

CHAPTER 1

AN ORIENTATION TO THE PROBLEM IN PRACTICE

1.1 Introduction to the Education System in South Africa

The major political changes of 1994 gave impetus to changes in all sectors of the South African society, particularly education. The greatest challenge this sector of South African society faces, is changing a previously fragmented, inequitable and culturally oppressive system of education into one which will satisfy the requirements of equity, equality, redress and social and cultural empowerment.

Capper and Jamison (1993:427) write that the traditional South African education system at the time was divided, which lead to inequalities in educational standards. The curriculum was geared towards the needs of minorities in many ways.

The black majority was marginalised during the apartheid era and this lead to huge inequalities in educational standards in the country. Added to this, the curriculum catered for the needs of the white population who were in the minority. This subsequently left the black sector of the country underdeveloped (Moodly 1997:99-103; Van Wyk & Mothata 1998:1).

The social-political reform of 1994 subsequently led to educational reform. An outcomes-based approach to education was selected since it is usually attractive to politicians, policymakers and administrators at a time of renewal. According to Van der Horst and McDonald (1997:6) this is typical of a social-reconstructivist view of schooling where education is regarded as a way to change and improve society. Apart from the political debate surrounding the implementation of Outcomes-based Education (OBE), many South Africans are rather negative towards this aspect of renewal. It is therefore necessary to look at the developments.

1.1.1 The Traditional Approach to Education in South Africa

According to Olivier (1998:3), traditional content-based education is mostly content- or skill-driven and teacher-centred. The primary purpose of content-based teaching is

the mastering of knowledge with textbooks and teachers being the main sources of information.

Traditional teaching practices in South Africa, much the same as Spady (1998:4) describes them to have been in the United States of America (USA), were built around timetables and progression or retention rather than guaranteeing learner success. The year was divided into school terms during which specific information was taught in a prescribed way and thereafter tested at the end of the term in a summative way. Curriculum committees selected packaged textbooks covering a variety of material which educators most often used as ends in themselves. The result of such teaching practices was an ill-defined curriculum, loosely tied to the skills which were critical for learners to master. These constraints therefore allowed teachers to concentrate on input rather than on an outcome, or results oriented, system of education. Further constraints to the traditional way of teaching in South Africa will be dealt with in Chapter 2 (cf. 2.2)

It is clear then that transformation of South African education was necessary. Since South Africa strives to keep abreast with the rapid changes internationally, education had to be fundamentally different in order to invest in a dynamic workforce. Curriculators had to develop radically different ways of thinking about the provision of education. A revolutionary new approach to transform education then emerged – but not before the need for a new approach was thoroughly considered.

1.1.2 The Need for Relevant Education in South Africa

Spady (1994:41-42) is of the opinion that OBE in schools will prepare the learner for the world of work in the following ways:

- The focus is on the potential of all individuals to perform successfully.
- Actions are principle-driven.
- The emphasis falls on ‘success for all’.

- By establishing conditions in schools, learners are allowed and encouraged to do their best.
- By defining a learning outcome, learners become accustomed to ‘achieving quality everywhere’.
- The concept of organisational flexibility is a means to achieving clearly defined, high-quality outcomes.

Olivier (1998:3-4) states that competencies such as planning and communication are developed during an outcomes-based learning process to enable learners to use them in achieving work-related outcomes. Traditional methodologies do not empower learners fully for the real world. He says: “OBE focuses on *how*, *when* and *to what extent* knowledge, skills, attitudes and values should be mastered, understood and employed in order to achieve outcomes”. People’s daily lives are organised in an outcomes-based way according to their intended outcomes. In this way individuals plan, check and assess their outcomes while interacting with others. Tasks are executed to achieve these outcomes.

The change to OBE is the boldest South African national education reform to date and has numerous supporters as well as critics. Supporters of OBE view it as a cure-all whereas critics are certain that it is a trend or fad that is doomed to fail (Jansen 1997:2). Public and media furore over the new curriculum and opposition from some educators and educator unions, as well as a lack of pre-planning and validation of the programmes, contributed to its limited implementation in 1998.

The preceding paragraphs indicate the dire need for transformation in the South African education system to rectify the educational inequalities of the past. Should South Africa wish to be on par with the changes occurring internationally in the economic arena and in technological- and organisational developments, it is necessary to develop a skilled workforce which is globally competitive. South Africa has further come to realise the need for change in its approach to education. The world of work is a highly challenging environment which inspires individuals to reach their full potential and so it should be in the school where learners are preparing for their careers and the challenges facing it. Since life and work are constantly based on

reaching real-life outcomes, education is faced with the challenge of preparing learners in reaching demonstrable outcomes – the knowledge, skills, values and attitudes expected from learners in a future-focussed world.

The change to outcomes-based learning as opposed to content-based education is a major attempt to develop the country into an international role-player. This is achieved through establishing the necessary enabling environment and conditions to provide the means to understand, plan, execute, control, communicate, assess and improve processes, activities and end-products (outcomes).

The need for relevant education in South Africa is elaborated upon in a further chapter (cf. 2.3).

1.1.3 The Change to Outcomes-based Education

With the implementation of OBE in January 1998, education in South Africa has undergone a period of unprecedented curriculum change. The implementation was viewed as a radical educational reform. The Department of Education (DOE) (1997:1) views the change as a means to redress educational imbalances of the majority of the African population owing to historical educational disparities. The reform is based on the premise that the quality of school education in South Africa has been declining drastically and that a radical reform is required to improve the quality of schooling and to alleviate the high failure rates – the majority of which occur among African learners.

OBE seeks to develop citizens who are active and creative inventors and problem-solvers rather than meek and unthinking followers. It further attempts to inculcate an appreciation for diversity in the area of race, culture and gender. The OBE curriculum would change the traditional approach for learners from a content-driven focus to *outcomes* that are clearly defined in terms of what learners are expected to *know* and *do* after successfully completing a unit of learning (Taylor 1997:1).

The OBE practice is reflected in its principles, which shape the way in which schools should be operating. The constellation of principles (cf. 2.5.5.1) increases learners' and educators' opportunities for success. As they work together and reinforce each

other systematically, they establish the conditions that enable all learners to become and be recognised as successful learners (Spady 1994:5).

OBE suggests curriculum transformation that could be defined as “a way of looking at something in a new way, a move to a new mindset, a new attitude, a new way of thinking” (Boschee & Baron 1993:6).

Many people see OBE as controversial for the present era. This is also the case in the USA. Parkin (1994:35) expresses this controversy as follows: ‘OBE is controversial because it’s different from what people are used to’. By contrast, many South Africans have been looking forward to the new education model. For years many South Africans were disenfranchised, receiving sub-standard education. For them, the new educational strategy has created hope and great expectations.

By implication it would therefore be expected of all participants involved in OBE to contribute to the shift since it involves a new approach to a problem or set of circumstances. This is based on a totally new point of departure, the outcome, and coupled with an entirely new way of thinking. The basis of the concept is that learning is based on achieving an end-product and that learning takes place within the context of the outcome. The change is under further discussion in the next chapter (cf. 2.4).

1.1.4 Managing the Curriculum

South Africa is faced with complex challenges with the implementation of OBE since teachers have been accustomed to using a content-driven- and a largely rote-learning type of approach to teaching. From the researcher’s experience as a Curriculum Manager in the Eastern Cape Department of Education (EC DOE), attempts made to expose teachers to OBE through workshops held over a number of days, proved to be fruitless. However, their understanding of OBE is often better than that of their principals. This should not be the case since principals are tasked with implementing departmental policies. Therefore, as Pretorius (1998:105) suggests, school principals should study the outcomes-based approach in depth and become specialists. This will enhance their understanding of the changing role of the teacher in the teaching- and

learning process. They will also realise how they as principals, should assist the teacher in implementing OBE successfully.

The school principal should lead and manage his or her staff in such a way that teachers are able to work productively to ensure quality education. The principal as instructional leader should always be at the forefront of whatever changes are being introduced, so that he/she can provide the necessary guidance and assistance. Morphet, Johns and Reller (1982:311) maintain that school administrators are educational leaders and that this includes being instructional leaders. The question therefore is not *whether* they will be involved in the curriculum, but *how* they will be involved. Musaazi (1982:171) maintains that the principal as an administrator is responsible for achieving the objectives of the school through its established procedures and structures. OBE can be implemented successfully in a school where the principal as instructional leader, is a member of the team and is not isolated from the staff. Pretorius (1998b:100) believes that OBE is a process in which the entire community should grow and develop on a continuous basis in pursuit of excellence. A further discussion on managing the curriculum is to follow (cf. 2.7, 3.4).

1.1.5 Criticism of Outcomes-based Education

There has been a huge outcry over OBE since – and even prior to – its inception. Critics provided a number of reasons for its possible failure in the South African context.

Jansen (1998:325) says that OBE is based on the flawed assumptions of what happens inside schools, how classrooms are organized and what kinds of teachers exist within the system. For transformational OBE (cf. 2.5.3.3) to succeed, highly qualified teachers will be required. De Clercq (1997:140-144) claims that teachers with a poor teaching and/or professional background, limited resources and difficult working conditions, will find it almost impossible to improve their professional performance through an outcomes-based curriculum.

Jansen (1998:327) also questions the extent to which teachers were involved in the OBE initiative. He argues that only a small elite group of teachers, often expert and white, have driven the Learning Area Committees and other structures through which

OBE has been developed. De Clercq (1997:140) is of the opinion that curriculum research throughout the world has indicated the vital importance of building the professional capacity of teachers and involving them centrally as key agents in the design and implementation of new curricular approaches. Malcolm (2001:231) says that education in South Africa has no history of trusting teachers to design curriculum and assessment.

In an attempt to manage OBE, multiple administrative burdens are placed on teachers. The lack of support, the current policies of rationalisation and the subsequent increase in class sizes, mitigate against the conditions of its success (Jansen 1998:328). Chisholm (2000:3) agrees that implementation was not always carefully considered, properly piloted or resourced and a large amount of strain was consequently placed on already overburdened principals and teachers in widely diverse educational contexts. Jansen (1998:328) is also of the opinion that OBE trivializes curriculum content. Learners do not learn outcomes in a vacuum. Curriculum content should be regarded as a critical vehicle for giving meaning to a particular set of outcomes.

Teachers and principals should be trained and retrained for the implementation of OBE to be successful. OBE also requires that parents should be informed and trained (Jansen 1998:328-329). Kraak's (1998:49) most criticized aspect of OBE is its disregard for the centrality of the curriculum and the need for a professionally trained (cf. 3.3.2) and motivated (cf. 3.3.1.2) teacher corps. Pretorius (1998b:108) agrees that if the country's teachers are not thoroughly trained for an outcomes-based approach and the implementation is not accompanied by constant and well-planned support, little will be achieved regarding the high expectations of educational transformation.

OBE requires new assessment procedures. Jansen (1998:329) maintains that a radical review of assessment procedures is a key to successful curriculum innovation. The Learning Resource (1996:3) confirms that alternative and more comprehensive assessment strategies must be introduced to assess the multiple dimensions of learning. Some strategies could include performance assessment tasks, portfolios and self-assessment.

Van Wyk and Mothata (1998:1) are of the opinion that South African education has undergone extensive changes since 1998. The system has changed but the gap

between the previously advantaged schools and the previously disadvantaged schools, still exists. Vally and Spreen (1998:14) concur that, in contrast with the previously privileged schools, the previously disadvantaged schools have poorly qualified teachers, a lack of parental support and little, if any, access to the private sector which makes it difficult to implement OBE. De Clercq (1997:140) says that teachers with poor teaching and/or professional backgrounds, limited resources and who are working in difficult environments, find it difficult to improve their professional performance through an OBE curriculum. Considering that even most first world countries still find it difficult to implement OBE, it can be argued that South Africa – where discrepancies still exist between the previously advantaged and disadvantaged schools – will find it even more difficult to implement OBE.

The announcement by the South African government that Curriculum 2005 would be implemented in all grade one classes in January 1998, triggered a vigorous public debate. Concerns were expressed about the prospects of implementation – given the lack of teacher training, the low levels of material support for the new curriculum and the complexity of this curriculum innovation (Jansen 1999b:203). It was argued that these factors make OBE difficult to implement in a developing country. Vakalisa (2000:21) maintains that OBE is a controversial concept even in the country of its origin, the United States of America.

OBE is undoubtedly a revolutionary approach to education. Since it appears that district officials, principals and teachers are not adequately equipped with the knowledge and skills to implement an educational approach of this nature effectively, a vacuum has arisen and a study of the implementation of OBE, is therefore essential. For this project to unfold logically, the research process is outlined in the ensuing sections.

1.2 Statement of the Problem

From the above orientation to the problem in practice, the following research questions have emanated:

- What are the foundational aspects of OBE that would serve as a knowledge base for sound implementation practices?

- How should the curriculum of an educational innovation such as OBE, be managed?
- What are the perceptions of district officials, principals and teachers of the implementation of OBE at micro level, i.e. district, school and classroom level, in the Eastern Cape?
- What guidelines can be devised on the basis of the research to improve the implementation of OBE in the Eastern Cape?

1.3 Aim of the Research

From the above statement of the problem, the following aims for the research are forthcoming:

- to make a study of the foundations of OBE which will serve as a knowledge base for the implementation of OBE in schools
- to examine the thinking around sound practices for managing the curriculum to ensure effective OBE implementation
- to determine the perceptions of district officials, principals and teachers in the implementation of OBE in the Eastern Cape and
- to devise guidelines based on the findings of the research, to improve the implementation of OBE in the Eastern Cape.

1.4 Methods of Investigation

In order to achieve the above-mentioned aims, the following methods of investigation were implemented.

The theoretical and practical foundations of OBE are dealt with extensively in Chapter 2 to provide a theoretical framework to the investigation. A thorough study of the relevant

local and international literature was undertaken. A number of resources on OBE were obtained from universities in South Africa and abroad. Textbooks, scientific journals, training materials and policy documents from the Department of Education (DOE) were explored.

Strategies for managing the curriculum are dealt with in Chapter 3. A study of the relevant literature was made to establish processes and procedures for managing the curriculum effectively.

Chapter 4, in attaining the third aspect of the aim (cf. 1.3), provides descriptive information on the implementation of OBE in districts, schools and classrooms. An empirical investigation by means of a qualitative research approach examined how effectively OBE was being implemented in the Eastern Cape and it also identified the attributes and shortcomings in its implementation. Sampling was done in accordance with the different contexts in the province e.g. peri-urban, rural, etcetera. Data gathering consisted of face-to-face interviews, virtual interviews and focus group interviews with departmental officials at provincial level, district officials (mainly curriculum advisers) at district level and principals and teachers at school level. An examination of teachers' documents was also carried out at classroom level. Data analysis was done according to qualitative procedures.

As a departmental official based at the provincial office of the EC DOE, in the capacity of Curriculum Specialist in the Directorate Curriculum Management and Professional Development, I am involved in the planning, implementation and evaluation of OBE on a daily basis. Much of the information contained in this thesis therefore emanates from my intense involvement with national- and provincial officials and the training of district officials who, in turn, train principals and teachers. In 2004 I was seconded to the national office of the DOE for a period of seven months to train officials at provincial level throughout the country on the Revised National Curriculum Statement (RNCS). My professional position has therefore made it possible for me to carry out this research.

1.5 Structure of the Thesis

Apart from Chapter 1 which serves to promote the investigation and in which the background, problem statement, aims of the research and the methods of investigation are provided, the thesis is divided into four distinguished components, each representing a chapter which deals with a particular facet of the research aim.

Chapter 2, as indicated above, (cf. 1.4) deals with the first facet of the aim of this research. It provides a discussion on the theoretical foundations of OBE that serve as a knowledge base for the implementation of OBE at district, school and classroom level.

Chapter 3 (cf. 1.4) provides a study on ways of dealing with curriculum management. It deals with the second facet of the aim. It investigates on the roles of the principal, teacher and district officials in managing the curriculum. These roles ultimately provide the criteria for establishing the effectiveness of OBE implementation at classroom-, school- and district levels.

Chapter 4 (cf. 1.4 above), referring to the third aspect of the aim introduces the reader to a study of the perceptions of OBE implementation at micro level. Particular reference is made to the management functions of district officials, principals and teachers in the Eastern Cape at each of the three levels of implementation. The successes and limitations experienced by them in the implementation of OBE, are highlighted.

In Chapter 5 (cf. 1.4), the final chapter of the thesis, the reader is provided with an overview of the investigation and a synthesis of significant findings of the main investigation which includes guidelines and proposed structures for implementing OBE. This is followed by recommendations for further research.

1.6 Clarification of Concepts

A number of concepts are clarified in the chapters as they arise. However, key concepts are explained at the outset to avoid ambiguity or confusion. They are as follows:

- The Implementation of OBE

Generally speaking, the implementation of OBE is often seen as the delivery of OBE by the teacher at classroom level – but strictly speaking, the word *implementation* can have broader implications to include the implementation of OBE at other levels such as the school, district, provincial and even national levels. For the purpose of this research however, the concept *implementation* is limited to the classroom, school and district levels.

- Implementing the Curriculum

While the curriculum is the structure designed to take the OBE process forward, the concept *implementing the curriculum* refers to the role of the teacher in delivering the curriculum at classroom level. This is seen as the first function of the teacher in OBE (cf. 2.6.1). The second is assessing the learner (cf. 2.6.2). These two functions are not dealt with in the investigation in Chapter 4, since they are not management functions. They have therefore no significance to the ‘management perspective’ indicated in the title of the thesis. The role of the teacher in developing the curriculum (cf. 3.5.1) is however investigated.

- The Implementation of OBE at Micro-level

The concept *micro-level* can usually be placed at any level depending on its position in relation to the meso- and macro-levels. In a province, the micro-level could refer to the school if the meso-level is seen as the district and the macro-level as the province. Within the context of a school, the micro-level could refer to the classroom, the meso-level to middle management and the macro-level to the principal. For the purpose of this research however, the intention is to include the classroom, school *and* district in the micro-level. Although not dealing with any level higher in the education system, it can be assumed that the province is, by implication, included in the meso-level and the national structure, in the macro-level.

1.7 Summary

This chapter has provided an orientation to the problem in practice. The content-based approach to education was described and it appears that it is becoming irrelevant for a

changing society. The need for relevant education in South Africa was focused on and a conclusion indicated that, if implemented effectively, OBE could address the needs of learners in a changing world. The shift from content-based education to outcomes-based education where the emphasis is on outcomes, has enormous implications for district officials, principals and teachers in managing the curriculum. It requires that they focus their attention and efforts mainly on the desired end-results of education. An outline of the problem statement, aim of the research, methods of investigation and organization of the thesis has been presented. For purposes of clarity, a number of concept statements are listed.

The ensuing chapter introduces the theory and practice of OBE which provides a theoretical framework for the empirical investigation.