1 What are your favourite aspects of English?	
1.2 Why are these aspects your favourite parts of English?	
1.3 What aspects of English do you not enjoy?	
1.4 Tell me why you don't enjoy these aspects of English	
2. Assessment	✓
2.1 In English you have different types of assessment. Are these applied to different sections of the English curriculum?	
2.2 When might you write a test?	
2.3 How are those tests marked?	
2.4 What type of assessment do you prefer: a test or a rubric?	
2.5 When might an educator make use of a rubric as a form of assessment?	
2.6 What is your opinion of this form of assessment?	
2.7 When are you given a rubric, prior to or after you have been given a task?	
2.8 Are there assessments in English different to the types of assessment carried out in other Learning Areas?	
3. Outcomes	
3.1 Can you explain what an outcome is?	
3.2 Have you ever been made aware of what the outcomes in English are?	
3.3 Are the outcomes of the lesson made clear to you?	
4. Teaching Styles	✓
4.1 What different methods does your English teacher make use of when teaching the different sections in English?	
4.2 What different ways does your teacher use to convey material to you?	
4.3 How does the way in which you get taught in English differ from other Learning Areas?	
4.4 Do you respond differently to different styles of teaching?	
4.5 Do you prefer one style of teaching to another?	

APPENDIX E – Interview Transcripts

These are stored on the CD attached to this document

- Respondent Interview Transcript – Background to OBE
- Respondent Interview Transcript – Methodology and Practice
- Respondent Interview Transcript – Assessment Practices
- Respondent Interview Transcript – Assessment implementation and Practices
- Learner Interview Transcript - Learner 1
- Learner Interview Transcript - Learner 2
- Learner Interview Transcript - Learner 3