A COMPARATIVE ANALYSIS OF OUTCOMES BASED EDUCATION IN AUSTRALIA AND SOUTH AFRICA

by

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NOVEMBER 2000
For my Dad,

Ronald Percy Williamson,

17 October 1943 – 3 October 2000
DECLARATION OF AUTHENTICITY AND ACKNOWLEDGEMENT

I Merryl Cheryne Williamson declare that this dissertation is a product of my own work and that all references used have been acknowledged.

SIGNATURE
(M.C. WILLIAMSON)
SUMMARY

The introduction of OBE in South Africa, a developing country, has been characterized by problems relating to the implementation process. Thus a comparative analysis of OBE was conducted in Australia, a developed country, to compare the implementation process. A small scale sample investigation was carried out in 11 Australian and 11 South African classrooms. Findings were that Australia is a country found to be well resourced, politically and economically stable, with at least 10 years experience in OBE. Furthermore, small classroom sizes, support structures and teacher aides have enhanced the implementation of OBE in Australia. However, the findings indicated that similar problems have emerged in Australia and South Africa regarding the structure of OBE, assessment and reporting and the extra workload associated with the implementation of OBE. This suggests that there are problems inherent in the system of OBE.
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ABBREVIATIONS

ANFA    Australian Recognition Framework Arrangements
ANTA    Australian National Training Authority
AQF     Australian Qualifications Framework
ARF     Australian Recognition Framework
ATESOL  The Association of Teachers of English to Speakers of other Languages
CBE     Competency Based Education
CBET    Competency Based Education and Training
CBTE    Competency Based Teacher Education
CDC     Curriculum Development Centre
CEREP   Centre for Educational Research and Educational Policy
CSF     Curriculum and Standards Framework
DET     Department of Education and Training
DOE     Department of Education
DSE     Directorate of School Education
EMIS    Education Management Information System
ESL     English Second Language
GDP     Gross Domestic Product
HOD     House of Delegates
HOR     House of Representatives
HSC     Higher School Certificate
HSRC    Human Science Research Council
LBOTE   Language Backgrounds other than English
LOTE    Languages other than English
LSEN    Learners with Special Educational Needs
NAPTOSA National Professional Teachers Organisation of South Africa
NED     Natal Education Department
NEPI    National Education Policy Investigation
NQF     National Qualifications Framework
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<th>Acronym</th>
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<tr>
<td>NSW</td>
<td>New South Wales</td>
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<tr>
<td>NT</td>
<td>Northern Territory</td>
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<tr>
<td>NTCE</td>
<td>Northern Territory Certificate of Education</td>
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<td>NTF</td>
<td>National Training Framework</td>
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<tr>
<td>OBE</td>
<td>Outcomes Based Education</td>
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<tr>
<td>PALS</td>
<td>Primary and Secondary Access to Languages via Satellite</td>
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<tr>
<td>RTOs</td>
<td>Registered Training Organisations</td>
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<td>SAQA</td>
<td>South African Qualifications Authority</td>
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<td>SBCD</td>
<td>School Based Curriculum Development</td>
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<tr>
<td>SCCE</td>
<td>Senior Secondary Certificate of Education</td>
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<tr>
<td>TAFE</td>
<td>Technical and Further Education</td>
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<td>VET</td>
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CHAPTER ONE

BACKGROUND, PROBLEM FORMULATION AND AIDS

1.1 INTRODUCTION: BACKGROUND TO STUDY

This study compares the implementation strategies of Outcomes Based Education in Australia and South Africa. It examines critical problems surrounding OBE in South Africa and makes recommendations for its implementation here based on the conclusions drawn from research conducted in Australia, a country which has considerable experience with OBE. The previous political dispensation (Nationalist Party) in South Africa promoted a racially and culturally segregated and differentiated education system. Education was politically designed to oppress, cripple and discriminate between races in all spheres of their daily lives. The education system was divided into education for the elite and education for the masses. (Shaw, 1997: 24). In an effort to address the inequity of the past, the current ANC government (ANC) has adopted an educational approach implemented by many first world countries. Outcomes Based Education as a new strategy was introduced by the then Minister of Education, Mr. S.M. Bengu, in Cape Town in April 1997.

OBE is a movement conceived and developed chiefly by William G. Spady. According to Spady and Marshall OBE rests on three basic premises:

1. All students can learn and succeed (but not at the same rate).
2. Success in schools breeds further success.
3. Schools control the conditions of success.


Traditional OBE operates within the existing curricula and school system, explicating content and application in terms of outcomes. While teachers may appear to be more focused, two aspects appear to be problematic: the first is the neglect of the graduate as a total person; in other words, the main concern of this approach is on students’ success in school; secondly, the
culminating demonstration in traditional OBE is limited to small fragmented segments of instruction (Spady, 1993: 7).

**Transitional OBE** lies between traditional and transformational OBE in terms of scope and purpose. It moves away from the current or existing curricula, cutting across traditional subjects to identify outcomes that reflect higher order competencies. Emphasis is placed on critical thinking, effective communication and technological applications. Concern for students' culminating capabilities at graduation time is strong (Spady, 1993: 8-9).

**Transformational OBE** is future-orientated, requiring the creation of a whole new system focusing on performance capabilities of young people and their ability to be functional and competent in a multitude of real situations. Therefore, a metamorphosis is required in curriculum and strategic planning, resource allocation and outcomes. The sole purpose of transformational OBE is the students' success after they leave school (Spady, 1993: 10-11).

South Africa has chosen Transformational OBE to meet the needs of its learners and society as a whole. Transformational OBE arises from a sense that the existing educational system and syllabus impedes the development of a new society and fails to meet the needs of learners. Learners are assisted in acquiring skills to empower them so that they can participate competently in the local and global markets. Thus it is recommended that the entire education system in South Africa be accordingly changed to meet the needs of both country and society. (Department of Education (DOE), 1997g: 19).

Two main pressures have motivated the development of OBE in the international arena: the need to hold schools and other sites of learning accountable by demanding evidence of student achievement, and the need to ensure that schools and other learning institutions produce learners who have the skills required by the economy (King & Evans, 1991, McLean, 1995).

What follows is a brief summary of the salient features of OBE (Van der Horst & McDonald, 1997: 13-14):

1. What a learner needs to learn is stated clearly and unambiguously. The learning outcomes are future-orientated, learner-centred, focused on knowledge, skills and attitudes/values, and characterised by high expectations of all learners. The teacher acts
as facilitator rather than as a mere transmitter of knowledge, thereby promoting active participation of the learner.

2. The learner's progress is based on his or her demonstrated achievement.

3. Each learner's needs are catered for by means of a variety of instructional strategies and assessment tools.

4. Each learner is provided the necessary time and assistance to fulfil his or her potential.

It is hoped that OBE will be advantageous for South African education since teachers are forced to plan and prepare with a clear instructional purpose in mind. In other words, teachers need to know beforehand what they are going to achieve in their teaching. Furthermore, learners will know what is expected of them and can measure their own achievements. OBE encourages schools and teachers to be more accountable to the community for the quality of results, and more systematic teacher and school appraisal. (Mahomed, 1997).

The application of the conceptual framework as outlined above is dependent upon the currently prevailing circumstances in South African education. Therefore, certain practical issues have to be addressed.

1.1.1 Practical problems

The following practical problems surrounding OBE and its implementation have been identified in South Africa since its implementation in 1998. The problems discussed below are explored in detail in chapter four under the heading C2005 Review (cf.4.8).

1.1.1.1 The process of education

The growing infrastructure surrounding OBE seems to be hastening towards the outcomes of OBE instead of allowing the outcomes of education to become a success. Thus implementation of OBE appears to be accelerating the process of education at the expense of the learner.

Bruner noted thirty years ago that "Education is a process, not a product". No amount of 'teacher proof' curricula, tables of specifications, scope and sequence charts or lists of objectives can change these facts (McKernan, 1993: 343).
1.1.1.2 Access to training materials

According to Jansen (1997: 5) "The sad reality is that the overwhelming majority of teachers simply do not have access to information on OBE" a finding verified by this researcher. As late as November 1997, Grade 1 teachers who were expected to implement OBE at the beginning of 1998 still had no information on OBE. Their first introduction to OBE was at a workshop held in November, which was over two days only. Jansen (1997) observes that “… it is unfortunate that many of these teachers live in outlying areas with no telephones and really do not have easy access to information”.

1.1.1.3 Language barriers

The terminology and vocabulary which is used to present the OBE concept, even in the simplest booklet entitled “Curriculum 2005”, (DOE, 1997a) is pitched above the understanding of first, second and third language teachers. Malcolm (1997:15) asserts that texts on OBE “are not user-friendly for teachers and curriculum designers. The language is too complicated, the structure is too complicated and there are too many terms (indeed more than necessary)”.

1.1.1.4 Teacher training

The disparity in education and teacher training continues its existence in the new dispensation. There has been a slow evolution in terms of education and training delaying its eventual destination in Curriculum 2005. Van Rooy (1997: 7) notes that the Department of Education asserts that teaching will become a far more creative and innovative career. Learners will be trained to take responsibility for their own learning, which will ease the load on teachers and trainers. This will require a major mind shift, reorientation and considerable commitment from all the relevant participants. Pre-service and in-service teacher education will have to be completely transformed.

1.1.1.5 Teachers’ skills as assessors

“It is universally accepted that nothing so powerfully defines a curriculum in practice, in the classroom as the prevailing methods of assessment” (Madaus, 1997: 30-31). OBE calls for radical changes in assessment. Outcomes based approaches tend to favour the training side of the system and does not transfer easily into the education field which deals with abstract, non-
discrete forms of knowledge and complex skills not easily measurable (De Clercq, 1997: 139). The question is whether educators of different backgrounds, educational philosophies and approaches can agree how to interpret assess and monitor the achievement of outcomes in a similar manner (De Clercq, 1997: 140). Teachers will be required to reorganise the curriculum, increase the amount of time allocated for monitoring individual student progress against outcomes, administer appropriate forms of assessment and maintain comprehensive records. As experienced elsewhere (Schwartz & Cavener, 1994; Towers, 1994), OBE fails in the absence of adequate support such as “release time, aide and support” (Brady, 1996: 13) in Jansen (1999: 151-152).

1.1.1.6 Facilitator competency

The National Department of Education initiated the implementation of OBE through the use of pilot studies in the different provinces in South Africa. The grade one Pilot Project was implemented to train a core group of facilitators whose task it was to transform others. It was in this way that the Department of Education hoped to train all teachers in OBE. Many problems were identified in the various provinces. This project was poorly planned in terms of aptitude and facilitation. In Kwa-Zulu Natal Grade 1 Pilot Project teachers felt that provincial officials were themselves not clear about the changes to be made. Arguably teachers have found a one day workshop in an entirely new pedagogy insufficient to train a teacher adequately in radically different assessment methods and techniques and moreover, at the same time equip her/him to teach it to his/her colleagues (Vally & Spreen, 1998: 13). A recurring criticism cited by many teachers at the OBE workshops conducted by this researcher on behalf of the Department was that the training received focused too much on theory instead of on practical implementation.

1.1.1.7 Cultural discontinuity

A common fear highlighted by the teachers at the workshops convened by this researcher on OBE on behalf of the Department of Education was that multiculturalism was not being adhered to in schools. It was felt that the freedom of the teacher in his or her new role as facilitator, would manipulate the situation by propagating his or her beliefs to the exclusion of other views. As Hargreaves in (McLean 1995:42) makes clear “Teachers don’t merely deliver the curriculum, they develop it, define it and interpret it too. It is what teachers think, what teachers believe and what teachers do at the level of the classroom that ultimately shapes the kind of learning that young people get".
1.1.1.8 Financial constraints

According to Edusource (1998), provincial education departments are experiencing a severe financial crisis. Towards the end of January 1998, former House of Delegate schools in KwaZulu-Natal closed for two weeks in protest against the retrenchment of temporary teachers and the proposed implementation of new staffing norms, which would increase teacher-pupil ratios. The current teacher-pupil ratio in primary schools is 1:40 (DOE, 1998b). According to Grade 1 teachers, this makes assessment in OBE impossible. In rural areas where teachers are housing an average of 60-80 learners per class because of a lack of facilities stemming from financial constraints, OBE is impossible to implement. The researcher is of the opinion that the already disadvantaged will become more disadvantaged and the outcome will be mediocrity for all.

1.1.1.9 Disruption of classes

The preparation of Grade 1 teachers towards the implementation of OBE in 1998 had caused major disruption in schools with classes left unattended or with little or no supervision as teachers had to attend workshops with no replacements in their classes while they were away on training. According to South Africa’s Constitution, everyone has the right to basic education: “The state should do all that it can to ensure that everyone receives a basic education” (DOE, 1997f: 5). Thus it would appear that the state in its implementation has given little or no consideration for the rights of children to a basic education.

1.1.2 Rationale for this study

The researcher is a Foundation Phase teacher (junior primary) with thirteen years of teaching experience and five years of experience as a Head of Department for the Foundation Phase in her school. Thus the genesis of this study resides in a personal experience of OBE workshops organised by the Department of Education in KwaZulu Natal (Empangeni Region), for which the researcher had the good fortune to be responsible. From these workshops a pilot study was conducted and it became apparent that there were serious shortcomings in the implementation of OBE, with regard to the facilitation of workshops, understanding of the workshops by the teachers and the duration of the workshops. Through the passage of this dissertation many more shortcomings were revealed. Initial research undertaken by one of the districts in the
Empangeni Region on the 27 July 1998 showed interesting responses of schools implementing OBE. The graph below illustrates that 95 per cent of Grade 1 teachers in schools were in the process of implementing OBE.

![Graph illustrating 95% implementation of OBE](image)

**FIGURE 1.1 Are the workshops preparing you for the implementation of OBE?**

Subsequent workshops facilitated by this researcher in October 1998 provided the following information on teachers and facilitators through the completion of a questionnaire for initial research undertaken by the researcher. Question 7 of the questionnaire for the teachers is illustrated in the table below.

**TABLE 1.1 Is your school implementing OBE?**

<table>
<thead>
<tr>
<th>Comment</th>
<th>Number</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Partially</td>
<td>17</td>
<td>89.5%</td>
</tr>
<tr>
<td>Fully</td>
<td>1</td>
<td>5.3%</td>
</tr>
<tr>
<td>Not at all</td>
<td>1</td>
<td>5.3%</td>
</tr>
<tr>
<td><strong>Total</strong></td>
<td><strong>19</strong></td>
<td><strong>100%</strong></td>
</tr>
</tbody>
</table>

From Table 1 it is apparent that a discrepancy exists between the results of the survey undertaken by the Department of Education and by the researcher herself. A questionnaire
completed by the facilitators at the same OBE workshop demonstrates the facilitators' understanding of OBE in the table below.

**TABLE 1.2 Do you fully understand the concept of OBE?**

<table>
<thead>
<tr>
<th>Responses</th>
<th>Frequency</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Not very well</td>
<td>1</td>
<td>25</td>
</tr>
<tr>
<td>No</td>
<td>2</td>
<td>50</td>
</tr>
<tr>
<td>Partially</td>
<td>1</td>
<td>25</td>
</tr>
<tr>
<td>Total</td>
<td>4</td>
<td>100</td>
</tr>
</tbody>
</table>

As a consequence of the findings, this researcher in this study will expound the view that the implementation of OBE is not without problems. If not addressed, these will impact negatively on the education system and the children of South Africa.

In order to pursue the main thrust of this study research was conducted in Australian and South African schools to provide a basis for comparative analysis between a developed country and a developing country. According to Harbor (2000: 47), the terms ‘developed’ “traditionally referred to the richer, primarily industrial countries of the northern hemisphere, while ‘developing’ has referred to the poorer agricultural countries of the southern hemisphere which meant that the category of ‘developing’ countries would include the whole of Africa, Latin America, the Caribbean and most of Asia while ‘developed’ would include North America, Europe, the countries of the former Soviet Union and Japan, Australia and New Zealand”. However, development is now based on more diverse criteria such as social indicators concerned with health, education, the environment and gender equity. The choice of Australia as a site for comparative study was based on the following:

1. Australia was ranked fourteenth out of 175 countries in the annual United Nations Human Development Report based on life expectancy, adult literacy, proportions of enrolment in the different levels of education and the economic output (Harbor, 2000).
2. Australia has been involved in OBE since 1989 (cf 3.9.1).
3. The South African shift towards competencies and an outcomes based approach was influenced specifically on Australian debates (Christie, 1997).

Thus it was considered prudent to use Australia as a basis for the comparative study.

1.2 PROBLEM FORMULATION

Against the above background, the following research question is posed: How can the current implementation of an OBE based curriculum in South African schools be described with particular reference to similarities and differences in the process of implementation of OBE in schools in Australia? The research problem can be further sub-divided into several contingent questions enumerated below:

1. What factors have contributed to the development of an outcomes based approach to education?
2. How are these aforementioned issues understood and realised in the education systems of South Africa and Australia? How has OBE policy been developed and implemented in primary schools in these countries?
3. What features of an OBE approach towards teaching and learning can be observed in a small sample of classrooms in primary schools in Australia and South Africa respectively?
4. What similarities and differences emerge from an investigation of the implementation of OBE in South Africa and Australia? What are the implications and recommendations for the future development of OBE in South African schooling?

1.3 AIM OF INVESTIGATION

The objectives of this investigation are formulated as follows:

1. The research aims at identifying the factors which have contributed to the development of an outcomes based approach to education, explaining key terminology and models of outcomes based education and expounding the components of an outcomes based approach to teaching and learning. This will provide a conceptual framework within which to work.
2. The study aims at describing the shift towards an outcomes based approach to teaching and learning in the education systems of South Africa and Australia. Attention will be given to the structure of the education system and the particular factors leading to the development of an OBE approach in those countries respectively and the extent to which OBE has been introduced in schools in these countries.

3. The implementation of OBE will be explored by means of a qualitative investigation of classroom practice in a small sample of South African and Australian schools using multiple methods of data gathering.

4. Finally, similarities and differences in the understanding and implementation of OBE in both countries, which emerge, will be discussed and recommendations for practice in South Africa will be made.

1.4 METHODOLOGY

While a more detailed explication of the methodology and research design is presented in chapter 5, a basic overview is given here. Firstly a comprehensive literature study has been carried out making use of monographs, journal articles and relevant policy documents and legislation. The literature study has been further enhanced by means of informal discussions with key educationists and policy makers in the education systems of Australia and South Africa.

The design of the qualitative inquiry can be described as follows: observation, interviews and a questionnaire, which comprises closed and open-ended questions are used to gather data from a sample of classrooms in eleven selected primary schools in Australia and South Africa respectively in order to explore the way in which OBE is being implemented by teachers in the foundation phase (junior primary phase). Selection of sites and participants has been done by judgement or purpose sampling techniques, thus selecting sites and participants, which have the potential of yielding information rich data. Data analysis has been done by the detailed examination of field notes made during interviews and observation of classroom practice together with responses to questionnaires. The research is designed to be exploratory and descriptive and no attempts are made to predict behaviour or establish cause and effect relationships under experimental conditions. The primary aim of the inquiry is to understand and describe how teachers in the foundation phase are implementing an outcomes based approach within their classrooms from their own frame of reference.
1.5 LIMITATIONS OF THIS STUDY

The data in this study is limited in that the researcher chose only four schools in KwaZulu-Natal, each representative of the four ex-Departments of Education in South Africa. In Australia two states and one territory were visited. Furthermore, the researcher limited her study to the observation of the implementation of OBE in the lower grades in primary schools wherever possible. Schools were chosen on the basis of convenience, that is, with regard to accessibility and willingness of principals and teachers to co-operate. Schools were also selected on the basis of locality and status. For example, a private school, an ordinary state school and a rural state school were part of this study. Schools were not equitable in terms of resources, teacher-pupil ratios or other features. Teachers varied widely with regard to qualifications, teaching experience and cultural background.

1.6 CHAPTER DIVISION

Chapter One of this study introduces OBE and offers a rationale for the study as well as critical questions it addresses. The limitations of this study are also discussed.

Chapter Two explores the contextual factors contributing to the implementation of OBE within the educational, economic and socio-political context followed by the history and development of OBE. A conceptual analysis of OBE and its related concepts allows for clarification of the terms ‘Outcomes Based Education’ and ‘Competency Based Education’. In addition to the above, a critique of William Spady’s definition of OBE is explored. Finally, aspects which affect the implementation of OBE in the classroom, namely assessment, teacher training, curriculum planning and the learner, are discussed.

Chapter Three explores the education system in Australia and more importantly, the implementation of profiling which Australians explain is somewhat different to Spady’s version of OBE.

Chapter Four describes the South African education system in detail. Aspects covered are the past education system, factors giving rise to the new education system, contextual factors affecting the implementation of OBE and policy initiatives.

Chapter Five describes the research design and findings.
Chapter Six sets out to compare and contrast the implementation of OBE in Australia and South Africa followed by implications for South Africa, and finally recommendations for South African education.

1.7 SUMMARY

In this chapter, background to the research question and the purpose of the study were outlined. The researcher then noted the practical problems associated with the implementation of OBE in South Africa. The rationale for this study was preceded by a brief description of the research methodology and followed by the limitations of the particular study. The next chapter offers a literature review on OBE and its related concepts.
CHAPTER TWO

MAKING SENSE OF OBE: A CONCEPTUAL FRAMEWORK

2.1 INTRODUCTION

This study concerns a comparative study of OBE in two countries, South Africa and Australia. However, in order to understand why OBE is implemented differently in different contexts, it is critical that the guiding concepts such as competence, competency, performance, Competency Based Education (CBE) and Outcomes Based Education (OBE), which define this new approach, are clearly explicated. An attempt will also be made to distinguish between CBE and OBE. William Spady, a definitive authority on this topic, will be given particular attention in the literature, since the implementation of OBE in South Africa derives from his definition of OBE.

This chapter therefore provides a critical review of OBE and associated concepts in order to provide insights into and an understanding of the different implementation modes in later chapters of this dissertation.

2.2 FACTORS GIVING RISE TO COMPETENCY AND OUTCOMES BASED APPROACHES

In the following paragraphs factors influencing and giving rise to a competency and outcomes based approach will be discussed.

2.2.1 The educational context

OBE has deep roots in the educational philosophy called progressivism, championed by John Dewey (Manno, 1994; Olsen, 1997). During the 19th century, Dewey, a humanist, and his like-minded colleagues decided to use the public school system as a means of changing America.
the interests of the child. The aim of education, according to Dewey, was the development of individuals to their maximum potentialities. Education should not only benefit the individual but the community as well. Dewey encapsulated the above by arguing that “the educational end and the ultimate test of value of what is learned is its use and application in carrying on and improving the common life of all” (1916: 11). Furthermore, education must provide opportunity for the interplay of thinking and doing in the child’s classroom experience and that school should be organised as a “miniature community” where the teacher should be a guide and co-worker with the pupils, rather than a taskmaster assigning a fixed set of lessons and recitations (Archambault, 1974).

Manno (1994:3), claims that the latter part of the 20th century has seen a shift in the way educational quality is determined. Previously, quality was judged in terms of inputs, which comprised resources, intentions and efforts, institutions and other mechanisms. Today, educationists have moved towards the other end of the continuum, determining the quality of education by outputs. Outputs focus on goals and ends, products and results, outcomes and effects.

Radical educational change occurred in America during the mid-1960s when James S. Coleman was commissioned the by U.S Office of Education to conduct a major study on the equality of educational opportunities in America. His report (1966) suggested that inputs might not have a strong effect on equality of student achievement. Coleman, by virtue of the study, did not accept the input definition. Thus he shifted policy focus from the traditional comparison of inputs (measures of school quality historically used by school administrators to assess per-pupil expenditures, class size, teachers salaries, age of building and so on), to output (Manno, 1994:3).

Advocates who focus on outcomes in educational quality believe that we need specifics regarding what we expect our children to learn, and that they must be tested to determine whether they have learned it. The origin of this idea can be traced back to the 1920s, to ideas of educational reform linked to business models centred on specification of outcomes in behavioural objective form. The focus on outcomes has won many converts; however, the resource approaches to judging quality still dominate American education (Manno, 1994).

Concurrently with Coleman’s study humanist psychologists like Abraham Maslow, Carl Rogers and many others tried to introduce an emotional and spiritual component into the
behavioural mix. The emphasis and goal of education was self-actualisation. A whole new vocabulary then developed, introducing terms such as ‘facilitator’, ‘learner’, ‘critical thinking’, ‘self-esteem’, ‘group experience’, ‘experiential learning’ which are currently in vogue in South Africa (Traditional Education, not dated).

The 1983 report of the National Commission on Excellence in Education declared America to be a ‘nation at risk’. Its criticism was that American students were not learning enough and that the input focus and resource-based strategies of the 1960s were unsuccessful (Manno, 1994: 4). Consequently the 1970s heralded a move to establish minimum competency tests for students reflecting a focus on results. Part of this movement was ‘mastery learning’ popularised by Benjamin Bloom. Mastery learning is a process of learning whereby the learner continues to improve on goals and outcomes until he/she believes the objectives have been mastered (King & Evans, 1991:73, Manno, 1994:4). This movement also involved a group of behavioural scientists who embarked on a project classifying the outcomes of the educational process.

The result was Bloom’s Taxonomy of educational objectives, a behavioural classification of outcomes produced by a new curriculum that did away with traditional subject matter and teaching methods. The central figure behind this was Bloom, while the works of John Carroll played a significant role. Carroll’s work suggested that all students could achieve higher order skills if given enough time and higher quality instruction. Bloom similarly hypothesised through his Theory of Mastery Learning, which seems to be at the heart of OBE, that most students can learn what the schools have to teach if the learning conditions are right. (Olsen, 1997: 12). Bloom developed his taxonomy however, for the cognitive domain only. Thus learning outcomes were based only on memory, understanding and reasoning. (Van der Horst & McDonald, 1997: 37).

According to Manno (1994: 4) “the single most important effort to turn the focus toward outcomes was that of the National Governors’ Association (a reform group in America advancing education) in the 1980s when they decided to devote twelve months to investigating one subject - education” (Manno, 1994: 4). The reason was that “Better schools mean better jobs. To meet competition from workers in the rest of the world, we must educate ourselves and our children as we never have before” . The conclusion reached was that outcomes in education would improve student achievement and make educators accountable for results in the classroom (Manno, 1994:4). In short, the time had come to place primary emphasis on what people learn, and the outcomes they achieve (Manno, 1994: 4).
From the above discussion it seems that Bloom’s taxonomy contradicts Dewey’s view of holistic development because it propagates only the cognitive development of the child. By this the researcher means that Bloom’s theory focuses particularly on the learners’ cognitive development without due emphasis on inter-personal relationships in community, as Dewey propounds. Therefore, if OBE is based on Bloom’s taxonomy, students’ learning would be individualised and not directly a result of interaction in the reality of community life. One wonders if this would be any different from the traditional system of curricularised education. From the above it can be concluded that factors contributing to the rise of outcomes and competency based education in the 20th century emanated from the time of Dewey in the 19th century and is now propounded by William Spady in the U.S.

2.2.2 Schools of thought

Three schools of educational thought, discussed below, have underpinned the development of OBE:

2.2.2.1 The School of Behaviourism

According to Jordaan and Jordaan (1998: 14), “the name behaviourism indicates the primary object of study: observable behaviour of people and animals, and how these responses relate to environmental occurrences”. Behaviourists are totally uninterested in a person’s experience of a situation and how this experience influences behaviour in a particular situation. All that is of concern is behaviour (responses) that took place or takes place and how these responses related to or relates to environmental occurrences. OBE focuses on learner behaviour (performance) and the stimuli used to induce desired behaviour. The process of learning is inconsequential as only the end result is of importance. The School of Behaviourism has its genesis in the research of Pavlov and Skinner, who proposed the theory of operant conditioning, in which behaviour is repeated when it is reinforced or rewarded (Harris, Guthrie, Hobart & Lundberg, 1995: 16). CBE has been closely associated with this model, which incorporates aspects of logical positivism, and supports the notion that ‘reality is external to the individual and objective in nature’ (Hodkinson, 1992: 31). “Under this system, learning is seen as goal directed. Goals are defined by behaviour that is measurable”. (Mahomed, 1996:21). The demonstration of skills, are seen as achievement of outcomes.
2.2.2.2 The Cognitivist School

According to Jordaan and Jordaan (1998: 25), “the terms cognitive and cognition is derived from the Latin term ‘cognoscere’ meaning to know or be conscious of”. Relevant features of the cognitive school of thought, according to Jordaan and Jordaan (1998: 25), are:

- Behaviour is studied along with the mental processes that give rise to it, for example, how people perceive, how people learn things so that they remember, and so on.
- Knowledge about the operation of these processes is systematised so as to determine how people decide on the meanings that they attach to one another, to things and events.

The Cognitivist School stresses the inner processes and structure of the mind as a person learns. Its main proponents have been Ausubel, Bruner and Gagne, with a developmental emphasis from Piaget. Unlike the Behaviourist School of thought in which performance is the defining criterion, in the Cognitivist School performance is but one of the numerous interwoven components including schema and intellectual processes (Mahomed, 1996: 22). ‘Schema’ refers to a mental representation of a set of related categories (Hodgkinson, 1992: 33). In other words, learning is seen as an interaction between the learner and that which is being learned. It is from this school that we obtain a degree of opposition to the specificity of outcomes that are associated with Competency Based Education and Training (Harris, Guthrie, Hobart & Lundberg, 1995: 17).

One of the expressions of this school of thought in education is “constructivism” in which the learner is not seen as a blank slate. In this situation the learner brings to the learning situation a host of prior experiences, which is acknowledged by the South African Qualification Authority Act (SAQA) emphasising the recognition of prior learning. Implications for the educators in the implementation of OBE are that they will first have to establish what the learner already knows.

2.2.2.3 The Humanist School

The proponents of the Humanist School of thought are Dewey, Carl Rogers and Abraham Maslow. It places the emphasis on the person as a holistic being and allows for considerable individual differences that characterise learners (Olsen, 1997: 1). This means that the emphasis
should not only be on what education teaches a person to do, but on what it causes a person to be as a whole. Within an OBE context the individual learner in the learning situation is assessed on the sum total of all his learning experiences and not just on individual acts of learning. In other words, education is seen as meaningful and allows one to act on what one knows. The humanist school of thought emphasises the acquisition of basic needs in order for higher order needs to be met. This poses a problem in disadvantaged communities where basic needs such as food and shelter are a scarcity.

The various schools of thought have been briefly discussed showing its influence on OBE. In the next section economic, socio-political and historical processes arising out of a globalised and integrated economy had important implications for the way in which people are prepared to enter the economic arena will be discussed.

2.2.3 Economic incentives

Factors contributing to the rise of OBE have been influenced by a decline in the economic production in many countries. The world has today become a global village with links in Information Technology, educational development and interdependent economies. Giddens (1993: 528) observes that “The world has become in important respects a single social system, as a result of growing ties of interdependence which now affect everyone”. In the modern world with its global economy, no first world country worth its salt can remain unaffected economically when any other major first world country’s economy changes either positively or negatively. For example, the adverse effects of the Russian rouble, and more recently the Asian economic crisis, terrified the economies of the rest of the world (Hammond, 1998: 1).

The argument for good education relates directly to the survival of the individual in the economy itself. He has to sell his labour or skills in the open market. The more skilled he is, the more he rubs shoulders with fewer workers of competence, which creates a greater demand for his or her services. This short supply of high skills and greater demand for it means that such a person is able to sell to the higher bidder. According to Thurow (1972: 819), this posits wage competition as the driving force of the labour market. It assumes that people come into the labour market with a definite, pre-existing set of skills (or lack thereof), and with the notion that they can compete against one another on the basis of wages. According to this theory, education is crucial because it creates the skills which people bring into the market. This suggests that the more skilled an individual becomes as a result of education, the higher he/she
can move up the social stratification ladder. He/She earns more money and increases the number of skilled personnel while reducing the number of unskilled labourers. In this way the wage gap is reduced and a measure of balance is introduced into the now developing economy. The OBE movement has been energised by industry because it requires a labour force skilled in favour of greater production. The economy requires people with demonstrable skills and competencies for the global economy. OBE is designed to meet this need focusing on outcomes.

2.2.4 The Socio-political context

The historical process of discrimination along with gender, class and race has left an indelible mark on the ordering of society in most countries. Discrimination, whether on the basis of race, sex or creed, has impacted on or has been used to justify preferential practice in the areas of selection, recruitment and promotion and the consequent advancement of one group over another.

Practices associated with selection, recruitment and promotion and taken-for-granted assumptions, such as social sex-role stereotyping, limit conscious choices about who should be trained to do what and how different types of skills should be rewarded. Technical education and training, and employment in trade and technical occupations have reflected the most severe bias against women.

“Although the ‘mobilisation of bias’ is less overt it remains effective in restricting women and girls and other disadvantaged clients to education and training services and related employment” (Harris, Guthrie, Hobart & Lundberg, 1995: 11-13; Lemmer, 1993: 23). These two factors are at work in any society to either discriminate within the population of the economy or to open the market to make it free for any individual to participate on merit (Hammond, 1998). Hammond argues that bureaucracies are created by societies to limit the numbers of professionals in a particular field, leading to greater wealth for the few at the expense of the masses. Racial discrimination is a historical fact operating to the detriment of the minorities in America, Australia and the United Kingdom, with long-term effects.

In the case of South Africa, the consequences of educational discrimination against people of colour saw the genesis of OBE, which can be seen as an attempt to remedy the maladies of the previous educational regime. Similar efforts to rectify the inadequacies of previous educational
policies in Australia also adopted OBE as a measure to address the inequity of the past. The government hopes that transformational OBE will create equal opportunity for all categories of learners to enter the job market and have a stake in the economy irrespective of their cultural background and socio-economic status. In the opinion of the researcher OBE may be viewed inclusionary rather than exclusionary.

2.2.5 Historcal context

The advent of the Industrial Revolution in America and the evolution of its economy from an agricultural to an industrial economy, led to the introduction of Competency Based Education and Training (CBET) to cater for the more technically advanced workplace. Increasingly, the workplace was seen to become technologically oriented (Theron & Van Staden, 1996). Legislative enactments resulted in the establishment of various universities to address the practical skills needed in the workplace. During the period leading up to World Wars 1 and 11 and the Great Depression, increasing emphasis was placed on an education system which would cope with the technological complexity of jobs.

In the period following World War 11 the debate in the educational arena on the advisability of an education system predicated on training rather academic education continued unabated. Advocates of CBET argued for a holistic approach to education rather than an atomistic one. It was in this industrial and philosophical context that CBET has evolved in many countries namely Australia, Britain, America, Canada, and so on, (Harris, Guthrie, Hobart & Lundberg, 1995: 38) followed by OBE.

2.3 KEY TERMINOLGY

It is imperative that the terms of reference in OBE be analysed and clarified, as they are crucial to the 'modus operandi' of achieving outcomes.

All education systems rest on three pillars:

- what is taught;
- how learning and teaching occur, and
- measures of how successful the first two are.
The three concepts ‘competence’, ‘competency’ and ‘performance’ in OBE are the variables against which the success of learning is measured. A successful learner will thus be regarded as a competent performer. The following questions thus need to be answered:

- What are competence, competency and performance?
- What do these concepts comprise?
- Why are answers to these questions important?

Through careful examination the researcher hopes to respond to the following:

- Are competence, competency and performance valid or appropriate variables against which success should be measured?
- Are they sufficient to meet the needs of an adequate measure?
- Can these variables be standardised and can uniform interpretation be given to them?

What follows is an examination of the above variables which will show that they are neither unproblematic nor without contradiction, making uniform application of OBE difficult. The criteria for assessing competence will inevitably vary from teacher to teacher and from school to school.

### 2.3.1 Performance

Many definitions have been expounded and cited on the definition of performance. The researcher refers specifically to two definitions, namely to the views of Doll (1984) and the Human Sciences Research Council (1995), to offer a brief overview of ‘performance’. My objective here is to highlight the contrasting views held and ultimately bring to the fore their implications.

According to Doll (in Short, 1984: 124), performance refers essentially to a “doing” which is “completed, finished, achieved”; hence performance is a task finished. It carries no judgement of value as to how well the task is done, just that it is done. Doll views performance as being purely mechanical, the implication being that it is not of the mind. How then, does one assess performance in the light of acquired competence or competencies? In other words, the above definition seems to comply with the behaviourist views of Skinner (see paragraph 2.2.2.1).
On the other hand, a HSRC (1995: 41) document entitled "Ways of seeing the National Qualifications Framework" views performance, as a simultaneous demonstration of a whole range of human dimensions. Traditionally, performance comprised the following components: Knowledge + Understanding + Skills + Values / Attitudes = Performance. The HSRC document holds that all components should be integrated into a whole as follows:

- What we know depends on how we think about or process information (abilities relating to problem-posing, analysis and synthesis). This equals knowledge.
- Knowledge is part of performance and is not value free. It is the internalised understanding that a person brings to bear on a particular situation. Thus, understanding is not separate from knowledge: it is knowledge.
- The formulation of knowledge occurs within a particular value orientation. Values are part of performance since they determine the ways in which we process information mentally and emotionally. A difference in values leads to a different kind of thinking.
- Performance actions may be verbal, written or may involve using tools. The manipulation of tools and the manual dexterity required to use them are a part of performance, but in themselves do not constitute performance. The mental and emotional dimensions of performance bring meaning and expression to the manipulation of tools and the manual dexterity required to use them.
- Performance does not occur in a vacuum. People act with or in relation to other people. The communicative dimension of performance provides one of the standards against which performance is judged. This includes an assessment of language usage, the ability to express ourselves clearly as well as gestural aspects.
- According to the HSRC document (1995: 41) "...when we observe human action we are to use a metaphor-only seeing the tip of the iceberg. The myriad of conscious and unconscious mental and emotional judgements and decisions that inform or direct actions are 'under the surface' like the rest of the iceberg".
- The term ‘capability’ is used to convey an understanding of “expert” performance. A person demonstrates competence when he or she integrates a range of capabilities in continuous activity. These include content/information plus the use of conceptual problem-posing and problem-solving abilities, tool usage and dexterity abilities, communication and social interaction abilities equals’ capability (HSRC, 1995: 39 – 44).
The HSRC document offers a different concept of performance which involves the integration of multiple faculties (affective, cognitive, and social). It is the researchers opinion that performance cannot be viewed in isolation as Doll suggests, this does illuminate critical issues. Very little has been said by Doll about what a student should know and be able to do, and there is a lack of clear definition of performance. This implies that in order to achieve standards of performance in education schools will have to develop standards. The problem arises that if schools do not have uniformity, how can the global village standardise performance? The implication is that more affluent countries and institutions would be able to implement criteria for performance befitting their financial capabilities. The implication for South Africa’s implementation of OBE is that careful consideration of the criteria determining performance and its standardisation is imperative.

2.3.2 Competence

A review of the literature suggests that there is no uniform definition of competence. The spectrum of opinion varies from definitions based on performance (Mansfield & Wolf, 1989); attainment of skills and tasks completed (Fagan, Short, & Noddings, 1984), to potential, ability and aptitude (Short1984, Pearson1984, Doll, 1984) and lastly, qualifications (HSRC, 1995). Mansfield and Wolf (1989) attempt to explain competence from a vocational education and training perspective. The researcher has attempted to adapt these perspectives on competence to explore the concept further.

2.3.2.1 Views of Wolf and Mansfield

According to Wolf (1989), competence is essentially about performance. In other words, one is expected to perform to specified standards. Mansfield (1989: 26) supports Wolf’s view: if we are clear about the meaning of competence, we would be able to derive a common frame of reference which would describe what competence means. Thus the standards that would incorporate competence would specify the nature of particular performable roles. Such roles can be narrowly or highly specialised depending on the area of expertise.

However, it must be noted that for Wolf, competence is a ‘construct’ and not something we can observe directly, unlike knowledge, understanding and skills (Wolf, 1989: 40). While knowledge and understanding contribute to competence, they cannot be directly observed or measured: “...knowledge and understanding are likely to be highly contextualised – and so
correspondingly, is competence” (Wolf, 1989: 44). This implies that it is difficult to deduce from a single measure or a number of measures, just how far competence extends (Wolf, 1989: 44). A schematic representation of this conceptualisation is shown in Figures 1 and 2.

In Figure 1, knowledge and understanding are themselves constructs, which are assumed to contribute to competence. They can be inferred from measures of competence or from direct measures. Since we are ultimately interested only in competence, it might seem perverse to opt for direct measures of the contributing construct. At the same time, the difficulty of making correct inferences without substantial evidence, and the fact that direct measures of competence are themselves highly contextualised, mean that we may find it very hard to acquire adequate evidence by focussing on competence alone (Wolf, 1989: 46).

Figure 2 “identifies performance as the best possible measure of competence” (Wolf, 1989: 46). Wolf acknowledges that there are “other tests which are definitely indirect measures of actual performance, classified as providing evidence of performance: and, even more germane here, all measures of competence, whether at one or two moves, shown as providing evidence of knowledge and understanding” (1989: 46).

As mentioned below, Wolf and Mansfield (1989) provide insight into competence from a Vocational Education and Training perspective. Doll’s view coincides with the views of Wolf and Mansfield, but from a purely educational perspective (in schools).
Figure 2.1 'Unpacking' knowledge and understanding (Wolf 1989:45)

Figure 2.2 Performance as a measure of competence (Wolf 1989:46)
2.3.2.2 Views of Chomsky, Piaget and Bruner

A literature review is provided on Chomsky, a linguistic, Piaget, a developmental psychologist and Bruner, a humanist to highlight their views on competence and performance.

i. Chomsky

According to Doll (1984: 125), Chomsky illuminates the competence–performance distinction by operating at three levels namely, linguistics, rules and humanness. In each of these levels, performance cannot be taken at face value.

According to Chomsky, (in Doll, 1984: 125) at the linguistic level mistakes in performance are not necessarily mistakes in competence. For example, a musician may give a poor performance because of nervousness or other personal factors. Chomsky argues that there is logic and creative ability in the mistakes children make in the learning of grammar. For instance, the researcher’s five-year-old nephew described peanuts in a shell as “nuts in a container”. Here is an instance of logical and creative thinking expressed linguistically. Chomsky’s theory of language is based on the premise that language is acquired in terms of universals that are innate to human beings. These innate universals make up what he calls a “universal grammar” (Chomsky, 1957; Chomsky, 1965) and grammar itself is defined by as “a system of rules that determine a certain pairing of sound and meaning” (Chomsky, 1967: 406). The basis of universal grammar is that all people are born with a language faculty. According to Doll, Chomsky finds that the experience response patterns that behaviourists depend on so heavily was significant. Part of this faculty is the innate ability to acquire a specific language by adapting it to the universals that are contained in the faculty. Simply stated, universal grammar assumes that “there is no specific genetic endowment for learning particular languages, but there must be some genetic endowment enabling humans to learn language in general” (Jensen, 1990: 3).

Chomsky argues that structural patterning has a ‘creative aspect’ to it, found in the human ability to express and understand new thoughts within the structure of an instituted language. This structure is formed by the grammar rules underlying a language. Chomsky contends that there is a grammar or a language that exists at a deeper level than the actual surface structure or any spoken and written manifestation. All sentences and expressions, whether through input or output, can be reduced to a single form that exists at a deep level, that is, psychologically real. Using these deep structures is, however, dependent on “generativity”. Generativity is the ability
to produce sentences that one has never heard before merely on the basis of an internalised and psychologically real grammar (Wright, 1990; Lyons, 1977; Peacocke, 1990). Despite finite exposure to grammatical and meaningful utterances (Miller, 1964), “knowledge of these rules is knowledge of the language’s structure, and individuals display this competence when they perform with language” (Chomsky in Doll, 1984: 125).

There is a connection between deep and surface structure and ‘competence’ and ‘performance’ respectively. “The performance of the speaker or hearer is a complex matter that involves many factors. One factor affecting the speaker-hearer’s performance is his knowledge of the grammar that determines an intrinsic connection of sound and meaning for each sentence. We refer to this knowledge which is, for the most part, unconscious knowledge, as the speaker-hearer’s “competence”. Competence, in this sense, is not to be confused with performance. Performance, that is, what the speaker-hearer actually does, is based not only on his knowledge of the language, but on many other factors such as memory, restrictions, inattention, distraction, non-linguistic knowledge and beliefs, and so on (Chomsky & Halle, 1968: 3). What is important in performance is not so much whether it is correct or incorrect but whether it reflects a connection with the rules of grammar.

According to Doll (1984: 126) Chomsky emphasises the rule–performance connection because he believes it to be universal, innate and indicative of human thought, while the correctness of a performance is cultural and thus arbitrary. Through linguistic competence, humans display the nature of the mind by conversing with one another about their thoughts, feelings and judgements. Thus the real power of a language and of a person lies in the fact that competence allows one to generate an infinite variety of sentences from a finite set of structures and rules. The task is thus to get behind performance to competence.

ii. Piaget

According to Doll (1984: 127), Piaget’s view of competence is important as it relates to the biological model of change. Piaget explains cognitive growth in terms of intellectual development. (His basic belief is that intelligence can be seen from behaviour which verbal or otherwise, is the manifestation of intelligence) (Piaget & Inhelder, 1966; Piaget, Inhelder & Sinclair, 1968). By studying children’s behaviour, it is possible to understand their cognitive growth and their increasing intelligence, which is essentially built up in a constructivist way. In other words knowledge makes intelligence and is built up or created by an interaction
between the individual as a biological unit and already existing information (Biehler & Snowman, 1990).

Humans organise and adapt (the processes) in order to create schemes (the products), thus facilitating higher-level organisation and more effective adaptation. The cause of these processes is the process of 'equilibration' (Biehler & Snowman, 1990:59). Equilibration is “a self-regulating mechanism that governs the development of intelligence within the individual” (Furth, 1969: 206). It is an “intrinsic and constitutive property of organic and mental life” (Piaget, 1968: 102); intelligence can develop by adapting to internal and external changes.

Equilibration is brought about by the state of “disequilibrium” (Biehler & Snowman, 1990: 59-61). This is a consequence of the differences and discrepancies that may exist between novel situations and the subjective schemes of each individual. Every individual seeks to resolve this discrepancy and reach a state of equilibrium. Disequilibrium is essential however, for the construction of knowledge, for without it one would find oneself in a state of constancy, lacking growth and knowledge.

Doll (1984: 127), asserts that the idea of structure is important for Piaget: it is this that separates him from the behaviourist psychologists. In the Behaviouristic Model only the observable and measurable is dealt with; the parts are assumed to equal the whole, and the whole is assumed to be divisible into its parts. Independent variables of human behaviour are not given attention.

Here the idea of structures as organisational patterns of the mind, underlying and controlling behaviour, was taboo.

For Piaget, learning is framed in structural terms and comprises the structures-of-the-whole, namely the sensory-motor, the pre-operational, the concrete-operational and the formal-operational. Each of these structures has its own mode of operation. While the child is at a particular stage, his/her actions, perceptions and thoughts are governed by these structures. According to Piaget (in Doll, 1984: 128), “the child cannot proceed in any way he likes. He finds himself, as it were, in a field of force governed by the laws of equilibrium, carrying out transformations or operations determined not only by occurrences in the immediate past, but by the laws of the whole operational field of which these past occurrences form a part”. Each level
is characterised by competence patterns, which influence behaviour in the same way that Chomsky’s system of rule underlies performance.

Doll equates those things Piaget calls “structures-of-the-whole” to competence as abilities underlying and partially controlling performance. By so equating the two concepts, the reader will note that while Piaget does not use the word ‘competence’, his idea of ‘structures-of-the- whole’ refers to competence.

iii. Bruner

Bruner’s discussion on competence centres on the role of culture in assessing differences amongst people but acknowledges Chomsky’s competence-performance distinction and Piaget’s biological model. Bruner raises the competence-performance distinction in his essay on ‘Cultural Difference’, challenging the idea that minority students who perform poorly in school are incompetent. He extends the competence-performance distinction by stating that the teacher’s task is:

- To find a performance outlet appropriate for an individual’s competence to emerge.
- To assist the individual to transfer his/her competence-performance skill from one area to another (Doll, 1984: 131).

According to Bruner, (in Doll, 1984: 131) linguistic and intellectual differences were attributable to difference within a social context rather than underlying competence differences. Bruner, like Chomsky, claims that cultural/contextual factors come into play when an individual expresses his competence via performance (Doll, 1984:131). Therefore, he argues that those groups diagnosed as culturally deprived have the same underlying competence as those in the mainstream of a dominant culture and that the difference in performance is attributable to varying situations and contexts in which competence is expressed. Bruner (in Doll, 1984: 131-132) reminds us that it is difficult to infer competence directly from performance. He argues that since competence needs to have a performance outlet, it is the teacher’s task not only to find that outlet but also to assist the individual to transfer the competence-performance relation from the known to the unknown.

Bruner’s other use is dependent on Robert White’s concept of ‘competence motivation’, which is compatible with Piaget’s notion of equilibrium and disequilibrium as explained above. In
short, competence is the ability to control the internal and external environment (needs to deal with the environment). The first principle for the development of competence is to maintain the internal drive. Competence is its own reward and should not be lessened with external rewards (Robert White’s theory).

However, the manner in which a child moves from one competency level to the next has not been answered (Doll, 1984: 128). Doll uses both Chomsky and Piaget to support his claims that change in individuals is innate. However, for Piaget the attainment of competency can be from both internal and external sources. Piaget asserts that competence can be seen as proceeding according to some sort of inner, genetic mechanism or can emanate from the environment. Chomsky, in contrast to Piaget, views competence as emanating from internal factors only. Lastly, while Bruner agrees that competence is influenced by both internal and external factors, competence should be internally driven and disadvantaged groups should not be labelled as incompetent purely on social standards.

From the above it would appear that while competence and performance go hand in hand, cultural diversity is important in assessing competence. This is especially important for South Africa, where cultural diversity is extensive and social levels vary drastically. While linguistic competence is essential for the South African situation, the fact that we have eleven official languages cannot be ignored. If OBE is to work in South Africa, these serious concerns relating to different cultures, environments and the large number of languages in use must be firmly dealt with in the approach to re-training teachers to effect a paradigm shift from the traditional system of education to the implementation of OBE.

An attempt will now be made to define competence from the point of view of skills attainment.

2.3.2.3 Views of Fagan, Noddings and Short

According to Fagan (1984: 8), competence is viewed as a given task, goal or skill which has been learned and evidence of which can be verified. All of us at some point in our lives demonstrate academic competence (the ability to perform with a passing grade). However, an updated check would reveal a loss of competence as a result of interest, motivation and time to review the material or skill learned. This is reiterated by Noddings (1984: 23) who claims that “related difficulty with competencies measured individually at specific times is that they disappear”. He uses the example of students passing a test on computation with fractions and
then moving onto other units of work. A few weeks later they can no longer compute adequately with fractions. While there appears to be no harm in stating what students should be able to do at various end-points in instruction, to assume that the curriculum and all learning associated with it can be fashioned sequentially is a grave mistake. According to Noddings (1984: 24), “students must be immersed in situations that continually call forth the desire for competence”. Following this, Noddings presents competence in terms of potential, ability and aptitude.

Short, (1984: 165) defines competence as a quality or a state of being competent, where one is said to have competence in some realm. This generally means that someone possesses a general quality but we do not know specifically what he is capable of doing. Pearson (1984: 31), is more definitive as he claims that competence means knowing more than how to do something. He argues further that competence does not imply superiority or outstanding behaviour. It is distinct from authority, which implies “thorough knowledge of a topic”. We thus turn to authorities for an expert opinion, as a competent person is regarded as a source of basic information. Authority connotes the mastery of higher reaches/orders of the field. Doll (1984: 124) concurs with these claims. Competence, he observes, refers to a state of being. One who is competent has a certain “fitness, sufficiency or aptitude”, to “adequately deal with the situation”.

2.3.2.4 Views of the Human Sciences Research Council

The Human Sciences Research Council (HSRC, 1995: 54) document entitled “Ways of Seeing the National Qualifications Framework” refers to ‘competence’ as the integrated application of capabilities within specified contexts, which may stem from being familiar and predictable to being completely uncertain, unfamiliar and unpredictable, depending on the level of competence required. Within the National Qualifications Framework (NQF), competence can be recognised within and through a qualification. This means that progression pathways of qualifications would express different levels of competence (Mahomed 1996: 4).

Definitions of competence emerged from various sectors implementing OBE in South Africa. The concept in many cases has been criticised for being atomistic, individualistic and unable to cover all types of relevant behaviour or mental activity (Mahomed, 1996: 7). It therefore requires some scrutiny.
2.3.2.5 Critiques and problems of definition

From the definitions discussed there seems to be no uniform agreement on what competence may imply. It is quite clear that it has been equated with performance. While competence and performance involve demonstration, no mention is made of minimal competencies that are to be achieved. In other words, no qualitative criteria for minimal performance are evident in the literature. This has serious implications for South Africa, with the already large disparity in instruction and resources in schools as well as in tertiary institutions. It could be even more problematic if no concrete criteria for competence exist. At the same time, the researcher is quite aware that true competence cannot be prescribed, but ascribed. OBE, as a totally new approach in South Africa, has manifested insufficient guiding principles in implementation. Without guiding principles, standards in education could drop even further.

The adage, "beauty lies in the eye of the beholder" reminds the researcher of standards in competence. Teachers will envisage the concept of competence in different ways, depending on their experiential backgrounds and levels of expertise.

2.3.3 Competency

While competence and competency appear to mean the same thing, the literature suggests that there is, in fact, a subtle distinction between the two concepts.

According to Pearson (in Short, 1984) it is essential to first look at a non-educational judgement of competency in order to gain insight into the logic of the concept before superimposing any educational issues. He uses the example of a person driving a car. The question to be asked when one is said to be a competent driver, is "what information has been described about the person when this judgement is made?" In other words, the assumption is made that the person is not ignorant of how to drive a car and if he/she can drive competently it is assumed that he/she knows how to drive. Pearson then concludes that competency implies knowledge. However, he asserts that knowledge, while necessary for competency, is not sufficient. Knowing how to drive and driving competently are two different things. One may know how to manoeuvre in traffic or how to park but may create havoc every time one ventures on the freeways, by changing lanes without looking or knocking down pedestrians. There would be no hesitation in calling this person incompetent: "Thus competency implies knowing more than how to do something; it implies the mastery of basic knowledge" (Pearson
in Short, 1984: 32). Though competency does not portray a level of performance it indicates the level at which a person’s performance becomes commendable.

As Short (1984: 165) states, competency refers to a specified attribute that may be possessed by someone, perhaps within a series of related competencies, connoting both a concrete category on which a person’s adequacy or sufficiency may be judged and that quality or state of being which characterises a person as being competent, able, adequate or sufficient within a category.

Short advances his claims by stating that the word ‘competence’ connotes a quality of being competent, and when one is said to have competence in some area, it means that one possesses this quality, though we do not know specifically what he/she is capable of doing. Thus confusion occurs when the word ‘competency’ is associated with that of a concrete category being more specific.

A person ignorant in a field may consider someone competent in that field to be an authority. Competency does not then describe a level of performance at which a person’s performance becomes commendable and judgements of competency become value judgements. As noted in the previous definition on competence, successful competency will be viewed subjectively depending on the competency of the teacher and the institution. In other words, perceptions are subjective and restricted depending on the perspective of the assessor. The saying “in the land of the blind, the one-eyed is king” captures the sense claims of what competency implies. In this circumvention competency seems to be unbounded, and lacks volume.

A table is provided below to summarise and tabulate the various views on performance, competence and competency. Thereafter, the researcher will now proceed to define and discuss Competency Based Education (CBE).

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<th>PERFORMANCE</th>
<th>COMPETENCE</th>
<th>COMPETENCY</th>
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<tbody>
<tr>
<td>Doll</td>
<td>Mechanical</td>
<td>Carries no value judgements</td>
<td>Propounds behaviourism</td>
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<tr>
<td>HSRC</td>
<td>Integration of knowledge+skills+values+attitudes essential in determining</td>
<td>Integrated application of capabilities within</td>
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<td>performance specific contexts.</td>
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<tr>
<td>Mansfield</td>
<td>Performable roles dependent on standards of competence and meaning attributed to competence.</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Chomsky</td>
<td>Performance (i.e. what a person does is influenced by many factors including attention, memory, non-linguistic knowledge and knowledge (largely unconscious) of grammar. The latter is referred to as 'competence'.</td>
<td></td>
<td></td>
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<tr>
<td>Piaget</td>
<td>Learning is framed in structural terms and comprises the 'structures of the whole' namely the sensory motor, pre-operational, concrete operational and formal operational stages. One may equate the 'structures of the whole' to a definition of competence as the abilities underlying and partially controlling performance.</td>
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<tr>
<td>Bruner</td>
<td>It is not differences in competence which conditions linguistic and intelligence differences but rather the social context. Therefore groups diagnosed as culturally deprived may have the same competence as those in the mainstream culture. Competence is internally and externally driven and this means one cannot rely entirely on...</td>
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the social context to
assess competence and
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<table>
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<tr>
<td>Noddings</td>
<td>Competence is presented in terms of potential, ability and aptitude.</td>
</tr>
<tr>
<td>Short</td>
<td>Capacity to perform generally and not specifically in a specific realm. Perceptions are subjective and restricted depending on the perspective of the assessor.</td>
</tr>
<tr>
<td>Pearson</td>
<td>Implies mastery of basic knowledge.</td>
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### 2.3.4 Competency Based Education and Training (CBET)

The competency-based movement has been around from about 1980 in the USA. Its origin, however, can be traced back to the 1920s, to ideas of educational reform linked to business models specifying outcomes in objectives. From the 1960s onwards the demand for greater accountability in education, emphasis on the economy, and greater community involvement in decision-making gave great impetus to Competency Based Education and Training (CBET). According to Tuxworth (1989: 11) it is widely agreed that CBE has its roots in teacher education. Crises in education in the USA in the sixties led to widespread demand for curriculum reform. At the time of CBET'S emergence, large investments of federal funds were being pumped into curriculum development. Also evident was a concurrent dissatisfaction with teacher training. Calls were made from the public for transparency in education coupled with accountability and the training of teachers.

The US Office of Education in 1968 promoted the genesis of CBET as a response to societal changes. Support was given in terms of grants to educational institutions to develop model-training programmes for pre-service elementary school teachers (Tuxworth, 1989). Characteristics of the models will be discussed later in this section. The model was intended to enhance the connection between teacher competence and pupil learning (Swancheck & Campbell in Tuxworth, 1989). What followed was that only competent teachers were allowed to enter the profession and certification, it was argued should focus on producing and verifying
competence. In order to evaluate or assess the potential of competency/performance based teacher education, the American Association of Colleges of Teacher Education published a paper, which served to clarify and establish the characteristics of Performance Based Teacher Education (Elam in Tuxworth, 1989).

By the 1970s, Competency Based Teacher Education (CBTE) had become a self-sustaining movement (Lindsey, 1976). A surplus of teachers made the pursuit for quality of paramount importance and enhanced strict measures in applying certification procedures. It is interesting to note that Spady (1977) objected rather to the pace, which was too slow than to the direction of change in teacher education. The mandating of CBET had profound implications for administration, resources and teaching methods.

Elam (in Harris, Guthrie, Hobart & Lundberg 1995: 18) offered the earliest definition of competency-based education, with the following essential elements:

- Competencies (knowledge, skills, behaviour) are to be demonstrated by the learner. These are
  - derived from explicit conceptions of the occupational role;
  - stated so as to make possible assessment of a learner’s behaviour in relation to specific competencies; and
  - made public in advance.

- Criteria to be employed in assessing competencies. These are
  - based upon, and in harmony with specified competencies;
  - explicit in stating expected levels of mastery under specified conditions; and
  - made public in advance.

- Assessment of the student’s competency. This
  - uses performance as the primary source of evidence;
  - takes into account evidence of the learner’s knowledge;
  - is relevant to planning for, analysing, interpreting or evaluating situations of behaviour; and
  - strives for objectivity.

- Demonstrated competency rather than time or course completion determine the learner’s rate of progress through the program.
The instructional program is intended to facilitate the development and evaluation of the learner’s achievement of specified competencies.

Several other characteristics were outlined, namely:

- Instruction is individualised and personalised.
- The learning experience of the individual is guided by feedback.
- The program as a whole is systemic.
- The emphasis is on exiting, not on entrance, requirements.
- Instruction is modularised.
- The learner is held accountable for performance, completing the preparation program when and only when, he/she demonstrates the competencies that have been identified as requisite for a particular professional role.

Elam (in Harris, Guthrie, Hobart & Lundberg, 1995: 19) added a set of seven related or desirable characteristics to CBE. They are as follows:

- The program is field-centred (work/skills).
- There is a broad base for decision-making regarding accountability (including such groups as college faculty, the students and the public).
- The materials and the experiences focus on concepts, skills and knowledge that can be learned in a specific instructional setting.
- Both teachers and learners are designers of the instructional system.
- The program includes a research component and is open and regenerative.
- Preparation is career-continuous.
- Role integration takes place as the professional gains an increasingly comprehensive perception of professional problems.

While Elam offers this description of CBE, Houston and Howsam (in Harris, Guthrie, Hobart & Lundberg, 1995: 19) summarise the essential features of CBE:

a. specifications of learner objectives in behavioural terms;

b. specification of the means for determining whether performance meets the indicated criterion levels;
c. provisions for one or more modes of instruction pertinent to the objectives, through which the learning activities may take place;

d. public sharing of the objectives, criteria, means of assessment, and alternative activities;

e. assessment of the learning experience in terms of competency criteria; and

f. placement on the learner for the accountability for meeting the criteria.

2.3.4.1 Competency standards

Views of competency vary within an input system and an outcomes system. What follows in Figure 2.3 is a comparison of the outcome approach versus the input approach suggesting that competence should be described in general terms and not only on individual attributes.

The Content and Standards Route to Competence

Developed by

| CONTENT |
| Developing from: |
| Consisting of: |
| INPUTS & PROCESSES |
| deriving from a focus on current activities and needs |
| LEARNING & ASSESSMENT |
| based on a view of competence which equals |
| the ability and of attributes of individuals (knowledge, understanding and skills) |
| which supports the strategic aims of a particular organisation |

Defined by

| STANDARDS |
| Defined by: |
| Consisting of: |
| OUTCOMES |
| deriving from a focus on future strategic capability |
| INDUSTRY STANDARDS OF COMPETENCE |
| based on a view of competence which equals |
| Role expectations – external to individuals (whole work roles) |
| which supports the strategic aims of a competitive economy |

Figure 2.3 The Content and Standards Routes to Competence (Mansfield 1989:29)
According to Mansfield (1989: 28) competence should be described in the following way:

- being able to perform whole work roles instead of merely specific skills and tasks,
- on respect of the standards expected in employment, that is not merely training standards,
- in real working environments, with all the associated pressures of real work.

In CBE, competence is about performance. The difference in CBET is that these are viewed in terms of occupational roles.

2.3.5 Outcomes Based Education (OBE)

As mentioned, during the eighties several Western countries (section 2.2.5) indicated a shift in the process of schooling from one based on inputs to one oriented to outputs. This is commonly called outcomes based education, a relatively new system of education.

2.3.5.1 William Spady’s Model

Dr William Spady is Director of the High Success Network in Eagle, Colorado, which he founded in 1986 to help educators, policymakers and communities implement OBE in their schools (Spady, 1994: 207). As mentioned earlier the main exponent of OBE is William Spady. He (1994: 1-3), states that “OBE means focusing and organising an education system around what is essential for all students to be able to succeed at the end of their learning experiences. This means starting with a clear picture of what is important for students to be able to do, then organising curriculum, teaching, and assessment to make sure this learning ultimately happens”.

Spady adds that the keys to an outcomes based system are:

- Developing a clear set of learning outcomes around which all of the system’s components can be focused.
- Establishing the conditions and opportunities that enable and encourage all students to demonstrate at the end of significant learning experiences.
- Outcomes are clear learning results that we want students to demonstrate at the end of significant learning experiences. They are not simply vague statements about values,
beliefs, attitudes or psychological states of mind. Instead, outcomes are what learners can actually do with what they know and have learned. This means that outcomes are actions and performances that reflect learner competence in using content, information, ideas and tools successfully. Outcomes should be observable. Finally, because outcomes occur at or after the end of a learning experience, it is useful to think of them representing the ultimate result that is sought from the learning activity. When the notion of an ultimate result is applied to the end of the student's career in school, rather than to particular segments of the curriculum, OBE uses the term ‘exit outcomes’. This gives all students and staff an ultimate target on which they can focus and orient their teaching and learning experiences”. Spady furthers his argument by stating that basing education on outcomes requires a move from the traditional time based framework. Essentially outcomes should take precedence over time. According to Spady (1994: 9), “OBE’s two key purposes reflect its underlying ‘Success for all students and staff’ philosophy”. They are:

- Ensuring that all students are equipped with knowledge, competence and qualities needed to be successful after they exit the educational system.
- Structuring and operating schools so that those outcomes can be achieved and maximised for all students.

Spady’s definition of OBE is based on three key assumptions:

- All students can learn and succeed, but not on the same day in the same way.
- Successful learning promotes even more successful learning.
- Schools control the conditions that directly affect successful school learning (Spady, 1993: 18).

These assumptions acknowledge differences in student learning rates and learning styles. They assert that successful learning rests on students having a strong cognitive and psychological foundation of prior learning success. Lastly, these assumptions imply that implementers of OBE, can direct and encourage all students to be successful learners. Spady consistently and consciously guides what they do around four principles, which are at the heart of OBE. The four principles, according to Spady (1993: 15-20), are:

- clarity of focus; (outcomes to be clearly defined)
- expanded opportunity; (providing practical support for learning success)
• high expectations; (abandoning streaming, curriculum tracking, and specific ‘ability groups’) and
• design down (working back from the end point)

Although Spady sees these four principles as essential, he regards ‘clarity of focus’ and the ‘design down’ principles as most important in transformational OBE. Further discussion of these follows.

The ‘clarity of focus’ principle leads to a number of objectives.

• Helps educators establish a clear picture of the learning they want students to exhibit in a performance demonstration.
• Reminds educators that student success becomes the top priority for planning, teaching and student assessment.
• Makes a clear picture of the desired outcome as the starting point for curriculum, teaching and assessment planning and implementation, all of which must perfectly match the outcome.
• Suggests that the teaching process in the classroom begins with the teacher sharing, explaining, and modelling the outcomes on day one and continually thereafter, so that the ‘no surprises class’ philosophy of OBE can be realised.

The ‘design down’ principle focuses on staff beginning their curriculum and teaching planning where they want students to eventually end up and work their way back from there (Spady, 1993: 19). This process becomes clear when we think of outcomes as falling into three broad categories, namely culminating outcomes, enabling outcomes and discreet outcomes.

According to Spady the term ‘culminating outcomes’ is synonymous with exit outcomes, or what the system wants all students to be able to do when their official learning experiences are complete. Enabling outcomes are the building blocks on which culminating outcomes depend since they are essential to students’ ultimate performance success. Discreet outcomes are curriculum details that are ‘nice to know’, but not necessary to a student’s culminating outcomes.
Several scholars have critiqued Spady’s Model of OBE. The researcher specifically refer to the criticisms of Malcolm (Australia) and Manno (USA). Malcolm (1999: 85), states that Spady’s choice of outcomes and the formation of an epistemology of outcomes are central issues. Spady has very little to say about learning theory, curriculum development, classroom organisation and teaching methods. Almost all inputs are left to the teachers’ professional judgement while all learning experiences and achievement should reflect the desired outcomes. Manno (1994: 6), in contrast, claims that “Spady’s exit outcomes are not only based on curriculum content but on the acquisition of knowledge, competence and orientations”. He states further that this implies “the ability to function successfully in life-roles such as being a consumer, a producer, a citizen... a life long learner”. In other words, learners are expected to “demonstrate those behaviours that denote a positive social, emotional, and physical well-being” (Spady, 1988: 6). Manno (1994: 6) asserts that “These two approaches to defining outcomes,...conflict seriously.”

Malcolm (1999: 85) argues that Spady uses outcomes rather to drive the teaching process rather than learning theories. A teacher-led presentation aimed to have students memorise body organs in a unit called ‘organ systems in the body’ gives the students no access to outcomes on creative thinking or working in groups. Students completing group projects on different organ systems and presenting their findings by dramatic role-play or illustrated flip charts does. If teachers want memorisation of labels, draw and practice might do, but if they want skills in creative thinking, group work and communication, they need more.

Spady advises teachers to ‘design down’ from culminating outcomes to programme outcomes, to unit outcomes, to lesson outcomes and then finally to teaching assessment.

Manno (1994: 22) strongly criticises the long list of outcomes, which are unclear, show, little concern for academic progression and “send no clear message about what knowledge, skills, and other understandings their designers expect children to master so that they can live, work, and compete successfully in the twenty-first century”. He is supported by McGhan (1994: 1) who states that “most exit outcomes express very general characteristics like those in a typical job reference letter: ‘works well with others’”.

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Malcolm (1999: 86), finds that Spady’s approaches, namely, traditional, transitional and transformational OBE, are hierarchical in that transformational OBE assumes the highest position and traditional OBE the lowest. Traditional OBE emphasises the acquisition of knowledge and skills in traditional subjects. Transitional OBE emphasises broad competencies such as problem solving and using technology. Transformational OBE reflected in statements such as: “Students should demonstrate that they are quality producers who can create products that achieve their purpose are appropriate to their audience, reflect craftsmanship, and use technology and resources” (Spady in Malcolm, 1999: 85). Spady (in Malcolm, 1999: 86) assigns value by the names he gives: traditional is old, transformational is new and the competence version is transitional, and the route is from traditional to transformational, not the other way around.

Malcolm (1999:86) asserts that “Spady calls his high form transformational because it requires the greatest change to existing structures and operations in schools and to the learning required for graduation. Beyond the advantages of clarifying the focus for teachers and students, allowing the community greater influence on what is learned, and providing for accountability (through public and transparent criteria for teaching and learning), his transformational OBE counters the charge ‘You have passed the tests, but so what?’ Spady’s answer, through his role performances, is that successful students are ready to assume their place in society as citizens, producers, lifelong learners, and community and family members. Achievements in subjects such as Science, Geography, Art and Mathematics, much that don’t relate to such roles, need to be questioned. It may be that they are simply in the curriculum for their own sake”.

Manno (1994: 22) states that “…transformational OBE actually makes accountability impossible…transformational outcomes are vaguely worded and show little concern for academic content. They describe mental processes such as attitudes, dispositions, and sentiments, behavioural and social outcomes rather than knowledge, skills, and other cognitive outcomes”.

2.4.1 Specific interpretations of Spady’s views in Australia and the US

Earlier in the chapter it was noted that political sectors contributed to the development and rise of OBE. Thus, setting out what a nation thinks all students should learn stems from a political exercise (see 2.2.4). This indicates society’s beliefs about schooling.
Spady endorses outcomes in terms of what students should be, but maintains that performance is sufficient for a definition of learning. Australian policy is embedded in terms of what students should know, but is fashioned on constructivist definitions of learning that move closer to student beliefs.

Spady’s role performances were criticised from all quarters for defining schools and outcomes in terms of what students should be like. Malcolm (1999: 88) asserts “because Spady derived his role performances and outcomes from a view of the future and students’ future roles, they criticised his approach as social engineering (or at least putting too many eggs in one basket) and deterministic, instead of seeing it as an attempt at student-centred planning”. The design down process moves from the end of school to the beginning of school, in other words, from role performances to lesson outcomes. Frameworks such as the traditional disciplines, children and their associated backgrounds, resources and ideas that have worked in the past are understated, since the outcomes assume the dominant role. Spady urges community input on the culminating outcomes, but is unclear as to who decides the school’s secondary frameworks. In the Australian model secondary frameworks are provided by the learning areas and policies on curriculum design, which are public and decided by government.

For Spady, the ‘culminating outcomes’ or achievements at the end of school, which prepare students for adult life, are viewed as the primary purpose of schooling. Schools develop subsidiary sets of outcomes (using the design-down principle), which serve as steps along the way. Spady regards these as exit outcomes, as being “en route” to the final performance.

In Australia the outcomes are openended. Learning is never complete but an ongoing process. There are no culminating outcomes that all students must reach. Instead, progressive levels of achievement are defined that serve as beacons in development. Outcome levels are not tied to grades, but describe achievement independently, thus highlighting the fact that students are at different levels (Malcolm, 1999: 90).

The Australian levels were derived from ideas about progression in the outcomes instead of end-points, that is, the levels were designed-up from beginning to end. The priority on educational development and designing-up connotes a focus on children, their immediate lives as well as their pending future (Malcolm, 1999: 90).
Outcomes-based education models in the USA were developed from mastery learning and behaviourism (Evans & King, 1994). For Spady, most schools journey to the culminating outcomes through a network of instructional units, each with its own prescribed achievement, as no student moves to the next unit until he/she has mastered the current one.

The Australian model, on the other hand, assumes that schools expect, not only that different students operate at different levels on an outcome, but also that any one student operates at more than one level at a time. Teachers design activities that cross-levels, as students are not expected to master one level before moving onto the next. Thus the teacher’s job is to decide which level best describes the student’s progress and not whether the student has mastered a particular level.

In the USA model the statement ‘nobody fails’ connotes that the student can always have another opportunity to demonstrate the required performance. In Australia ‘there has to be an outcome’ applies, instead of the idea that nobody fails. Students completing a task will at some stage show some sort of progression.

Spady from his behaviourist position, views outcomes as demonstrations of performances, not thoughts, understandings, insights, beliefs, attitudes, not grades, numbers or attitudes. He distinguishes between psychological and sociological models. Psychological models of learning involve what happens inside the student’s head, while sociological models (which he advocates) involves the ability to translate mental processing into forms and kinds of action that occur in real social settings (Spady in Malcolm, 1999: 91). Outcomes must be of the sociological kind. Spady goes on further to say that, while what happens in the mind helps learning, what is essential to the outcome is behaviour. From this it seems that Spady hopes to achieve transparency in the assessment process.

Malcolm (1999: 91) claims that “the Australian view of learning is closer to a constructivist one in that learning takes place in the mind and expresses in many ways, of which performance is one”. What happens in the mind involves the cognitive, affective as well as social influences. Thus, the curriculum is viewed as subjective, not only in the way it is experienced, also but in what is learned.

It can be deduced that because learning takes place in the mind, assessment is achieved by inference and not by measurement. Performance is just an indicator of what and how students...
think and does not encompass the measures of learning. Behaviours in the Australian model are referred to as pointers.

The nature and role of continuous assessment is inconsequential to Spady. Spady regards performance of primary importance, while practice, though essential for performance, is of secondary importance. The Australian approach lauds practice as well as the end performance in continuous assessment. Practice and performance generate qualitatively different information, because they occur in different contexts. What students demonstrate during practice as well as in the final performance is authentic assessment.

With regard to grouping and promotion, both Spady (USA) and Malcolm (Australia) agree that no student should wait around, re-learning something he or she already knows. According to Spady students should move on to the next station as soon as they have mastered the current one. Three options are available:

- Instruction can be individualised, especially through the use of computer-based instruction and computer managed progress. Groups can be formed where appropriate, but the emphasis is individual. Classes and grades as such are irrelevant.
- Students can work in whole class groups (probably with their age mates), with loops of enrichment and corrective action available. The teacher teaches the whole class, and then conducts assessment. Students who need to do additional work move into a corrective pathway; others move into an enrichment pathway.
- Students are reassigned to groups as required so that they are always with their peers in achievement. Students work in groups, but as soon as they demonstrate the required learning they move on. The composition of the groups changes often, and age groupings are broken down. Further, since students might, for example, progress quickly in some units or learning areas but slowly in others, in any one week a student is part of a number of different groups (Malcolm, 1999: 92).

These alternatives allow individuals to move through the course without belonging to any particular group. A common problem is accentuated in the second alternative where slow learners are given priority over the more able student who is not given enrichment programmes. The problem of students failing to meet the standards a second time around is exacerbated by the range of abilities in a group that is too large.
The recommended strategy in the Australian system is to teach to incorporate two or three levels, so that every student in a class can work from his or her own level. Common interests are regarded as essential in class groupings, and thus pupils are grouped according to their ages.

Malcolm (1999: 93) differentiates between an OBE approach which is system-centred in the sense of the curriculum fitting into an operating school and a learner-centred approach which competes with subject-centred, teacher-centred, text-centred, and system-centred approaches. According to Spady (in Malcolm, 1999: 93) 'learner-centred' means that students move through units and tests at their own speed. This is aided by teachers finding methods that work for individual students, especially during corrective loops. In Australia, the requirement to teach across levels drives the curriculum towards flexibility, thus providing more scope for students to work in different ways. For Spady, learner-centredness is an input, which has little to do with outcomes, hence not much is said about it.

Outcomes-based education as a reform strategy, according to Spady (in Malcolm, 1999: 94), starts with an external system in that schools must accept the paradigm shift before reform begins. In other words, reform begins with structural change initially and then moves on to teacher change. The Australian approach commences with existing knowledge in the school. Priority is not focused on the outcomes of schooling, but on teaching for outcomes and working across levels. Thus reform begins with the teacher and then moves into structural change.

Spady's definition and theories offer much that is of value to the researcher, educator and educational organisations throughout the world. However, a close reading of his work shows that his definition of education exists in a vacuum with much inconsistency and misnomers. Firstly, the infrastructure environing OBE precipitates towards the outcomes of OBE instead of allowing the outcomes of education to ensue. Spady uses outcomes rather than learning theories to direct the learning process. It would appear that the acceleration of OBE at the expense of the learner is no different from traditional teaching, where educators had to complete the syllabus in a set time irrespective of the considerations of the various types of learners. Secondly, Spady fails to take into account the differences in values, beliefs and educational training of educators, how it would be determined and by whom, what is essential within an educational system for all students to succeed, without being biased. What may be deemed important by some would have little or no relevance to another. Thirdly, while it is agreed that it is important that learners are able to apply what they have learnt, far too much
emphasis seems to be placed upon practical application rather than the acquisition of
knowledge. Spady’s definition of OBE states that “outcomes are actions and performances that
reflect learner competence”. Competence is seen as a construct that is not directly measurable
(Mahomed, 1996: 5). This is further reiterated by (Christie, 1995:24) who defines competence
as a capacity that is not easily observable. It would appear that Spady is still functioning in the
traditional system as he uses the narrow definition of competence, which is to ‘embrace the
ability to apply skills, to perform a task, theoretical understanding of the task, and the ability to
transfer knowledge, skills and understanding to another context’ (Christie, 1995: 2). The broad
view of competence is that it should “include at least the knowledge and affective factors that
underlie skills acquisition and sometimes also include experience and the ability to transfer
competence to new contexts” (McLean, 1995: 23). While Spady mentions that students and
staff focus and orient their teaching and learning experiences towards the ‘exit outcomes’ at
the end of a student’s career, there appears to be no emphasis on learning as an ongoing
process. Fourthly, how would an educator who has been governed by a time-based framework
relax into flexibility? The extreme may be that an educator could become lackadaisical and
transfer or displace workloads to the next educator. While Spady envisages OBE as a
successful alternative, his approach does not address these issues.

2.5 EXPOSITION OF KEY COMPONENTS OF AN OBE APPROACH

Central to OBE is the curriculum, assessment, classroom instruction, teacher development and
quality assurance, which are discussed below.

2.5.1 Curriculum

The most traditional image of the curriculum stems back to antiquity at the several liberal arts,
usually divided into the trivium (grammar, rhetoric and dialectic) and the quadrivium
(arithmetic, geometry, astronomy and music). Historically the word ‘curriculum’ is equated
with the subjects to be taught. (Schubert 1986: 26). It derives from a Latin root meaning ‘race
course’. Many past and present educators regard the curriculum as standardised ground
covered by students in their race towards the finishing line (a diploma). Thus the curriculum is
perceived as a racecourse of subject matter to be mastered (Zias, 1976: 6 – 7). The term
‘curriculum’ is in fact often used with several meanings and offers a wide range of definitions.
The factors and implications that ensue regarding the implementation of OBE are critical.
The implementation of OBE requires a radical change from the traditional curriculum where learning content was divided into subjects, assessment was norm driven with emphasis placed on examinations, and work was regurgitated. OBE discards content coverage for outcomes that each and every learner has to achieve in time depending on the rate of progress and performance. "Outcomes signal what is worth learning in a content-heavy curriculum" (Jansen 1997: 108).

Thus a closer look at the curriculum in the following areas is essential:

- curriculum as subject matter;
- curriculum as a program of planned activities;
- curriculum as intended learning outcomes;
- curriculum as experience; and
- curriculum as discrete tasks and concepts.

2.5.1.1 Curriculum as subject matter

OBE calls for the implementation of learning areas and the exclusion of the traditional subjects. According to Schubert (1986:26), the exclusive focus on subjects does not account for other planned or unplanned activities. In fact, it only accounts for topics to be covered and neglects such important dimensions as cognitive development, creative experience and personal growth. Schubert states that unplanned aspects such as the student’s prior knowledge, student attitude about the subject and learning, teacher attitude and the manner of instruction, and students’ interaction with one another, are essential to what is learned. While it is agreed that there was a lack of integration in the traditional subjects and no room for incidental learning the researcher does not agree that OBE through the use of learning areas will change or alter the status quo. In fact, the focus on the attainment of specific outcomes could worsen the situation placing emphasis on achieving them.

OBE calls for the scrapping of the traditional syllabus. Instead of the government prescribing inputs through syllabuses and textbooks, they should prescribe outcomes and leave the design and selection of the curriculum to teachers (Malcolm, 1999: 79). While this seems the most sensible thing to do since teachers are the major stakeholders in education, it gives one the impression that they are passing the buck on to a majority of teachers who do not have much experience in this area. What could arise is that teachers become biased in their selection of subject matter and only teach what they deem to be essential. Subject matter that they regard as
inconsequential will be left out of the curriculum altogether, thus further impoverishing the learner.

2.5.1.2 Curriculum as a program of planned activities

Anyone who has passed through a teacher education program acknowledges that the planning and preparation of lessons and activities are central to teaching. Lesson plans often follow a sequence of aims, objectives, procedure, materials needed and evaluation. This is still the case today, except that OBE employs a new set of terms to replace the old in planning and preparation. They are critical outcomes, specific outcomes, range statements, performance criteria, assessment criteria, and so on. OBE, like traditional teaching, requires that all activities for the delivery of students be planned in advance. However, from the researcher's own teaching experience and also the experience of fellow colleagues, we have realised, as have teachers throughout the world, that although teaching requires written notes, much teaching is based on a curriculum of unwritten plans.

Acknowledging the fact that plans have purposes for which the activities are the vehicle, in reality it is the activities themselves that students do, which form the curriculum. According to Schubert (1986: 28) "To characterise curriculum as planned activities is to place major emphasis on outward appearance rather than inner development". In OBE, the planning and preparation towards outcomes neglects the learning process. Schubert adds that "...emphasis on activities implies that more careful attention should be given to ends than means". It would then appear that there is a danger in only working towards the attainment of pre-planned outcomes. Room must be made for unexpected deviations when teaching.

2.5.1.3 Curriculum as intended learning outcomes

According to Spady (1994; 1997) the choice of outcomes and the creation of an epistemology of outcomes are central if not the only issues, in OBE. OBE shifts the emphasis from means to ends. Essentially what happens is that a structured sequence of learning outcomes is planned and all activities in the class are focused on the acquisition of specified ends. As Schubert (1986: 28), states, "intended outcomes are not precisely equated with curriculum; rather curriculum is the realm of intentionality that fosters the intended learning outcomes". The purpose of intended learning outcomes, notes Edley (discussion: 1998) is to not only know in advance what learners are expected to achieve but also to explain explicitly to them what they are expected to achieve.
The focus on the intended learning outcomes draws the attention away from the unintended outcomes. However, while many or all students in the class may demonstrate the acquisition of the intended outcome, the acquisition differs from student to student. Thus there is no surety that the acquisition of the outcomes or skills will be effectual. This is further reiterated by Schubert (1986: 29) who claims that “knowledge that helps one student when it combines with the rest of his or her cognitive and affective repertoire may be enlightening, while the same intended learning outcome may indeed be harmful to another student”.

2.5.1.4 Curriculum as experience

A major criticism of the subject curriculum is that it has given inadequate consideration to the needs, interests, and experience of the students (Zias, 1976: 402). Zias claims that the mastery of subjects was the central aim of the subject design and only students whose experience and interests meshed with the subjects tended to profit meaningfully from the curriculum. OBE seems no different in that it is no longer the mastery of subjects that is essential but the mastery of outcomes.

“The idea that the curriculum should be a set of activities or predetermined ends was resisted” as early as the times of John Dewey (Schubert, 1986: 30). John Dewey advocated a means-ends continuum, which implied that means and ends are inseparable parts of the learning experience (Archambault, 1974). Reflection and continual striving based on one’s experience to anticipate and assess the outcome of one’s thought and action positively, require an evolving curriculum that centres around and incorporates the needs of the learners from their various backgrounds and experiences. “Curriculum as actual learning experiences is an attempt to grasp what is learned rather than to take for granted that the planned intents are in fact learned” (Schubert 1986: 30). In other words, curriculum is meaning experienced by students, not facts to be memorised and behaviour to be demonstrated. Whenever change occurs in the student, teacher, subject matter and milieu, the curricular consequences change, thus acknowledging the learners experience and invariably uniting the ends and the means.

Although the ideal situation would be to take into account the needs and experiences of each and every learner in the class, it is virtually impossible, considering the large number of learners in the classes.
2.5.1.5 Curriculum as discrete tasks and concepts

According to Schubert (1986:31) "the curriculum is seen as a set of tasks to be mastered, and they are assumed to lead to a prescribed end". As in Spady's definition of OBE, the end or outcomes have specific behavioural interpretations such as learning a new task or improving on an old performance that was not successful. This type of thinking seems to be associated with CBE in the private and business sector. Education is thus reduced to a mere reproduction of tasks and skills. Schubert proceeds to say that learning tasks in a mechanical way is very limiting and while the completion of successful tasks may produce skills well learned, it might not produce variation that is so essential in the global economy. Thus the production of tasks and concepts cannot be viewed in isolation.

2.5.2 Assessment

According to Mitchell (1989: 60), "Assessment is the process of getting hold of evidence by one or a number of means and making judgements of the evidence in order to make inferences about an individual's competence". The following definition (Payne, 1974: 524) is more specific and descriptive: Assessment is a broad category that encompasses measurement and evaluation. It involves consideration of the value judgements (evaluation) in the context of the pupils' environment. Environment is used here in its widest sense to include not only the physical element but also the social, economic and psychological pressures experienced by the pupil. According to Nitko (1994) assessment is defined as 'a process for obtaining information that is used for making decisions about students, curricula, programs and educational policy'.

Figure 2 shows purposes related to educational assessment. A branch of the figure associated with decisions about students is further elaborated on to show several categories of decisions such as decisions about managing their instruction, placing them into special educational programs, and selecting them for further educational opportunities. The figure elaborates the managing instruction decision category to identify more specific decisions for which teachers need assessments, including planning instruction, placing students into learning sequences, and assigning final grades or marks (Lucen, 1998).

The term 'assessment', then, refers only to the process of gathering relevant information, not to the instrument for gathering it. (Lucen, 1998). The proper method or procedure for gathering information is best decided on by examining the purpose for which the information will be used and the type of student performance one is most interested in assessing. There are many
formal and informal ways a teacher may use to gather information. These depend on what for and why the teacher wants to use the information.

![Diagram of Assessments]

**Figure 2:** Schematic representation to show examples of types of educational decisions for which assessments may be used  
(Lucen 1998: 17)
According to Lucen (1998: 14), assessment may be internal and external. ‘External assessment’ may be defined as an assessment procedure (tests, examination etc.), which is set and controlled by an outside agency, usually by an examining board or the education department itself. ‘Internal assessment’ may be defined as an assessment procedure set and controlled by teachers at school.

Lucen (1998: 14) adds: The assessment results may be used for formative and summative purposes. A teacher uses assessment results formatively to guide teaching and learning and not to give final marks or grades. A teacher uses assessment results summatively when a more formal description of what the student has learned is required for official purposes. The different uses of assessment require information about different aspects of a student. Each aspect requires a teacher to use different methods of gathering that information. Some assessment methods may be formal, others may be informal.

2.5.2.1 Continuous assessment

Pahad (1999: 249) claims that “Continuous assessment is not a precise concept, but merely a general description of an approach which is designed to encourage learners to develop and demonstrate competence in a variety of ways and across numerous contexts throughout the learning programme”. According to Lemmer (1999: 8), “Traditional assessment practice in South Africa privileged summative assessment”. The implementation of OBE heralds the use of a variety of assessment strategies with emphasis on formative assessment “so that learners’ achievements can be recognised and future action planned” (Lemmer, 1999: 8).

The term ‘continuous assessment’ is thus loosely used to emphasise the shift from a judgemental approach on behalf of the education establishment to a developmental approach in which the teacher and learner work together to improve performance (Pahad, 1999: 249). It is a gradual ‘build-up’ of cumulative judgement about performance (KZN circular 3/95 and 10/95). Continuous assessment can be viewed as a formative evaluation procedure concerned with finding out, in a systematic manner, the overall gains a pupil has made in terms of knowledge, attitudes and skills after a given act of learning experiences (Ogunniyi in King, 1994).

It may consist of a variety of measures and procedures that a teacher can use to tell whether his or her instruction has been effective and to target those students who have and have not
mastered particular skills. Reddy and Le Grange (1996: 18-20) define ‘continuous assessment’ as an evaluation of the whole child, over a longer period of time, which assesses a variety of skills and abilities wider than what is possible with conventional testing.

“Formative continuous assessment provides the teacher and students with information that guides learning daily. Summative continuous assessment, on the other hand, provides teachers, students, parents and school officials with information that they may use to draw conclusions about how well a student has attained the learning outcomes” (Lucen, 1998: 18). Both formative and summative continuous assessments are essential in OBE.

“Formative assessment may be formal and informal. Informal formative continuous assessments consist of a teacher’s casual impromptu observation and impression of students’ progress in relation to the curriculum. Some assessment techniques teachers use for formative guiding of instruction include (a) reviewing homework for errors and misconceptions; (b) observing students as they read, work in groups, carry out assignments, or solve problems; (c) conversing with students to determine whether they understand a concept, and (d) listening to student responses during a lesson” (Lucen, 1998: 18)

Formal formative continuous assessment (Lucen, 1998) does not exclude the use of paper and pencil or performance assessment. Assessment may be done after each unit of learning to guide teaching of the next. Thus, instruction-orientated continuous assessments may be formal structured tasks or informal unstructured and impromptu tasks. Summative assessment, by contrast, is more formal. For formal summative continuous assessment, since the results become part of the students accountability system, the techniques a teacher uses need to be crafted with care to be aligned with the curriculum. The techniques a teacher may use are tests, quizzes, systematic marking of projects a student completes, products a student creates and end-of-term or end-of-curriculum-driven-referenced assessment.

OBE argues for the assessment of many dimensions of performance and for reporting them separately. A particular performance, whether a test, a project, or behaviour as a team member, has to be analysed in relation to relevant outcomes and whatever learning is demonstrated (Malcolm, 1999: 81). It seems that OBE is accompanied by two different approaches to assessment namely, atomistic (Swezey) and holistic (Hager) forms of assessment. According to Swezey (1998: 40), focus should be on single outcomes, in other words each objective should cover a single task only (and not a combination of tasks). Swezey furthers this, by
stating that in order to make an assessment one has to identify or classify a particular piece of behaviour and then use that as a criterion by which to judge if a learner has achieved a specific outcome. This view is regarded as atomistic, since it looks at assessment as bits or items. Like Spady, Swezey believes that each item is a specific outcome, which can be measured and observed, once again highlighting the Behaviourist theory. A demonstration of successful performance infers competence within an atomistic understanding of assessment. Understanding the relations between the bits and performing tasks that require an integration of skills, understanding and attitude is not required.

Swezey (1998: 50) also acknowledges the use of criterion-referenced testing. He believes that in order to develop a valid criterion reference test, which is based upon adequate performance objectives, a thorough task analysis is a necessary prerequisite. This task analysis enables identification of the critical elements required for successful task performance and provides for analysis of the appropriate tasks. In order to develop an adequate criterion-reference test, a developer much have access to task information on:

- required skills and knowledge;
- necessary performances that must be accomplished;
- criteria associated with each performance that is identified;
- conditions under which each performance must be accomplished.

While Hagar agrees with Swezey’s approach to assessment in that one should observe and assess performance, he disagrees with Swezey’s atomistic way of doing things (Hager, Gonczi & Athanasou, 1998: 55). Hagar adopts the holistic approach to assessment. He believes that outcomes should be integrated when assessed, and that then only can one infer the competence of a learner. Assessors should also assess complex outcomes which cannot necessarily be observed with the naked eye, for example, conceptual understanding. Such non-observable outcomes must be inferred from observable performance. It also means that assessment must include a number of tasks, not just observation. The integration of the required knowledge, skills and values is essential in holistic assessment. According to Van Rensburg (1998: 93), A learners level of attainment can be best estimated from four finds of observations and judgements namely:

- holisistic rating
- analytical rating
Spady (in Malcolm, 1999: 89) distinguishes between performance and practice. Reflecting, inferring and analysing are all aspects of practice that prepare for performance. The final performance, not the practice, is what matters. Since performances are required at the end of each unit, continuous assessment addresses this series of exit performances more than the daily activities that are part of teaching. Since all schooling is directed toward the culminating performances at its end, every assessment can be called formative only.

This movement towards continuous assessment raises the question of the efficacy of the traditional method of student assessment, i.e. formal examinations. The traditional paper-and-pencil method of assessment, which has been the backbone of evaluation systems throughout the world is now being put squarely under the spotlight (Lucen, 1998: 21). Critics have drawn attention to the unreliability of 'one shot' final examinations for measuring achievement (Edgewood, 1980, Starr, 1970). According to Lucen there, a number of disadvantages in examinations.

i. Disadvantages of examinations

a) Assessing with paper and pencil does not give a clear indication of a pupil’s all-round development as it often deals with specific cognitive skills. Objectives concerned with attitudes, skills and personal qualities are largely ignored (Broadfoot, 1986; King, 1994).

b) It gives invalid information about the learner’s progress if those taking their examination have poor language skills (Lien, 1976).

c) There is the danger that the objectives that are tested in the examination will be over-emphasised in the teaching at the expense of others (Broadfoot, 1986; Satterly, 1983).

d) It intensifies nervous strain of the individual at examination time. In studies conducted by Carswell, Primavesi and Ward (1987) it was found that clinical examinations are stressful to the student.
Given these disadvantages, alternatives have to be found and the only alternative practice at present is continuous assessment (Lucen, 1998).

**ii. Advantages of continuous assessment**

a) Continuous assessment allows one to assess and report a wider range of student achievement in a number of diverse tasks and through a variety of styles e.g. projects, oral tests, portfolios and assignments. (KZN Circular 3/95 and Circular 10/95).

b) Continuous assessment is intended to cover a wider range of skills than traditional written examinations. These skills may span cognitive, affective and psycho-motor domains (Pennycuick, 1994).

c) Continuous assessment enhances the teaching and learning process and provides ample scope for exploring the curriculum more fully (KZN Circular 3/95 and Circular 10/95).

As there are many more advantages associated with continuous assessment as opposed to formal examination, the researcher is unable to deal with all of them in their entirety. Although continuous assessment has been favoured as the alternative to formal examinations; it is not the panacea for all ills.

There are various problems that confront teachers in the implementation of continuous assessment in schools, namely:

a) Teachers do not have a clear understanding of its mode of operation (Pennycuick, 1990; Ali and Akubue 1988; Erinosho, 1993).

b) Teacher workload may be substantially increased by frequent testing, grading and detailed record keeping (Pennycuick, 1990; Erinosho, 1993, King and Van den Berg, 1992).

c) Administration of continuous assessment may not be straightforward. Consideration must be given to which measures are to be taken when pupils are absent for continuous assessment tests, or transfers from one school to another (Pennycuick, 1990).
d) There are also possible sources of unreliability in school based assessment. These include:

2. Teacher/Assessor bias i.e. assessment can easily be contaminated by favouritism, corruption and cheating (Pennycuick, 1990; Erinosho, 1993; Satterly, 1983; Ali and Akubue, 1988).
3. The less communicative student (the English second language speaker) is disadvantaged compared to the more outgoing student.
4. Doubtful originality of work i.e. since work is not done under examination conditions; it is difficult to be certain that work is the pupil’s own.

e) There is the major issue of comparability between classes in school and between schools.

2.5.3 Classroom instruction

An OBE approach requires drastic changes in both the roles of the teacher and learner as well as group work. It requires commitment and involves the creation of a culture of accountability (Pretorius, 1998).

2.5.3.1 The role of the learner

OBE requires a major change in the role of learners in that they are now expected to be actively involved in the learning process whereas previously they were passive recipients (Van Der Horst & McDonald, 1997). According to Harris, Guthrie, Hobart & Lundberg, (1995: 219) learners are now required to take much more responsibility for their learning. They argue “since many learners may not have experienced this to any degree in their previous education, care must be taken to introduce this approach carefully and thoughtfully”.

Spady (in Gultig, Lubisi, Parker & Wedekind, 1998: 25) is concerned with exit outcomes or words with ends, and allows freedom and flexibility in the way a learner achieves these outcomes. This implies that learners are allowed to choose their own learning styles, work at their own pace and essentially be self-directed. The researcher thinks it would suit a learner well who is intrinsically motivated and comes from a home environment that is conducive to
learning. A learner who is not motivated may adopt the learning style of the teacher or fall along the wayside.

Another point to consider is that while OBE allows for the learner’s choice of learning style it does not seem to provide sufficient autonomy since the learning outcomes are stated in terms of clearly specified objectives. According to Harris, Guthrie, Hobart, and Lundberg (1995:139), it might be argued that railway lines provide similar guidelines to trains. The train is free to go anywhere it likes, in theory; however it follows the train lines. At certain predetermined points choices are made for it, and it follows the lines it is sent down by others. The implication to be drawn from this analogy is that while there is potential for some autonomy in that the driver, here the teacher, could manually intervene and change the intended direction but only down a predetermined track. In other words OBE, could inhibit autonomy and self-direction.

2.5.3.2 Groupwork

According to Wilkens (1998: 68), “Groupwork is regarded as an integral part of OBE. The SAQA underlined the importance of group work in OBE in South Africa by proposing, as one of the seven critical outcomes that: Learners will work effectively with others as members of a team, group and organisation, and community”. Wilkens (1998: 69) asserts that there exists different criteria to group learners. They are as follows:

- Homogeneous groups: groups of learners of similar ability within a class (ability grouping)
- Heterogeneous groups: groups of learners of mixed ability (mixed social grouping)
- Grouping influenced by a learner’s interests, age, social maturity, gender etc.

OBE requires that learners be actively involved in-group work encouraging co-operative learning. “Co-operative groupwork occurs when learners in a group work on different learning tasks supporting a joint outcome” (Wilkens, 1998: 70). While this enhances interaction, socialisation and the solving of problems in a more meaningful way there are problems to note. Groupwork can enhance the social status of certain group members by way of their personalities, achievements, contributions and so on. This could influence the performance of introvert members of the group in a negative way. It is clear that the teacher will have an important role to play in guiding the learners towards this kind of learning approach as there
exists problems associated with poor discipline, the insecurity of learners and confusion amongst learners.

2.5.3.3 The role of the teacher

"Arguably the single most important factor in the success of an educational innovation is the staff" (Harris, Guthrie, Hobart & Lundberg, 1995: 215) since they are the ones who have to implement the new programs and support it. Thus the role of the teacher is essential in the successful implementation of OBE. "It is one of the ironies of OBE that a system whose motivation, in many countries, includes a wish to wrest education from teachers and make them accountable, depends more than ever on the professionalism and skills of teachers" (Malcolm 1999:82).

OBE moves away from a teacher-centred approach to a learner-centred one. According to Wilkens (1998: 72), many teachers previously and presently regarded their role as transmitters or instructors of knowledge while others interpreted their role as managing learners and their behaviour. In the traditional system of education of education, teachers were expected to work through a syllabus set by the various departments of education. Whether the syllabus was of relevance or suited pupils from the various cultural, social and cognitive levels were inconsequential. Teachers were time bound into completing the syllabus in a set time irrespective of whether it was grasped and beneficial to the learners. As a result the under achieving learner or the learner with learning disabilities was not given much consideration. In many cases the status of the teacher was judged by the results produced from the examinations written by learners. Thus many teachers were under extreme pressure to resort to various means in order to be deemed 'competent'.

In OBE, teachers are expected to become facilitators of learning. In other words, they are now expected to guide, assist and support the learner through the learning process. When learners are unable to discover or attribute meaning to certain concepts and subject matter the teacher will have to intervene and present explanations in a clear and interesting manner and not talk down to learners. According to Harley and Parker (1999: 187-188), teachers and learners 'work together' to achieve a common goal: achievement of the outcomes. This implies a profound shift in personal allegiances and loyalties from the positional emphasis of a mechanical solidarity and strongly classified curriculum to the interpersonal, weakly classified emphasis of an organic solidarity.
According to Spady 'all students can learn and succeed, but not on the same day in the same way' (Gultig, Lubisi, Parker & Wedekind 1998: 26). This implies that from the teacher is now expected to take into account the needs and considerations of every learner in the class. Where necessary, learning programs will have to be designed for learners so that every learner is accommodated. Teachers will no longer compare the abilities and results of learners against one another as in norm referencing. They will now compare the individual's performance against predetermined criteria. Thus assessment will be more detailed and intensive for the teacher.

Wilkens (1998: 44) maintains that 'reforming classroom management practices is a key issue' for teachers. Classrooms will have to be changed in interesting, stimulating, and challenging learning sites where teachers and learners share common resources'. Teachers will have to become innovative and creative. They will also have to learn how to manage their time in the classroom since the old, rigid timetables are of no significance in OBE. Furthermore, the integration of knowledge into learning areas means that teachers will now be expected to work in teams and to promote a co-operative culture of learning. Harley and Parker (1999: 187) states that it is ironic that at the same time, 'outcomes-based assessment promotes a solution-giving and task-oriented curriculum'.

Lastly, Harley and Parker (1999: 188) state that 'societies characterised by mechanical solidarity have strong boundaries between the inside and outside. In organic (differentiated) societies, there is a blurring of all symbolic boundaries. This implies that teachers will be held accountable to a variety of organisations and members of the community.

Thus it can be deduced that teachers throughout the world will require a 'mindset change' from their previous experiences of teaching.

2.5.4 Teacher training for OBE

Teacher training encompasses both pre-service and in-service training. These two concepts will be dealt with separately.
2.5.4.1 Pre-service training

Vocational teacher education has evolved out of older traditions of apprenticeship and craft training (Harris, Hobart, Guthrie & Lundberg, 1995). Harris, Hobart, Guthrie and Lundberg (1995: 151) go on to say that “such training engenders the belief that the content and skills to be taught are all the instructor needs and that teaching competencies will be developed as a result of learning” This implies that educational authorities have consciously and willingly placed instructors in the classroom with no wider qualifications than content knowledge and skills.

OBE emphasises the move away from an input, content-based approach to teacher education, to a process, competence-based approach (DOE, 1997h: xv). Teacher graduates will have to be empowered with a high level of skill, knowledge and social awareness in order to cope with the challenges posed by the process of global awareness (DOE, 1997h).

It can be concluded that educational authorities responsible for teacher training have to consider the following before they embark on a radical change of the curriculum:

- Competency-based education and training is being implemented with insufficient debate, critique analysis and success (Harris, Hobart, Guthrie & Lundberg 1995: 9).

- What are the necessary skills and competencies required for beginner teachers as opposed to experienced teachers? (Chapman, Radford & Hughes 1992: 2).

- Which teaching methods are essential for OBE?

- Re-examine their roles as academics.

According to Debling (1989: 84), vocational qualifications should encompass the following:

- Both employment related standards and other things of significance to the development of the individual. For example, matters pertaining to the use of leisure, role in society and so on.
- Things not required for immediate effective performance in the related occupation. They might be desirable to facilitate progression – progression at work, progression academically, or progression to a higher level of award.
- Skills in vocational qualifications should better prepare the individual to adapt and respond to unforeseen challenges in life.

It appears that the educational authorities throughout the world involved in pre-service training will have to reconsider their roles and development of the curriculum at large.

2.5.4.2 In-service training

In-service education of teachers is defined by Bolam (in Hofmeyr, 1991: 58) as “those education and training activities engaged in by primary and secondary school teachers and principals, following their initial professional certification, and intended mainly or exclusively to improve their professional knowledge, skills and attitudes in order that they might educate children more effectively”. This definition embraces a range of activities, from those focusing specifically on classroom competence to those which improve teachers’ qualifications and may or may not affect classroom practice.

The training of teachers and principals is of pivotal importance to the successful reform of education, especially since OBE is relatively new. However, there is a lack of understanding, according to many critics, about the reform agenda. Nowhere does Spady mention in any of his writings the direction that in-service training should follow. Training will thus differ from institution to institution depending on the level of understanding and commitment to OBE. Also trainers responsible for the inservicing of teachers may not have the necessary competence and expertise to conduct training. This could create disillusionment amongst teachers concerning the concept of OBE.

According to Harris, Guthrie, Hobart and Lundberg (1995: 152) evidence from a number of studies on CBE/T reveal that a number of educators do not enjoy the role that OBE ascribes to them. Educators are not comfortable with the role of a resource person. Harris and Hobart further state that in this system the educator is available to the learner as a resource when, and if, the learner requires that resource. In other words, the resource person is at the disposal of the learner.
The role of a resource person includes the following:

- being a source of information;
- being a means of motivation;
- assisting the learner to contract learning and develop learning outcomes;
- developing material and other learning experiences that are essential to the learner;
- administering the records of the learners’ progress, and
- assessing and evaluating

From various studies it was ascertained that educators are not comfortable with these responsibilities. Although teaching is often said to be an individual activity, it appears to be a misnomer in this instance because of the demands for uniformity of teaching. According to Harris, Guthrie, Hobart and Lundberg (1995: 153) “the need to give the learners a consistent message, overrides the autonomy which was so much part of a teacher’s rights”.

There is an important lesson to learn from the above. On the one hand, the message conveyed is that teachers need to be more professional to their calling by addressing and meeting the needs of their learners and not being preoccupied with their own personal needs. On the other hand, educational authorities dealing with in-service training will have to tread carefully and not further antagonise teachers about their ever-changing roles in society. According to Rosholt (in McGregor & McGregor, 1992: 169) “Compared to skilled and motivated teachers, buildings, desks and schoolbooks are easy to provide”.

2.5.5 Quality assurance

There seems to be no concise and unanimous definition of the concept ‘quality’ on which all educators will agree. Conceptualising quality has proved very difficult (Goodlad in Lemmer, 1998: 118). However, the researcher has decided to use the definition of Van der Horst and McDonald as it appears to be encapsulated in education, industry and the business sector like CBET. It should be noted at the onset that this concept emerges from the world of commerce and needs considerable remodelling for use in education.

‘Quality’ refers to the particular effectiveness or degree of worth of an object such as a garment or a car, or it may refer to the value or effectiveness of a practice such as a medical or a teaching practice’ (Van der Horst & McDonald 1997: 70).
Questions raised from this definition are as follows:

- How good is it? (quality)
- Does it meet the required minimum criteria?
- Are the customers satisfied with what they get?

‘Assurance’ in contrast to ‘quality’ refers to the act of making certain, in fact guaranteeing, the effectiveness of an object or a practice (Van der Horst & McDonald 1997: 70).

‘Quality assurance’ then refers to the act of ensuring that there is quality. In the educational arena emphasis is placed on the quality of education being provided. The introduction and implementation of OBE has become a major concern amongst educationalists and parents, as there is the perception that standards in education will fall.

The quality and standards of OBE have been the focus throughout this chapter through its examination of continuous assessment, curriculum development and classroom instruction.

Countries throughout the world are concerned about quality assurance in education and professional bodies are in place to ensure that it is given attention. In Britain this is institutionalised by the National Council of Vocational Qualifications (NCVQ), and in New Zealand by the New Zealand Qualifications Authority. South Africa has proposed a South African Qualifications Authority (SAQA). Quality is a key feature of current educational debates: quality schooling, quality assurance, quality management and quality audits which involve the analysis of institutional documentation, analysis of strategic areas such as design and review of programmes of study, teaching, learning and student experience, academic staff student assessment and so on (Lemmer, 1998: 117; DOE, 1997h: 150).

Education systems throughout the world have always had systems in place to advise, supervise and improve the quality of education. In South Africa, monitoring was done through inspection, however unpopular this may have been. Presently there seems to be no system in place, which relates to quality assurance for management or improvement. While Lemmer (1998: 117) mentions that quality procedures in the past were conducted in a top-down manner, this is still evidently in place. The implementation of OBE by bureaucrats in this country without considering the majority of teachers, and the expectation that they could implement
OBE without any support services and quality control, has serious implications for formal examinations as well.

2.6 CONCLUSION

The aim of this chapter was to make sense of OBE through a conceptual analysis of its guiding concepts. In so doing the researcher has discovered that although the terms ‘performance’, ‘competence’ and ‘competency’ mean different things to different people, they are all related and dependent on one another. For example, competence cannot exist without performance and vice versa. In the researchers opinion there are only two major distinctions between CBET and OBE. The first is that CBET emerged as a result of deficiencies in teacher education. Secondly, CBET seems to focus on occupational roles in the job market. OBE, on the other hand, emerged as a result of inadequate learner performance and competence for the labour market and economy. It focuses on learners in schools. The underlying motivation of both CBET and OBE is that though their focus is similarly directed, they target different scenarios with a common end result of accountability and achievement for the economy. Spady's definition and theories offer much that is of value to the researcher, educator and educational organisations throughout the world. However, a close reading of his work shows that his definition of OBE exists in a vacuum with much inconsistency and misnomers. Spady appears to place specific emphasis on the achievement of outcomes which should be observable in line with the behaviouristic view of thinking (cf 2.4.1). From this it would appear that Spady is still employing the traditional system of education as he uses a narrow definition of competence (cf 2.4.1). In other words, the achievement of outcomes is central to Spady. He offers no guidance whatsoever on key components of an OBE approach, namely assessment, teacher development, the curriculum, quality assurance, and so on. This is perceived to be an important shortcoming in his definition of OBE, as he offers no analysis of the key components mentioned.

The next chapter examines the education system and implementation of OBE in Australia.
CHAPTER THREE

OBE IN THE EDUCATION SYSTEM OF AUSTRALIA

3.1 INTRODUCTION

In this chapter some background is offered on the history of education and the introduction of Profiling, in essence the OBE approach, in Australia. The socio-cultural heritage, political system and economy of the continent are outlined showing the impact of these factors on education, its objectives, structure and administration. The chapter discusses the Australian Qualifications Framework and concludes with descriptions of the current status of profiles in Australia.

3.1.1 Geography

Australia is the only country occupying a whole continent, but characterised as an island. It is located between the Indian and South Pacific oceans southeast of Asia. Tasmania is an island to
the south of Australia. The area of Australia, including Tasmania, covers 7,682,300 sq km, making Australia the smallest continent and the sixth largest country in the world after Russia, Canada, China, the United States and Brazil.

A unique feature of Australia is the variety of landscapes, including tropical rainforests, the deserts of the arid ‘red centre’, snow-capped mountains, rolling tracts of pastoral land and magnificent beaches. Famous natural features include Uluru (Ayers Rock) and the Great Barrier Reef, amongst others (Microsoft Encarta Encyclopedia, 2000: no pagination).

### 3.1.2 Population characteristics

The inhabitants of Australia are scattered throughout the continent. However, ninety percent of the population inhabit only three percent of the land area because of climatic, environmental and socio-cultural factors. Eighty-five percent of the population is concentrated in urban areas, in suburbs and cities along the eastern, south-eastern and south-western seaboards and Tasmania. The remaining fifteen percent of the population is situated in rural settlements, running from Brisbane to Adelaide in South Australia and encompassed in the interior by the western edge of the Great Dividing Range. The remaining ninety-seven percent of Australia is uninhabited, with a population density of less than 0.03 people per sq km. Average densities reach 0.3 people per sq km in the semi-arid grazing lands where huge cattle and sheep stations are located (Microsoft Encarta Encyclopedia, 2000: no pagination).

Australia has a population of approximately 18.5 million inhabitants. Of these, approximately 3 million are school students, 700,000 are university students, and 1.4 million are students in vocational education courses (Killen, 1998: 1).

During the early nineties the population grew at an annual rate of 1.4 %. This was attributed to the high level of immigration of people in the childbearing and childrearing age groups. In recent times the percentage has decreased. The average life expectancy is about 82 years for women and 76 years for men. However, in the Aboriginal population it is much lower as a result of poor living conditions and diseases such as tuberculosis, diabetes and intestinal illnesses (Microsoft Encarta Encyclopedia, 2000: no pagination).
3.2 DEVELOPMENT OF THE EDUCATION SYSTEM IN HISTORICAL PERSPECTIVE

3.2.1 Education prior to 1901

Prior to 1901 Australia consisted of six self-governing states, which were really colonies of the United Kingdom. Free and compulsory education was advocated for all pupils of primary school age in each of these states (Louden & Browne, 1993).

3.2.1.2 Education after 1901

In 1901 the Commonwealth of Australia was established through the federation of the six states with each state gaining a certain amount of power and liberties. The Australian Constitution allowed each state to function independently. In 1901 the powers vested in the Commonwealth regarding education were very limited. In 1946 inserts were made in the Constitution enabling the Commonwealth to provide a variety of benefits to students in education. It is interesting to note that while the Commonwealth to date limits input regarding education, in each state education is funded through taxation collected by the Commonwealth. This is a unique feature of federal-state relations in Australia. While each state has the power granted by the constitution to levy taxes, including income tax, the Constitution also allows the Commonwealth to levy taxation in all the states on an impartial basis. However, a decision was taken that direct income tax be paid to the Commonwealth (Louden & Browne, 1993). Lastly, regarding funding, the Commonwealth Grants Commission gives the federal Parliament authority to grant financial assistance where necessary and may also recommend additional funding to states with circumstances which make the provision of government services more costly than others (Louden & Browne, 1993). This results in a levelling effect between states, which allows governments to provide proportionate levels of public service. The distribution of funds is a decision taken by state governments. The aim is to bring about similarity between the per capita spending of states on the services they provide. Education accounts for about a quarter of the state-government's expenditure in Australia.

The first schools established in Australia were non-government institutions, which continue to function today. These schools were divided into schools which charged substantial fees, and the parish schools run by Catholic school authorities, which charged low fees made possible by
the availability of members of religious teaching orders. Since the Constitution did not allow
the Commonwealth to offer direct financial assistance to non-government schools, grants were
made to the state authorities on condition that they were awarded to these schools. States were
willing to accept this responsibility since it reduced the demands made on them by non-
government schools seeking assistance (Louden & Browne, 1993).

Government schools, teacher unions and parents opposed the provision of state aid for non-
government schools. They believed that the government’s responsibility was towards
government schools and insisted that no aid be given until conditions improved in government
schools. However, state aid for non-government schools became policy (Louden & Browne,
1993). In later years a constitutional challenge was put forth by a group known as Dogs
(Defence of government schools). The crux of their challenge was that the Commonwealth
should not make any law for establishing any religion or for imposing any religious
observance. This is still evident in Australia’s present system of education where no religious
instruction in government schools is allowed. Few changes occurred in education during this
period. Changes that did occur are described below.

3.3 SOCIO-CULTURAL SITUATION

Malcolm (1999, no pagination) states, “Since European settlement in 1788, Australia’s social
and economic development has been dominated by European culture and aspirations”.
However, the disbanding of the ‘White Australia’ policy, which prevented Asian immigration
to Australia and which ended in 1975, succeeded in transforming Australia from an exclusively
European continent into a multicultural society. Contributing to multiculturalism was the
arrival of a large number of Italians and Greeks. A large percentage of the Aboriginal
community is still discriminated against and tends to live in community/settlements, which
deny access to the rest of the population. Ethnic groups in Australia comprise the following:
Caucasian ninety-five percent, Asian four percent and Aboriginal including other mixed groups
one percent. The federal and state government of Australia have made a major contribution in
advancing social services to people who are unemployed, widowed, orphaned, and so on.
Maternity allowances are paid to mothers irrespective of their income. A family allowance for
all children under the age of 16 is payable to the parent. Support services are also available for
the aged and disabled. The Royal Flying Doctor Service attends to people in remote areas who
are in need of health care (Microsoft Encarta Encyclopedia, 2000: no pagination).
English is the official language of Australia. However, provision is made in most schools throughout Australia for mother tongue instruction and the teaching of English as a second or further language (Department of Education, Employment and Training, 1992). Multilingualism is also strongly encouraged in Australian schools. The Australian constitution guarantees freedom of worship. While many people profess to be Christians, most are inactive in their faith, thus characterising Australian society as secular. Popular Christian denominations are the Roman Catholic and Anglican Churches, each catering for twenty-six percent of the total population. Christians of other denominations make up twenty-four percent of the population, with Jewish, Buddhist, Muslim and Eastern communities making up the rest (Microsoft Encarta Encyclopedia, 2000: no pagination).

3.4 THE POLITICAL SYSTEM

The Commonwealth of Australia is made up of six states and two territories. Their states and their capitals are New South Wales (Sydney), Victoria (Melbourne), Queensland (Brisbane), South Australia (Adelaide), Western Australia (Perth) and Tasmania (Hobart) (Lokan, 1997: xvii). The territories and their chief cities are the Australian Capital Territory (Canberra) and the Northern Territory (Darwin). The political history of Australia has been characterised to a large degree as racist through immigration policies, which sought to preserve a 'White Australia', and the poor treatment of the indigenous Aboriginal population. Directly or indirectly, political decisions were consequently taken by the various parties in office, which impacted on the educational system in Australia (Microsoft Encarta Encyclopedia, 2000: no pagination). As mentioned (paragraph 2.2.1.1), Australia was made up of colonies of the United Kingdom. Federation of the colonies was promulgated by the incursion of Europeans from the North and Asians as a result of the Gold Rush in 1850. Other developments during this period were the establishment of centralised trade unions across the colonial borders. Unstable economic conditions led to the formation of labour parties, which was to have a significant effect on education in later years.

3.4.1 Political developments after 1901

In 1901, two important things happened in Australia: firstly, it became an independent self-governing state and a member of the Commonwealth and secondly, an Immigration Restriction Act was established to exclude non-European settlers from Australia (Microsoft Encarta Encyclopedia, 2000: no pagination).
In 1905 a prescribed European language dictation test was introduced as an entry criterion for immigration into Australia. This policy of exclusion continued until the late 1950's and was abandoned in 1973.

While the formation of the federal government in 1901 made no specific provision for education, its expenditure to a large extent concerned the funding of universities and technical colleges. Government aid for non-government Catholic schools as a result of migration after the Second World War became a point of contention in the ruling party of the time, the Labour Party. The party split on religious issues and support structures for the Catholic non-government schools. Consequently, given increased demand, federal and state governments were compelled to provide assistance to Catholic non-government schools.

In 1941 Australia sought an alliance with the United States, as Britain was unable to support them. War then broke out between the United States and Japan. This resulted in major changes in education in Australia, arising from its realisation that it was dependent on the US for support. A Cultural Revolution followed in Australia. Relenting its laws on immigration by transporting immigrants to Australian suburbs made it more cosmopolitan in nature. Prosperity as a result of the war impacted positively on education, increasing the number of universities. The government provided free university education to those eligible (Microsoft Encarta Encyclopedia, 2000: no pagination).

The Liberal Party victory in the 1963 elections made an important contribution to non-government schools by providing per capita grants to assist with recurrent expenditure. However, these grants were not made available to government schools.

3.4.2 Federal governments' involvement in education

Until 1971 the federal government's involvement in education was confined to financial assistance. No evidence indicates that "it saw education as a central plank for government policy" (Louden & Browne, 1993:110). However, in 1972, victory over the Liberal Party by the Labour Party brought about major changes in education. The Labour Party, traditionally known as the party of the working class, viewed education as a means of reducing inequalities caused by socio-economic differences. Equal educational opportunities for all was the motto. During this period an Australian Schools Commission was initiated under the direction of Prof.
Peter Karmel to determine the financial position of government and non-government schools throughout Australia, and to make recommendations on the immediate financial needs of schools. The findings highlighted firstly, acceptable standards required in schools and secondly, the needs of handicapped and isolated children. Thus for the first time in the political history of Australia “it was clear that the federal government was interested not only in funding but what was also happening in schools” (Louden & Browne, 1993:111).

The Karmel Report demanded radical changes (Sedunary, 1996: 377) and made the following observations: firstly, there should be devolution of authority since most schools in Australia were centralised, it was felt that they should be given guidelines to operate more freely. Secondly, on the question of equality, it was felt that all children in Australia, irrespective of their ability or financial background, should receive an appropriate education based on equality. Thirdly, allowances should be made for alternative teaching methods to address the question of diversity for both teachers and learners. Fourthly, there should be an acceptance of duality of government and non-government schools. Fifthly, community involvement in schools to gain parental support should be acceptable. Sixthly, schools should be viewed as instruments to transmit skills, knowledge and social attributes for students.

The report also identified the following deficiencies in Australian schools: firstly, the differentiation of schools resulted in disparate resources, with the more disadvantaged being compromised further. Secondly, there were large numbers of untrained teachers. Thirdly, the curriculum was restrictive and unable to cater for the varying aptitudes and differences among learners. Based on these findings the Commission recommended that schools receive funds through block grants enabling them to spend in accordance with the particular needs and preferences of the school. It was also recommended that schools disadvantaged and lacking in resources received differential grants. Lastly, a number of recommendations were made to improve resources, general buildings, primary and secondary libraries, disadvantaged schools, teacher development and curricula (Sedunary, 1996).

3.4.3 Education in the 1980s

Despite a change in government in 1975, the Commission continued its quest to transform schools towards the end of 1980. The defeat of the federal labour government in 1975 curtailed educational reform in schools. Funding promised by the government of the day to non-government schools ceased as a result of Australia's economic position in 1980, with
widespread financial crisis and unemployment. To increase employment opportunities for the youth, to increase retention in secondary schooling and develop the skills necessary for the economic market, the federal government then introduced a 'school-to-work' Transition Program. Since the program spanned schools and technical colleges, it was administered by the Commonwealth Department of Education. The program was successful in achieving the following:

- Secondary education became a tool in the fight for economic progress.
- A positive relationship developed between secondary and technical colleges.
- The majority of the unemployed who had not progressed in traditional schooling, gained access to relevant courses.
- While the states had constitutional responsibility for education, policy initiatives and changes emanated from the federal government.

The defeat of the coalition Liberal-Country government by the Labour Party brought about further changes in education. This government concentrated on assimilating young people into the economy. Funds were made available for changes made in secondary schools. Equal educational opportunities were also envisaged for children not gaining the benefits of full-time participation in schooling because of cultural and socio-economic background. In 1984, budgets were earmarked for the development of computing in secondary schools. Once again it was the Commonwealth, which initiated this move, and others intended to improve the education of Aboriginal children (Microsoft Encarta Encyclopedia, 2000: no pagination).

The period 1985-1987 marked the beginning of an emphasis on outcomes rather than inputs. The concept of competencies began to feature in Australian schooling. Renewable funding was provided by the Commonwealth to involve states in providing outcome measures.

In 1987 the federal government was re-elected under the premiership of Bob Hawke, who restructured the ministries into smaller ones. Education was grouped with employment and training, reflecting a belief that Australia's prosperity was connected with highly educated and skilled workforce and that schools should play a central and critical role in economy and society (Microsoft Encarta Encyclopedia, 2000: no pagination). Thus a plea was made to the nation to strengthen its schools. The co-operation of states and territories was critical in the proposals made:
• The advancement of a clear statement on the purposes of schooling.
• The development of a common curriculum framework, which could be adapted for use in the various states and territories.
• The development of criteria for assessing the achievement of the curriculum objectives.
• A common approach to assessment and reporting to the various stakeholders.
• Improvement in teacher training.
• A retention of students in schools to year 12.
• The provision of equality and greater opportunity for under-represented groups.

These proposals, designated as “Profiling in Australia”, eventually became a reality in Australian schools (Lokan, 1997b: iii).

3.4.4 Present political situation

In 1996 the Labor Party’s 13-year reign of power was toppled by the new Liberal-National Party coalition under the John Howard. Significant changes made included acknowledgement of and compensation for the poor treatment of Aboriginal children. Findings in the Human Rights and Equal Opportunities Commission on the ‘Stolen Generation’ (1910-1970), describe the removal of Aboriginal children from their families and their placement with white families or orphanages in an effort to conform them to ‘white civilisation’. Since then, considerable funding has been allocated to Aboriginal education and arts. Plans at present include the restructuring of the Australian tax system by introducing a goods and service tax while reducing personal tax (Microsoft Encarta Encyclopedia, 2000: no pagination).

From this overview of the historical perspective, it can be deduced that education in Australia has been strongly influenced by the politics of the country.

3.5 ECONOMY

Australia is a member of the Organisation for Economic Cooperation and Development (OECD) of the leading industrialised nations. In 1994, its Gross National Product (GNP) was $320.7 billion US dollars, equivalent to 17,980 US dollars per-capita giving Australians the highest standards of living in the world. Ironically, however, its trade profile is similar to that of a developing nation exporting predominantly primary products and importing mainly
manufactured goods of various kinds. As a result, like many developing countries, the Australian economy is vulnerable to price fluctuations in the world commodities market, and to inflation in its main supplier markets (Microsoft Encarta Encyclopedia, 2000: no pagination).

The Australian economy is largely dependent upon mining, agriculture, manufacturing, forestry and fishing. Of these, agriculture and mining have played a central role in the historical development of Australia, although in recent years their central role in the country’s exports has significantly diminished. Agriculture now accounts for only 3% of the Gross Domestic Product (GDP) and mining for about 4%. In contrast, the manufacturing sector has grown rapidly since the 1940s and accounts for about 16% of GDP. The service sector is even more important and is in other OECD countries has grown since the 1970’s to about 14% of Australia’s GDP (1994-1995). The financial services sector is the single most important economic sector contributing 22% of GDP (Microsoft Encarta Encyclopedia, 2000: no pagination).

Prior to the 1970s Britain was Australia's major trading partner. Britain’s entry into the European Common Market in this period changed trading relations between these two countries, resulting in a slump in price for agricultural and mining products. Consequently, Australia revolutionised its economy by developing the manufacturing sector and establishing ties with South East Asia through education, trade and culture. This impacted substantially on schooling at all levels.

3.6 THE EDUCATION SYSTEM OF AUSTRALIA

Education in Australia is primarily the responsibility of the six states and the two territories (Marsh, 1994). The federal government is responsible for the funding of universities and colleges and the provision of education in external territories. Other responsibilities include student assistance, and educational programmes for Aboriginals as well as for learners from non-English-speaking backgrounds. The Australian school system is made up of government and privately owned schools. In order to maintain a high standard of education both in rural and urban areas, the government monitors all schools in Australia (Sloan, Administrarive Manager, Department of Education-Northern Territory, Interview: February 1999).

Schooling in Australia is characterised by 13 years of schooling, commencing with a preparatory year, followed by 12 years of primary and secondary school. Education is
compulsory between the ages of 6 and 15 in all states and territories except in Tasmania, where the upper age limit is 16. State schools provide free secular education. About seventy-two percent of children in Australia attend state schools, which are usually co-educational. There are many boarding schools in Australia. Children isolated from schooling systems or living in remote areas of the outback is catered for through Schools of the Air learning programmes and radio tuition. Teachers from the Schools of the Air also visit these children at least twice a year to make contact with them. Schooling is also provided at kindergartens and play centres for children from 2 to 6 years of age. Children unable to attend such centres are accommodated through the Australian Broadcasting Corporation.

3.6.1 Objectives of education

The common and agreed national goals for schooling in Australia have been substantiated by various interviews with Sloan, Administrative Manager, Department of Education-Northern Territory, January 1999; Bradburn, Educational Manager, Department of Education-New South Wales, February 1999; Dennet, Manager, Curriculum Development Department of Education-Victoria, March 1999). They are as follows:

- To provide an excellent education for all young people, which develops their talents and capacities to full potential, and is relevant to the social, cultural and economic needs of the nation.
- To enable all students to achieve high standards of learning and to develop self-confidence, optimism, high self-esteem, respect for others, and achievement of personal excellence.
- To provide a foundation for further education and training, in terms of knowledge and skills, respect for learning, and positive attitudes for life long education.
- To develop in students, skills of English literacy, numeracy, analysis and problem solving, information processing and so on.
- To provide students with an understanding of and respect for their cultural heritage.

These goals were slightly revised in 1998, placing greater emphasis on economic demands, information technology, vocational education, civics and citizenship education. Malcolm (1999: no pagination) confirms that the revised statement aspires to balance the idea that "Successful nations will be those which accept the opportunities that globalisation presents to schooling with the needs to provide the foundations for young Australian's intellectual,
physical, spiritual, moral and aesthetic development". Malcolm goes on to say that the revised goals are expressed through the new frameworks in the eight key learning areas of the National Profiles and Statements. He assumes that conflicts have arisen as a result of the need for full participation in the global economy, at the same time strengthening Australia’s national identity and culture.

3.6.2 Administration and control of education

As mentioned previously (cf 3.2), education is a responsibility of the various Australian states and territories. Thus administration and control is administered at local level through the authorities and Board of Studies, which monitor and plan curricula standards.

3.6.3 The educational structure

3.6.3.1 Pre-primary and primary education

Most states and territories in Australia have as part of their primary schools a preparatory year before the commencement of year 1. This year is referred to by different names in different states: K (Kindergarten); R (Reception), while others use T (Transition) and P (Preparatory). Most children begin a formal, full-time pre-primary year at age 5. However, the age at which children start pre-school varies across states and territories, but is usually 3. All territories and states have policies in place to make pre-school education available to all children. Nevertheless, there is no uniform or national policy on provision. Thus considerable differences exist in the administration, organisation and regulation of these schools. The state, churches, private sector and organisations also provide pre-schools in Australia (Malcolm, 1999: no pagination).

Pre-schools usually run half-day programmes, which commence at around 7:30 and end at about 12:00. These programmes encourage much parent and community involvement. The curriculum centres on enhancing the child's life and social skills (Malcolm, 1999: no pagination).
3.6.3.2 Secondary education

The participation rates in the compulsory years of schooling are approximately 95%, while the retention rates in the non-compulsory years of schooling are above 70% (Killen, 1998: 1). Malcolm (1999: no pagination) states “In spite of the similarities of context, purposes and problems in post-compulsory education in the different states, the politics of university selection, vocational education and direct entry to the workforce make close co-operation between states unlikely”. Thus, as noted, each state and territory has its own Board of Studies responsible for curriculum development, assessment procedures, and so on.

The Australian Qualifications Framework (AQF) is the new education and training system, applicable to all states and territories and which oversee the qualifications issued (Australian Education International, not dated). The Senior Secondary Certificate of Education (SSCE) is the general name for qualifications issued on completion of a full secondary education. States and territories have their own titles and requirements for senior secondary qualifications. For example, the Northern Territory calls the certificate the ‘Northern Territory Certificate of Education (NTCE)’ while New South Wales calls it the New South Wales Higher School Certificate (HSC). The certificate issued is a basis for selection into universities.

3.6.3.3 Vocational Education and Training in schools

Vocational Education and Training (VET) is differentiated in schools as opposed to work experience. According to the document, (Education and Training, not dated), “VET is industry-specific training with a nationally recognised outcome. The purpose of VET is to expose students at school to the world of work through career guidance activities and some sort of work experience. Parents, employers and students initiated the introduction of VET in schools, to not only prepare students for the working world but also to provide them with a sound general education”. VET in schools is based directly on national industry and competency standards, which involves real work leading to a nationally recognised qualification (Curtain & Hayton, 1995). The following stakeholders usually deliver the VET programs:

- Teachers.
- The school in conjunction with employees in a workplace.
- The school in conjunction with a Registered Training Organisation.
• The school in conjunction with a Registered Training Organisation, together with an element of learning that takes place in the workplace.

Students are also permitted to enter into a Training Agreement as a trainee or apprentice while continuing to study at school. At present, schools are attempting to get students to start their apprenticeship training before they leave school and complete the secondary school certificate simultaneously. It is believed that this will alleviate some of the pressure students undergo when making career choices. Allowances are also made for students to acquire VET qualifications through part-time employment with a formal training institution outside of school hours. In this way credits are achieved towards a senior secondary certificate or an accredited VET program within the school.

The opportunities for students to be productive and acquire skills are thus endless during the secondary schooling phase.

3.6.3.4 Preparatory programs

According to the document, (Education and Training, not dated) preparatory programs are courses which cater for those who want to:

• Return to study after a break from the education system.
• Improve skills in a specific subject as preparation for further study.
• Improve literacy, numeracy and basic education.
• Improve English language skills.
• Undertake an adult Senior Secondary Certificate.
• Complete short courses for job skills, for example, keyboard skills.

While some of these courses are awarded and accredited, others are not, depending on their purpose. The above courses are usually offered through TAFE colleges and community based centres.

3.6.3.5 Private schools

Approximately thirty percent of students in Australia attend private schools (Lawrence, Principal, Interview: February 1999). Private schools and church schools came into being well
before government schools in Australia. These schools are subsidised by the Commonwealth according to the level of fees they charge. Traditional English Grammar Schools, which usually charge very high school fees receive very little government support. Keeble, (Senior Teacher, Interview: March 1999) affirms that the Catholic Church is the biggest single provider of private schooling in Australia. From the thirty percent of students who attend private schools, twenty percent attend Catholic schools. Malcolm (1999: no pagination) affirms that these schools operate full systems in each state, which parallel the state systems. Fees in these schools are slightly higher than that of government schools. Other private schools are usually independent, often serving special religious or cultural groups, or simply the community (Clifford, Senior Teacher, Interview: February 1999).

3.6.3.6 Post Secondary Vocational Education and Training

The leading providers of vocational education are Technical and Further Education (TAFE) Colleges. Both vocational and non-vocational training programs are offered, ranging from basic employment courses, preparation for trades, and professions in recreation and leisure. Participants in TAFE programs range from 18 to 80 years of age.

Various writers (Louden & Browne; 1993, Mulcahy; 1996, Malcolm; 1999) assert that prior to major reform in vocational education in the late eighties, education was characterised by:

- Low productivity (manifest in an increasing balance of trade deficit, as income from primary produce fell away).
- Low skill levels in the workforce. (Much of the workforce, outside the professions, trades and technical areas, received little or no formal training beyond their years at school. Even where extensive on-the-job training occurred it was generally not recognised for the purposes of career advancement or pay).
- A workforce that was highly segmented. (Australia had a large number of small unions, based on their trade knowledge, rather than the industries in which they worked).
- Lack of skills in organisational development and management.

From many readings it appears that the advancement of vocational education emanated more from industry and unions than the education sector.
According to Killen (1998:6) “The majority of Australia’s vocational education courses, both in government institutions and in private training organisations, are now outcomes-based because of the mandatory requirement that they be competency based”. The vocational education system in Australia is state-based with separate organisations in each state accountable for the recognition and accreditation of education providers and programs. An Australian Recognition Framework (ARF) is in place, designed to produce an organised, high quality national training system, acknowledging and responding to the needs of industry. Thus courses also centre on the needs of the labour market, basic literacy, numeracy courses and bridging courses for job skills.

The ARF forms the basis of nationally recognised qualifications issued by nationally recognised training organisations. All qualifications are issued at one of the levels of the AQF (Killen, 1998). According to Killen (1998:6), “Skills and qualifications gained by people through accredited training in any state are recognised throughout Australia”. Training organisations in Australia must comply with minimum standards set out in the Australian Recognition Framework Arrangements (ANTA) in order to gain registration.

Since so much reference is made to the AQF and it appears centrifugal to education, the researcher thinks it is essential to discuss it under a separate heading.

### 3.6.3.7 Higher education

The impact of OBE in universities has been minimal (Killen, 1998). This can be attributed to the independent operation of universities in Australia with very little government control regarding curricula or teaching practices. Thus universities are free to determine what and how they teach. Education for teachers falls into pre-service and in-service training. Teacher qualifications throughout Australia are acquired through university instruction. Admission requirements are on completion of the year 12 certificate of education with at least a C average in English and a D in any other three study units (Monash University Handbook, 1999: 11) Courses offered at most universities prepare students to become early childhood, primary, secondary or adult and vocational education teachers. In-service training in Australia is provided for teachers through universities or courses held by the various Departments of Education throughout Australia. Incentives are provided for teachers to continuously further their studies and upgrade their qualifications by paying for their studies on successful completion of their programs (Whittiker, Principal, Interview: January 1999). Courses attended
by teachers during holidays for enrichment purposes can also be claimed back as a tax rebate. Furthermore, completion of a certain amount of study units entitles a teacher to one-year study full time with pay. Adult and community education is very similar to preparatory programs discussed in (paragraph 3.3.3.3). A distinct feature of this program is that it is non-profitable, and aims to meet the learning needs of adults. The Australian Education International (not dated) reports that Australia has over eighty years of experience in distance education as a result of the geographical isolation of many of its inhabitants. A wide range of courses is available through universities or TAFE institutions. The structure of the courses in distance education is the same as courses normally available for full or part-time study. Courses, which require a large amount of practical work, are not offered externally. Many of the courses require attendance for some reason or the other on weekends or around school holidays. Entry requirements are the same as for full-time courses. The courses are supported through a multimedia approach using printed materials, computer-based learning, “talkback” radio and other mechanisms.

Variations in distance education usually occur in the VET sector where flexi mode or multimode delivery is essential. This means that 50% of the course is taken by self-paced learning and 50% is by attendance at an institution. Education and Training (not dated) states that “Workplace Delivery is an alternative means of completing the off-the-job training”.

3.7 THE AUSTRALIAN QUALIFICATIONS FRAMEWORK

The AQF was introduced throughout Australia on 1 January 1995 and is being phased in over a period of five years. The AQF was established under instruction from state, territory and Commonwealth Education and Training Ministers. The AQF certifies qualifications on the basis of the knowledge and skills a person has achieved through various avenues. Furthermore, the AQF allows one to commence at a level suitable to the individual, and assists learners in planning their career paths. This is beneficial when one is moving interstate and overseas.

The AQF is a description of twelve national qualifications in schools; vocational education including TAFE, private institutions and higher education sectors, namely, universities. The twelve qualifications are shown in the table below.
TABLE 3.1 Australian Qualifications Framework (http://aei.detya.gov.au: no pagination)

<table>
<thead>
<tr>
<th>AOF Qualifications by Education Sector</th>
<th>University</th>
</tr>
</thead>
<tbody>
<tr>
<td>Schools</td>
<td>Doctoral Degree</td>
</tr>
<tr>
<td>Vocational Education and Training</td>
<td>Masters Degree</td>
</tr>
<tr>
<td></td>
<td>Graduate Degree</td>
</tr>
<tr>
<td></td>
<td>Bachelor Degree</td>
</tr>
<tr>
<td>Advanced Diploma</td>
<td>Advanced Diploma</td>
</tr>
<tr>
<td>Diploma</td>
<td>Diploma</td>
</tr>
<tr>
<td>Certificate IV</td>
<td></td>
</tr>
<tr>
<td>Certificate III</td>
<td></td>
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<tr>
<td>Certificate II</td>
<td></td>
</tr>
<tr>
<td>Certificate I</td>
<td></td>
</tr>
<tr>
<td>Senior Certificate</td>
<td></td>
</tr>
<tr>
<td>Certificate of Education</td>
<td></td>
</tr>
</tbody>
</table>

Figure 3.2 Pathway of the Australian Qualifications framework (http://aei.detya.gov.au: no pagination)
3.7.1 Features of the AQF

The AQF certifies the knowledge and skills a person has achieved through study, training, and work and life experience. A distinct feature of the AQF is that “Work-based qualifications and academic qualifications are now part of a single system, allowing maximum flexibility in career planning and continuous learning” (Australian Qualifications Framework).

Changes in vocational education have been effected in the following manner:

- Vocational qualifications are now industry-based, with special combinations of units of competency required by each industry for each qualification.
- Qualifications are designed in sequence, allowing one to move steadily from one qualification to the next. Units of competency are interconnected. Units accumulated are placed on record and help towards attaining job promotion etc.
- Assessment as competent for one of the vocational qualifications will have to show that one can use ones skills and knowledge under workplace conditions. One can also be assessed for the skills and knowledge already gained informally in previous work. This assessment process is known as recognition of prior learning.
- Registered Training Organisations (RTOs) are accredited to provide training and issue qualifications according to the requirements of the AQF.

3.7.2 Objectives of the AQF

The key objectives of the AQF are to:

- Provide nationally consistent recognition of outcomes achieved in post compulsory education.
- Develop flexible pathways which assist people to move more easily between education and training sectors and between those sectors and the labour market, by providing the basis for recognition of prior learning, including credit transfer and work and life experience.
- Integrate and streamline the requirements of participating providers, employers and employees, individuals and interested organisations.
- Offer flexibility to suit the diversity of purposes of education and training.
• Encourage individuals to progress through the levels of education and training by improving access to qualifications, clearly defining avenues for achievement and generally contributing to lifelong learning.

• Encourage the provision of more and higher quality vocational education and training through qualifications that normally meet workplace requirements and vocational needs, thus contributing to national economic performance.

• Promote national and international recognition of qualifications offered in Australia.

3.7.3 Accreditation

Education and Training (not dated) emphasises that “Accreditation is the process by which authorities give a course official recognition and ensure that courses are appropriate and of a high standard”. Universities in Australia operate under their own legislation, thereby regulating their own individual Acts. Thus the Acts grant them the authority to accredit their courses. As previously mentioned (par. 3.7) each state and territory has its own accredit training bodies. Accreditation assures the following:

• The contents and standards of a course are appropriate to the credential to which it may lead.

• The course and methods adopted in delivering it are likely to achieve the purpose for which it is being introduced.

• The curriculum, including assessment methodologies, will enable the achievement of the required competency and national standards where these are established.

Training and Further Education (TAFE) institutions, universities and private organisations also offer VET courses.

Private institutions constitute any structure other than those established or recognised as a university under an Act of Parliament. These institutions can only provide a course leading to a higher education award if the course is accredited under the Tertiary Education Act and authorisation is given to conduct the course.
3.8 CURRICULUM DEVELOPMENT

In the past 30 years, attempts have been made in Australia to promote a national curriculum for school education that is suitable for both the country and the students, rather than a range of curricula differing according to where one lives (Lokan, 1997b:3). National curriculum reforms were prompted by curriculum reforms in the USA and UK in the 1960s. Prior to the 1970s, the Australian State Department of Education prescribed the curriculum with minimal consultation and involvement of teachers (Brady, 1995). As a result, “School Based Curriculum Development (SBCD) emerged from a growing dissatisfaction among teachers with centrally determined curricula, and a belief that such curricula could not meet the widely varying needs and interests of students in different school contexts” (Brady 1995:181). The need for school and teacher involvement in curriculum development was widely expressed.

SBCD began in Tasmania and South Australia around 1968. Brady (1995:182), declares that by the mid seventies, “the policy of making teachers curriculum developers, as well as curriculum implementers, was firmly established in other states”. Thus the status of the curriculum from the state department changed from being prescriptive to offering guidelines. The federal government supported the changes towards curriculum autonomy. In 1975 a Curriculum Development Centre (CDC) was established to increase the effectiveness of curriculum development through joint co-operation, co-ordination and assistance. However, Brady found that individual teachers made most curriculum decisions in schools. In 1980 the Curriculum Development Corporation (CDC) published a discussion document called the ‘Core Curriculum for Australian Schools’ in an attempt to promote a national core curriculum. Brady (1995: 182) affirms that “the CDC remained in operation until its functions were superseded by those of the Curriculum Corporation in 1990”. As a result no one uniform model for developing the curriculum was practised. According to Brady, the most popular and persistent model used in curriculum development was that of Tyler which was referred to as the ‘objectives’ or ‘means-end’ model. Brady (1995:184), states that Tyler’s model was based on four central questions:

- What educational purposes should the school seek to attain?
- What educational experiences can be provided that is likely to attain these purposes?
- How can these educational experiences be effectively organised?
- How can we determine whether these purposes are being attained?
Brady reformulated and simplified the above by describing it in terms of curriculum events. They are:

- Stating objectives.
- Selecting learning experiences.
- Organising learning experiences.
- Evaluation.

He goes further to explain that the above events are sequential and that the first step is most critical as it leads to all the other steps. Brady (1995: 184) asserts that “the process of evaluation is the process of determining to what extent the objectives are being realised through the selected learning experiences”.

While the ‘objectives’ or ‘means-end’ model was most well known it appears that many teachers employed the interaction model (Brady, 1995). This model suggests that curriculum development is an interactive process, which can commence with any curriculum element and follow any sequence.

3.9 THE EMERGENCE/EVOLUTION OF OBE

It is widely affirmed (Killen 1998; Louden & Bowne 1993; Brady 1996; Sedunary 1996) that the impetus towards OBE “was a by-product of the competency-based training movement that had its roots in a desire of politicians, business leaders and educators to take a more national perspective on education”. Also, Australia’s need to produce a better-educated and more competent workforce for the global and competitive economic world led to educational reform. Killen explains that a further concern that prompted this education educational reform was the difficulty students were experiencing when they moved from state to state because of a lack of educational uniformity in curriculum development activities. This specifically led to changes in Vocational Education and Training (VET) and resulted in the formation of the Australian National Training Authority (ANTA), a National Training Framework (NTF) and a National Qualifications Framework (NQF) (Killen, 1998).

Smith and Keating (in Killen, 1998: 2) asserts that “Training reform in Australia has been driven by government and industry desire for a competency-based training system that would meet the needs of industry as a client and allow industry to lead VET in Australia”. This has
resulted in industry groups specifying their own competency standards, within which qualifications are awarded directly against assessment of competencies. Killen identifies 3 main features:

- The training focuses on outcomes.
- The outcomes are assessed against specified standards.
- The standards are defined by industry.

Killen concludes his CBT discussion by stating that the outcomes referred to in many of the VET documents describe observable actions and competency standards.

3.9.1 Motivation for an OBE approach

Killen (1998) argues that there are three reasons why VET and school education systems regard OBE as a suitable approach. Firstly, "clarity about outcomes as a prerequisite for well-focused planning" emanated at a time when both the business and public sector were receptive to the idea. Secondly, advocates of OBE suggest that if education were achieving predetermined outcomes then it would be successful not only in education itself, but also in the economy and future of Australian society. Thus the notion fitted in well with community pressure for accountability in education. Thirdly, it was hoped that the introduction of outcomes would provide some common base for discussions and curriculum development since the states never appeared to agree with one another on curriculum matters, resulting in different standards and problems for students moving from state to state.

This situation led to the development of the National Curriculum Statements and Profiles described in terms of key learning areas specifying what students were expected to learn at various levels of schooling, while the VET sector developed Key Competencies.

Killen (1998: 2) explains that "These developments were closely related to the Commonwealth Government's drive for national economic efficiency, which itself reflected a world-wide emphasis on accountability including calls for schools to produce measurable "outputs" commensurate with the public moneys invested in them". He states that another important step in the development of OBE in Australia was an agreement in 1990 between the State Ministers of Education and Training and the Commonwealth to collaborate in post-compulsory education and training.
The Finn Committee subsequently recommended that Key Competencies for work be developed. The Mayer Committee developed these Key Competencies, which were essential in preparing young people to enter the labour market. According to Killen (1998: 3), “this was an attempt to improve the employability of young people by enhancing their educational outcomes, promoting skills necessary to enhance Australia’s overall educational and economic competitiveness, and supporting the convergence of general and vocational education”.

The Mayer Committee initially identified seven Key Competencies and later added an eighth, as follows:

- Collecting, analysing and organising information – the capacity to locate, sift and sort information in order to select what is required, present it in a useful way, and evaluate the information itself and the sources and the methods used to obtain it.
- Communicating ideas and information – the capacity to communicate effectively with others using spoken, written, and graphic and other non-verbal means of expression.
- Planning and organising activities – the capacity to plan and organise one’s work activities, including making good use of time and resources, arranging priorities and monitoring one’s own performance.
- Working with others in teams – the capacity to interact with other people on a one-to-one basis and in-groups, including working as a member of a team to achieve a shared goal.
- Using mathematical ideas and techniques – the capacity to use mathematical ideas, such as numbers and space, and techniques, such as estimation and approximation, for practical purposes.
- Solving problems – the capacity to apply problem-solving strategies in purposeful ways, both in situations where the problem and the solution are clearly evident and in situations requiring critical thinking and a creative approach to achieve an outcome.
- Using technology – the capacity to apply technology, combining the physical and sensory skills necessary to operate equipment with the understanding of scientific and technological principles needed to explore and adapt systems.
- Using understanding of cultures – the capacity to recognise, appreciate and derive benefit from cultural diversity in the workplace and community.

Killen (1998:4) posits that the Key Competencies also have the following characteristics:
• Key Competencies operate as generic skills that can be adapted to different contexts.
• Key Competencies require the learner to, make decisions regarding what is being attempted, why it is being done and how best to do it, to demonstrate that it has been done and to reflect on what has been done in order to evaluate both the outcomes and the process.
• Key Competencies are interrelated and overlap they are not separate from one another.
• The development of Key Competencies spans the whole of life.

The introduction of Key Competencies into the curricula of Australian schools, Colleges of Technical and Further Education as well job training courses was supported by Australia's leading employer and business organisations. During 1994 to 1996 ways of incorporating the Key Competencies into schools and VET institutions and determining how they should be assessed and reported was piloted in all states and territories. It was hoped that the Key Competencies would be embedded in and developed through education and training curricula.

A pilot project carried out in New South Wales (NSW) attempted to identify the presence of Key Competencies by way of mapping educational and training documents, developing and trialing approaches to working with Key Competencies in terms of curriculum teaching, assessing and reporting, and devising strategies to facilitate the broader incorporation of Key Competencies into education and training. The pilot study acknowledged the importance of the Key Competencies. However Killen (1998: 5) asserts some caution about the findings of this study:

• Teacher’s perceptions of their current practice did not match reality. Teachers considered that they were already incorporating Key Competencies into their teaching to a greater extent than the mapping indicated.
• Teachers found working with Key Competencies as holistic entities quite challenging. A holistic approach also challenged the learners, as it required the ability to establish a sense of purpose, select appropriate strategies, implement strategies and evaluate both the process and the outcomes.
• Many teachers and learners are more comfortable with traditional teaching methods that do not require active learning and reflection.
Many teachers are more familiar and comfortable with normative methods of assessment than with the use of performance criteria.

There is no evidence to support a separate layer of assessment based on achievement of Key Competencies.

There is a need to further explore how appropriate combinations of learning experiences can help with the development of Key Competencies.

In spite of all the discussions and pilot projects, it is important to note that there are still many unanswered questions about Key Competencies and outcomes (Killen, 1998). The development of Key Competencies impacted differently on each sector of education in Australia (schools, vocational education, university). The researcher would prefer not to comment on the effect of Key Competencies in schools at this stage, as it will be discussed later in my findings. The other institutions will be discussed under their headings.

The Key Competencies document appeared when there was increasing dissatisfaction with Australian education in equipping students for a post-industrial economy. Prior to the 1980s, education in Australia focused on the child as a unique individual and concentrated on social justice. Teaching was input-oriented with emphasis placed on developing appropriate curricula and programs for each child, and reducing class sizes in order to cope with an individual student focus. This was well supported until the end of the 1970s when economic growth slowed down. “A paradigm shift from focusing on individual students as learners to an economics-driven concern with achieving pre-specified outcomes occurred in the 1980's” (Lokan, 1997b: 3). As a result, specified outcomes based on performance levels and benchmarks necessary for measuring performance entered the educational arena. Thus the support for greater curriculum control and accountability for education became the order of the day.

The developing of a national school curriculum was enhanced by the involvement of the federal government through its educational minister John Dawkins who saw national curriculum reform as a solution to major economic challenges.

Key stages of curriculum and assessment reforms are summarised in the figure below.
Table 3.2 Key Stages of Recent Curriculum and Assessment Reforms in Australia 1986 to 1993 (Lokan 1997: 5)

<table>
<thead>
<tr>
<th>Year</th>
<th>Description</th>
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<tbody>
<tr>
<td>1986</td>
<td>Australian Education Council (AEC) resolved to support the concept of a national collaborative effort in curriculum development in Australia to utilise to maximum effect scarce curriculum resources and to ensure that unnecessary differences in curricula from state to state be minimised'</td>
</tr>
<tr>
<td>1988</td>
<td>Commonwealth, states and territories agreed to work on national collaborative curriculum projects</td>
</tr>
<tr>
<td>1989</td>
<td>Australian Education Council (AEC) ratified a formal declaration of 10 common and agreed national goals for schooling in Australia (Hobart Declaration) Out of this agreement the AEC identified eight broad areas of learning and commissioned the writing of statements and profiles in each. These areas consist of The Arts English Health and Physical Education Languages other than English (LOTE) Mathematics Science Studies of Society and Environment Technology</td>
</tr>
<tr>
<td>1988 -1993</td>
<td>Statements were written for the eight key learning areas. The statements were written to define the learning areas of the curriculum identified in the agreed goals for schooling.</td>
</tr>
<tr>
<td>1990</td>
<td>AEC endorsed the development of profiles for English and Mathematics.</td>
</tr>
<tr>
<td>1992</td>
<td>Establishment of Curriculum and Assessment Committee (CURASS). The role of this committee was to initiate and supervise national collaborative curriculum development. This committee replaced the Australasian Cooperative Assessment Program (managing profiles) and AEC (managing statements).</td>
</tr>
<tr>
<td>1992</td>
<td>CURASS developed national ESL scales and the “Towards Level 1” section in the profiles.</td>
</tr>
<tr>
<td>1991 -1993</td>
<td>Consultation on the statements occurred at state and national levels. Consultation on, trialing and empirical validation (calibration) of the profiles and ESL scales occurred at state and national levels.</td>
</tr>
<tr>
<td>1992</td>
<td>Work samples were collected from states and territories for inclusion in the profiles.</td>
</tr>
<tr>
<td>1993</td>
<td>Statements and profiles were completed in their present form. AEC agreed that the publication of statements and profiles should be the responsibility of each state and territory.</td>
</tr>
</tbody>
</table>

These attempts at reform met with strong opposition from academics who objected to the lack of opportunities for consultation and felt that standards would drop and be forgotten. However, planning towards statements (curriculum content descriptions) and profiles (expected student learning outcomes) were completed in draft form and sent to the Australian Education Council (AEC) which comprised state and federal ministers of education and their chief executive officers for endorsement.

By mid 1993, state governments had become liberal, and the endorsements of statements and profiles came to a complete halt. The AEC then placed all decisions and responsibilities in the
hands of the various states for implementation and reform. "Thus the vision of a national curriculum for Australian schools was officially terminated, in one afternoon, in a decision that was unexpected in most quarters" (Lokan, 1997b: 6).

3.10 CURRENT PRACTICE OF OBE

The outcomes based approach in Australia is referred to as ‘Profiles’. The focus of attention has moved away from teachers to students (Haynes, Project Officer, Interview: 1999). Thus profiles focus their attention on what students are doing in relation to the outcomes of teaching and learning programs. This is achieved through profiling, which simply stated, means “monitoring a student’s progress by mapping it against a learning continuum within each 8 learning areas namely, English, mathematics, science, studies of society and environment, technology, the arts, health and physical education, and languages other than English which produce a set of achievement progressions referred to as strands” (Masters and Forster 1996: 10). Within each strand the curriculum for the learning area is described in four broad bands. They are referred to as 'A', 'B', 'C' and 'D' correlating to primary and secondary years of schooling. The expectation is that Band A corresponds with the lower years of primary school, Band B with the upper years of primary school, Band C with the junior secondary and Band D with the senior secondary. Each national profile contains the same strand as the corresponding learning years (Lokan, 1997b: 6).

For example, in mathematics the strands are number, measurement, space, chance and data, algebra and working mathematically. Each profile strand is divided into 8 levels, which span the compulsory years of schooling. Years 1-10 indicate the achievement and progression in student learning through a progress map. A progress map also describes the level of development and an area of learning, thus furnishing one with a frame of reference for observing individual growth. The underlying philosophy of profiling is that “it is possible to make assumptions about the way student’s learning will progress and that these predictions can be mapped as a learning continuum which describes the kinds of things students understand and are able to do” (Curriculum Chat (1): not dated).

The skills, understanding and knowledge that develop within each of the learning areas are referred to as outcomes in the profiles. Outcomes are known as pointers, which describe the level of achievement.
OBE in Australia adopts a differential approach in that students operate at different levels on an outcome as well as operating at more than one level at a time. This approach is based on the premise that since each child is different and reflects different ways of interpreting and exhibiting knowledge acquired, OBE enhances the accommodation of diversity of growth. As a result, Australia supports “Multi-age/Multi-level practices of teaching”. A definition of multi-age grouping is provided by Gaustead (1992: 3) who claims that it is the “practice of teaching children of different stages and ability levels together, without dividing them into steps labelled by grade designations. Children move… to more difficult material at their own pace, making continuous progress rather than being promoted once per year”. Hannon and Ashenden (1996: 27) affirm this claim “In reality there is no such thing as a homogenous group. No matter how you group students, even in pairs, they will learn at different rates, in different ways, with different emphasis…”.

The age range in most multi-age classes are at least two years. The grades are not combined for administrative convenience, not according to the rules in which separate teaching or learning programs are run. Multi-age grouping in Australia are that it focuses on each child’s stage of development rather than chronological age. Thus teaching activities are designed to incorporate cross-levels. Students operate in groups in which they also relate to past levels of achievement whilst concentrating on present levels. Mastery of one level is not seen as a prerequisite for progress to the next level. Teachers do not decide on whether learners have mastered a particular level but rather have to decide which level best describes the pupil’s progress. In Australia pupils are not regarded as having failed if they have not reached the required levels of competency (Curriculum Chat, (1): not dated). They are classified as having attained a certain level of competence even if it is not the required level. Learning expresses itself in many ways; performance is just one. Development of the learner’s mind is influenced by cultural, social and personal factors. Tests and assignments are seen as assessment indicators of learning and not learning in itself (Curriculum Chat, (2): not dated). The Australian approach adopts continuous assessment of pupils as a mechanism through which to assess levels of achievement. It is felt that what learners do during practice can reveal as much if not more about what they think in formal tests. Given the pressure and context within which performance tends to take place, the Australian model takes into account both practice and final performance when making an assessment of learners’ levels of achievement. The Australian system is predicated on the belief that no learners must work on a level that has already been achieved.
Benchmarks emanating from national goals set by ministers in 1996 state that “every child leaving primary school should be numerate and be able to read and write and that from 1998 every child commencing with school should achieve a minimum acceptable literacy and numeracy standard within four years” (McLean 1998:13). According to McLean, Assistant Manager, Curriculum (Interview: March 1999) profiling addresses what every child needs to know, and some that that learners leaving year 2 were without basics in numeracy and literacy, the national goal was to attain the above by 2002.

McLean asserts that benchmarks provide teachers with the minimum standards of teaching: “A major problem that has arisen throughout Australia is that teachers are now adhering to the basic minimum standards and not teaching above that level”. Since each state has its own assessment program and standards, the requirement of the Federal Government to compare achievements nationally, was virtually impossible to fulfil.

An attempt will now be made to narrate the lengthy steps the Northern Territory, New South Wales and Victoria took to implement Outcomes Profiling in Australia.

3.10.1 The Northern Territory (NT)

The Northern Territory has been involved in the production of 'Statements' and 'Profiles' for Australian schools, from the inception of this innovation (Jacob, Chief Project Officer, January, Interview: 1999; Sloan, Adminstrative Manager, Interview: 1999; Haynes, Project Officer: Interview: 1999).

'Mainstreaming profiling' asserts that the use of outcomes is essential in planning, programming, assessing and reporting. However “it does not mean that education will be outcomes-driven but that education will be informed by outcomes” (Jacob 1997: 56).

Mainstreaming of profiling in all schools in the compulsory years of schooling is administered through the curriculum, formulated by the Northern Territory Board of Studies.

The diagram below illustrates how curriculum development in the NT is influenced by Statements and Profiles.
Figure 3.3 Curriculum Development in the NT in Relation to Statements and Profiles for Australian Schools (Jacob 1997: 58)
3.10.1.1 Implementation steps adopted in the NT

Discernable steps were observable in the implementation process of profiling in the Northern Territory. However, it should be noted that some steps overlap. To assist the reader the researcher has set out the steps to enhance understanding.

Step one: Familiarisation with documents

Sets of statements and profiles for the NT were sent to all the various stakeholders in education, so that they could familiarise themselves with the documents. No implementation was required at all. The distribution of the documents elicited mixed reactions. Judgements were also clouded by mixed messages from various sources. Conflicting reports in the media about the use of the documents by the other states and territory added to the general alarm (Jacob, 1997: 59-60).

Step two: Workshops

Professional development soon followed through workshops conducted by profiling officers for teachers and office-based staff. The workshops were aimed at familiarising participants with the language and structure of the documents, and their relevance and aims of the documents, discussing school needs (Jacob, 1997: 60-61).

From the workshops the officers made the following observations:

- The implementers had to have adequate time to reflect on what outcome profiling meant in terms of philosophy, processes and practicalities.
- In order to increase the probability of change occurring in the direction required, it was important to know what attitudes, values and behaviours were acting as hindrances or facilitators.
- If too much was expected of teachers too soon, the officers might not achieve the stated outcomes (Jacob, 1997: 61).
While many teachers accepted the logic of profiling, the perceived volume of 'extra' work emerged as a concern. Furthermore, while some could see the benefits of an outcomes approach, others saw it as narrowing down the curriculum. Teachers believed that while the plotting of progression appeared attractive for its tidiness it did not reflect the reality of subject structures or student behaviour. Professional development consequently changed from a general introduction to the profiling of learning area based activities, focusing on English, ESL, Mathematics and Science and occasional workshops in the other learning areas. Workshops were organised on a semester basis (Jacob, 1997: 61).

**Step three: Publication of “First Steps”**

In 1995, “First Steps”, which is a literacy resource package for primary schools, was introduced as a resource in the NT to assist teachers in the implementation of the English curriculum. It is still used today, not only in the NT but in other states as well. However, problems arose as First Steps was not aligned to the English Profile, and the manageability of the requirements of both outcomes profiling and First Steps continue to cause concern (Jacob, 1997: 63).

**Step four: Support for the policy for the new curriculum**

In 1994 the Northern Territory Board of Studies made two major policy decisions in order to support the shift in the curriculum. Firstly, a pilot program incorporating professional development based on English and Mathematics in years T-7 would commence in 1995. Secondly, a mapping exercise was essential to establish the coverage of areas such as Technology, Health and Physical Education. Thirteen schools were selected on the basis of interest and commitment, 5 schools English, 2 schools piloted the ESL scales and 6 Mathematics.

The Pilot Program Handbook outlined non-negotiable aspects of the program (the system's needs) and options (the school's needs). Funding was provided for time release and the profiling administration; school based professional development, purchasing resources, group discussions, administrative costs etc.
The pilot program was aimed at assisting the Board of Studies in developing policy regarding the introduction and implementation of profiling which would also assist in contributing to national debate (Jacob, 1997: 64).

The piloting involved teaching the NT English or Mathematics curriculum, but assessment had to take place on the nationally developed profiles. One finding was that there was similarity between the outcomes identified in the NT documents and nationally developed profiles, even though their structures differed.

The pace of the program was monitored through response sheets, visits to schools, contact with senior and key teachers as well as monitoring the profile plan of each school. The first formal collection of the evaluative data from the pilot teachers indicated the following:

- Parents are not interested in lengthy information; they don't understand it and what educationists already tell them is adequate.
- Differences between levels and expectations in some learning areas for the same level are inconsistent.
- The profiling concepts and language was convoluted and was too difficult to read.
- It was inconvenient to handle several documents (nationally developed and NT documents); profiles should relate directly to the NT curriculum and even be in the same document.

Response sheets were sent out to the pilot schools. Teachers were expected to place their students at levels with their respective classes and were reassured that this would be considered an educated guess. This task required teachers to work together, discussing and comparing their understanding and interpretation of the outcome statements. While teachers felt that the response sheet enabled them to experience what profiling was about many were not prepared to assign a level to a student. A three-point scale was suggested for recording student progress, namely, beginning, consolidating and achieving. The achieving level was required for the response sheet.

The following reactions emanated after an interim evaluation and seminar for co-ordinators and key teachers of the pilot schools (Jacob, 1997: 66-67)
• Profiling involves a great deal of work for teachers; the work involved in assessment and record keeping would continue, but could be facilitated by appropriate systems and software.

• Focused work in one learning area, English or Mathematics, provides teachers with the opportunity to increase their understanding of assessment, programming and pedagogical issues. A superficial approach to all eight learning areas is not likely to produce the kind of changes profiling has the potential to effect.

• A paradigm shift of this nature takes a long time and much effort.

• Successful implementation requires a whole school approach involving senior staff and key teachers.

• The time involved in the change process needs to be recognised by teachers, schools and systems and planned for appropriately.

• More than 40 outcomes per level would be unmanageable for primary schools.

The language of the profiles, data to be collated and the volume of work involved were major concerns for many teachers. The general feeling of many teachers was that they needed support in assessing and judging 'levelness'. Further workshops were then conducted. The 1995 pilot program was deferred to 1996. The evaluation of this program was limited because of industrial action.

**Step five: Industrial action**

Towards the end of 1995, the Australian Education Union (NT) placed a work-ban list on profiling as part of its industrial action to seek improved working conditions. This had adverse effects on participation and the further implementation of profiling.

**Step six: Support for schools**

Jacob (1997), claims that 75 % of NT schools had received some professional development in outcomes based learning and profiling. The other 25 % comprised remote, non-urban, small schools, which were being reached through small school conferences, advisory staff and other mechanisms. Jacob noted that the pilot program was useful and that the recommendations of the teachers were as follows:
• The links between the curriculum and profiling of schemata used for monitoring student progress should be made clear and obvious.
• The number of outcomes should be made manageable.
• The timeline taken should be guided by the teacher’s suggestions.

i. Timeline for implementation

The timeline approved by the Board is as follows:

<table>
<thead>
<tr>
<th>Year</th>
<th>Level</th>
<th>Outcomes Profiles</th>
</tr>
</thead>
<tbody>
<tr>
<td>1996-97</td>
<td>Primary schools</td>
<td>Pilot mode</td>
</tr>
<tr>
<td>1998</td>
<td>English / ESL or Mathematics</td>
<td></td>
</tr>
<tr>
<td>1999</td>
<td>English / ESL and Mathematics</td>
<td></td>
</tr>
<tr>
<td>2000</td>
<td>At least three learning areas including: English / ESL and Mathematics</td>
<td></td>
</tr>
<tr>
<td>2001</td>
<td>At least four learning areas including: English / ESL and Mathematics</td>
<td></td>
</tr>
<tr>
<td>2002</td>
<td>Students will be profiled in all eight learning areas</td>
<td></td>
</tr>
<tr>
<td>1996-97</td>
<td>Secondary</td>
<td>Pilot mode</td>
</tr>
<tr>
<td>1998</td>
<td>Four learning areas including: English / ESL, Mathematics and Science</td>
<td></td>
</tr>
<tr>
<td>1999</td>
<td>All teachers will profile students in at least one learning area</td>
<td></td>
</tr>
<tr>
<td>2000</td>
<td>Students will be profiled in all eight learning areas</td>
<td></td>
</tr>
</tbody>
</table>

Step seven: NT outcomes profiles

The NT published its first draft on the Outcomes Profiles in January 1997 as a working draft. A few minor changes were made to suit the needs of the NT. Major priorities, which were addressed, were the inclusion of ESL learners in profiling because of the predominantly Aboriginal population, and the changing of the profiling document to make it user friendly for non-specialists. The establishment of the NT Outcomes Profiles set the scene for the cross-curriculum mapping of learning areas, cross-curricular subjects and principles to occur. No
plans have been made to accommodate the key competencies in the development of the NT curriculum to year 10. A match between the curriculum and the profiles is a long-term aim of the NT. It is also hoped that the limitations of profiling will not dictate the curriculum and that the outcomes of the curriculum should be based on profiling. The teachers already feel under pressure and the inconsistencies related to profiling have added to their woes. (Haynes, Project officer, Department of Education-NT, 1999: interview) asserts that “there is real danger that pressure on teachers that they should be seen to be implementing today's agenda will lead to superficial change which, ultimately, will be of little benefit”.

Jacob states further that in order for profiling to be successful, two conditions are imperative:

- The curriculum must be stable, have predictability and be inclusive of all students; it should also have future currency.
- Student achievement information must be collected, entered, stored, accessed and transmitted electronically over a period of time.

**Step eight: Management of student achievement information**

One of the critical contributory factors to the success of profiling is the management of student achievement data. Jacobs and Haynes (Interview: 1999) emphasise that the provision of suitable computer applications is essential to the effective and efficient implementation and management of profiling.

**3.10.2 New South Wales (NSW)**

According to Eltis (1995: 3) the first formal impetus within New South Wales for an outcomes-based approach came from the Education Reform Act, 1990, section 14 (3) which states that any syllabus developed or endorsed by the Board for a particular course of study “is to indicate the aims, objectives and desired outcomes in terms of knowledge and skills that should be acquired by the children at various levels of achievement by the end of special stages in the courses, and any practical experience that children should acquire by the end of such a stage”.

As a result in 1991, the NSW Board of studies began developing statements of outcomes for each of its syllabuses for year K-12. The Board made it clear that it did not view outcomes as providing and indication of linear progression in learning, but that outcomes would allow for
different qualities of achievement. From 1990 to 1993 the Board developed outcomes arranged in stages of schooling as required by the Education act.

Schooling was based on six stages: Years K-2, 3-4, 4-6, 7-8, 9-10, 11-12. The NSW Board of studies was requested to incorporate the outcomes of the National profiles into the NSW syllabuses. The board was also advised that while they should be consistent with the national outcomes, the outcomes should reflect NSW needs. The first syllabuses that were developed to incorporate outcomes from the national profiles were English K-6, Studies of Religion 7-10, Aboriginal Studies 7-10, Music 7-10 and Visual Arts 7-10.

Later in 1993, the Board incorporated all syllabuses according to the National profiles in order to assist the Department of Education to implement its teaching and learning. The timeline for completing this work was at the end of the first term in 1995.

In 1993, the Department of Education demonstrated support by reorganising its head and regional office creating a new teaching and learning portfolio in support of profiles.

In December 1993, the department signed an Enterprise Agreement with the NSW Teachers Federation, prioritising curriculum development and support for teachers implementing the new curriculum in 1994 and 1995 (Eltis & Mowbray, 1997: 85).

Curriculum areas identified in this period were as follows:

- English K-6
- Introduction profiles in Year 7 in all key learning areas
- Literacy across the curriculum in Year 7
- Vocational Education

It became evident that the timelines set out were too ambitious and unachievable. Thus, steps were taken by the Department and the Teachers Federation to limit the initiatives to important ones.

According to Eltis and Mowbray (1997: 85-86), a memorandum was drawn up and signed by the relevant stakeholders outlining broad objectives, as follows:
• Teachers will begin programming around outcomes in English K-6 during 1995.
• Kindergarten teachers will begin to assess and report in terms of the Early Learning Profiles in Term 1, 1995.
• All other primary school teachers will begin to assess and report in terms of the Profiles in English by the end of 1995.

At the end of 1995 a review would take place by the Department of School Education and NSW Teachers Federation to establish progress.

It is interesting to note that the Board of Studies in NSW is responsible for the development of outcomes-based syllabuses, teaching, learning, assessment and reporting across schooling until year 9, while the school certificate at the end of year 10 is issued from the schools system and the Department of Education (Bradburn 1999).

According to Eltis and Mowbray (1997: 86), “The Department saw Outcomes and Profiles as presenting a clear hierarchy for reporting growth in achievement of learning outcomes across the eight levels of the national statements and profiles”.

The Department of Schools Education also became involved in developing profiles and outcomes in English for Level 1 as kindergarten teachers felt that English outcomes development by the board was of limited benefit to them. The Early Learning Profiles were then trialed in schools and modified resulting in success and positive comments being made to the Eltis Review. They provided focus and direction for teachers and made it easier to identify needs. Negative aspects centred on the time consuming aspect of profiling.

3.10.2.1 Professional development support

The Department developed two professional development modules:

• Module 1: An Outcomes and Profiles Approach in Focus
• Module 2: An Outcomes and Profiles Approach in the Classroom

Professional development was aimed at raising teachers’ awareness and understanding. The modules were aimed at providing a general overview. According to Eltis and Mowbray (1997: 87), “They were developed as a series of overheads and workshop activities to explain the aims
of the strategy, the relationship between national and state initiatives”. This was founded around a ‘train the trainer model’ involving regional consultants who presented the strategy through prepared overheads.

This form of professional development was widely criticised, although it did offer direction to secondary teachers. The next professional development process involved the preparation of support materials for English as a second language scales. The scales designed were first trialed, consulted on, and revised before being released for implementation. The aim of the ESL scales was to provide a bridge for the key learning areas, especially English, as well as to present a common language between ESL and mainstream teachers.

The Association of Teachers of English to Speakers of Other Languages (ATESOL) expressed general support for the scales in their submissions to the Eltis Review Panel. However, concerns were raised about the comparability of the ESL scales with the English outcomes and with Early Learning Profiles. According to Eltis and Mowbray (1997: 88), “there was also evidence in both primary and secondary schools with large LBOTE (Language Backgrounds Other than English) populations of anxiety at the difficulty of combining ESL scales into key learning profiles”. It was believed that outcomes and profiles were mono-cultural constructs. Many teachers felt that the scales were too complicated and that ESL was inconstant.

3.10.2.2 Visits to schools

The Eltis Review as well as many other relevant stakeholders noted, on visitation to various types of schools, some evidence of changes in school practice, which had increased between 1990 and 1995. According to Eltis and Mowbray (1997: 89), “The mandatory inclusion of syllabus outcomes arising from the Board's 1991 statement on Curriculum Outcomes had brought a sharper focus to issues concerning teaching and learning in many schools”. However, there was a shift of focus in 1993 towards assessment and reporting. Accountability became of paramount importance.

While profiles were viewed as a means of measuring educational standards, they were also seen as a way of making clear what they were setting out to achieve. Reporting at schools shifted from norm-referenced to more criterion-referenced assessment.
According to the Eltis Review, the task of reporting against outcomes varied considerably from school to school. Many thought it essential to build portfolios of student work as evidence of achievement of specific outcomes.

Secondary schools did not respond positively to the Eltis Review on reporting. It was felt that they did not receive adequate support and professional development in comparison to the primary schools.

3.10.2.3 The New South Wales Review of profiles and outcomes

According to Eltis and Mowbray (1997: 90), the Eltis Review was established in April 1995 by an eight-member panel consisting of experienced principals, academics and a parent representative, to review progress in the implementation of the outcomes approach in NSW schools. The Review was formed as a result of concerns about the quality of the curriculum materials being promoted, the implications for teacher’s workloads and the speed of change.

i. Findings of the review

- While substantial support for an outcomes-based approach was acknowledged, widespread dissatisfaction with the implementation was found. The findings are discussed below.
- While teachers were committed to improving teaching and learning concerns were raised about the increasing complexity of teaching and demands on their time.
- There were varied opinions on what was understood to be effective teaching. Views also differed on preparation of lessons, assessing, recording and reporting students' progress.
- According to Eltis and Mowbray (1997: 91), “Both advocates and opponents of outcomes-based reporting saw difficulties with implementation”. Much concern was raised about the quality of outcomes and training received towards implementation as well as the workload associated with it. Perspectives on workload issues differed from primary to secondary schools. While the reporting of outcomes in each key learning area was of importance to primary teachers, the need to report outcomes for each student taught was of importance to secondary teachers. Secondary school teachers were also concerned about the fact that they were required to report on students they saw for a short period only each week.
ii. Understanding of terminology

Differences in the way terms relating to outcomes and profiles were used led to inconsistent definitions, which eventually resulted in different perceptions and practices across the state. For example, some schools perceived outcomes as checklists while others saw them as learning targets or mastery outcomes. Further concern and confusion arose when the Board of Studies changed its definition of outcomes. According to Eltis and Mowbray (1997: 92) Submissions to the Review also revealed that the term 'profile' was taken to mean various things:

- The ‘national profiles’.
- A report on a student expressed in outcomes.
- A portfolio of a student's work said to give a ‘profile’ of the student's learning.
- A graph of performance of a class.
- The outline of a subject curriculum expressed in outcomes.
- The assessment of aspects of outcomes.

iii. Curriculum

The most serious concerns about the implementation of outcomes centred on the curriculum. The syllabuses and draft materials developed by the Board of Studies raised considerable concern with the Department of School Education. The issues addressed were:

- Continuity.
- The quality and rigor of the outcomes statements.
- Consistency in the standards and outcomes across all key learning areas.
- The inclusion of level statements.
- Presentation of the outcomes framework within the syllabuses.
- Attitudes and value outcomes.
- The quality of pointers.

The lack of clarity of the language used to describe outcomes and user-unfriendly terms developed by the Board of Studies were criticised by many members of the Review who saw this as an impediment to implementation.
iv. Equity

Outcomes were perceived by the Department of Education and the Board of Studies as a vehicle for advancing equity. An outcomes and profiles approach would benefit disadvantaged students allowing them to progress at their own rate thus enhancing their self-esteem. The focus was on allowing all students to succeed.

The Board of Studies also emphasised that outcomes and profiles branded student growth and progress and avoided the concept of student failure. While the Review identified the prospect for equity through outcomes and profiles, observations and concerns were raised about 'avoiding failure', which was understood as lowering the commitment to attaining equity goals.

v. Teaching and learning

Teachers viewed the introduction of the outcomes and profiles approach both positively and negatively. Positive aspects raised were:

- Increasing recognition of teacher professionalism.
- Increased focus on recognition of individual students and their learning.

Negative aspects raised were:

- The implementation of outcomes and profiles was perceived by teachers as representing a lack of trust and confidence in their professional judgement because of increased accountability required by them.
- Loss of teacher individuality and autonomy because of the adoption of one mandatory teaching and learning style.
- A lack of balance in the change of teaching and learning versus assessment and reporting in the classroom.
- The increased time spent in the classroom on assessment and reporting activities.
vi. Implementation timelines

The speed of implementation varied across school systems in the state. The time frame of the Enterprise Agreement remained a dominant factor despite attempts by the Department of School Education to slow down the process of implementation. Many government schools ignored statements made by the Director General, who asserted that emphasis should be placed on quality and not speed in the implementation of outcomes and profiles, and that it should proceed at a pace which teachers found comfortable. They had rushed ahead towards implementation. Non-government schools, on the other hand, did not proceed with the implementation of outcomes and profiles, but had examined, inquired and analysed issues surrounding implementation.

In short, the majority of government schools condemned and opposed the timeline proposed for implementation. The introduction of the new syllabuses and focus on outcomes and profiles overwhelmed many teachers and schools.

vii. Teacher support and workload

The placing of restrictions on the use of teacher relief because of Commonwealth NPDP funding guidelines impacted negatively on professional development outcomes. Monetary restrictions resulted in hurried development and delivery of support modules, often before schools were ready. Also the train-the-teacher model was criticised because of the absence of adult learning principles as a basis for development. The changes towards the implementation of outcomes and profiles were seen as an imposition with shocking demands on their time. This top down model of change deflated the morale of teachers.

viii. Assessment and reporting

"Many teachers perceived the outcomes and profiles approach to be assessment rather than curriculum-driven" Eltis and Mowbray (1997: 95). School visits showed that primary schools prioritised assessment and reporting to parents. Reporting to parents on what students could do rather than could not do, heightened the positivity of assessment and reporting. According to Eltis and Mowbray (1997: 95), negative comments related to:
• The impact on teachers’ workload.
• The shift in classroom activity towards assessing and reporting at the expense of teaching and learning.
• Differing interpretations by teachers of what represented achievement of an outcome.
• The inconsistency in the approach of primary and secondary schools at the year 6-7 transition.
• Difficulty in reporting by levels.
• The disparity between the 8 levels outlined in the national profiles (based on about 20 months of schooling) and the requirement of the NSW Education Reform Act (1990) for syllabuses to be constructed around stages (based on years of schooling i.e. k-2, 3-4, 5-6, 7-8, 9-10).
• Support for an outcomes focus without the constraints of profile reporting.

ix. Review's recommendations

The Review Panel made a number of recommendations. Firstly, they viewed outcomes learning, derived from syllabuses and incorporating content and presentation of learning programs, as beneficial for all the stakeholders in education. Outcomes had the potential to address equity in schooling. The school curriculum should be suited to the student’s own experiences, cultures and values. They acknowledged that while the research base for OBE was not well developed, value was seen in this approach by the teaching profession, provided that flexibility and reasonable time frame be used.

Secondly, as far as content and standards were concerned, the Board emphasised that the NSW syllabus should form the basis for curriculum content in NSW schools. Outcomes in curriculum and expectations of what students would be able achieve had to be clear. A manageable and achievable number of outcomes had to be developed within each subject. The outcomes had to be arranged according to stages of compulsory schooling (Years K-2, 3-4, 5-6, 7-8, 9-10). Achievement should not be limited in terms ages of years of schooling.

Thirdly, with regard to the national curriculum framework, the Review authorised participation by NSW in the development of further national curriculum initiatives. However, while the NSW outcomes would relate to the national framework, the Board of Studies would no longer
be required to incorporate national profiles into NSW syllabuses. Syllabus outcomes would be acquired from subject content and then referred to the national framework.

Proposals made by the Review to lighten teacher workload included:

- Reducing the number of outcomes in syllabuses.
- Extending and clarifying timelines for implementation.
- Providing schools with more beneficial support materials, acquired from the teachers' own experiences.

Changes to the primary and secondary school curriculum were minor. In the primary school changes were made to the English k-6 syllabus. These included reducing the number of outcomes, supporting the functional approach to grammar in the syllabus, and removing the terminology of 'Functional Grammar' and replacing it with more conventional grammar. In the secondary schools recommendations were made for a limited number of outcomes to be developed in the core areas of English, Mathematics, History, Geography and Science within a sensible time frame. As a result, the Department has since become more involved by assisting teachers in the problem areas of reporting and assessment. Tests are now conducted in Years 3, 5 and 7 across NSW to ascertain whether standards are being maintained.

3.10.3 Victoria

Drastic educational change occurred in Victoria after the election of the Kenneth Liberal-National Party Coalition government in October 1992. Delivery of state education underwent a metamorphosis with emphasis on reform programs. Accountability, efficiency and measures to enable each child to achieve her full potential were foremost in the reform program.

Before the development of National Statements and Profiles in Victoria, Framework documents, which were published in 1998, dictated the curriculum for compulsory years of schooling. The documents were intended to assist schools in formulating and organising courses around the needs of the students. The Framework documents focused on the development of the National Statements and Profiles in the curriculum. They comprised 9 subject areas and a school curriculum. Subjects outlined were Commerce, English, Mathematics, Personal Development, Science, Social Education, Technology Studies, Languages other than English (LOTE) and the Arts.
The shift in Victoria towards an outcomes-based curriculum led to the development and publication of the Victorian English Profiles Handbook in 1991 and the release of the draft Victorian Number and Space Profile in 1992. The profiles provide a common language and framework for charting students' progress, which would assist in communication of detailed and accurate information between teachers and schools. Howes (1997: 109) claims that Victoria moved faster than any other state to mandate and implement a statewide outcomes-based curriculum framework and assessment and reporting program.

3.10.3.1 The development of the Curriculum and Standards Framework

The development of the CSF document from the national documents to a local context was quite a difficult process. Firstly, the Minister of Education had reservations about the National Statements and Profiles. He then approached the Board of Studies to advise him on defalcations in the documents. Thereafter he set up review groups in Mathematics and Science. These consisted of academics from the University of Melbourne who strongly criticised both the Mathematics and Science documents. As a result of the criticism a Ministerial Advisory Committee was created to:

- Advise the minister on deficiencies in the Mathematics Profile.
- Recommend modifications to address these deficiencies.
- Recommend a process and time frame for the modifications.

Howes (1997: 111) notes the committee findings:

- The outcome statements at levels 7 & 8 did not quantify the learning demonstrated by high achieving students adequately.
- The outcome statements were sometimes too wordy.
- Many of the pointers were impossible to understand.
- The Profile was not suitable for reporting to parents.
- There was a danger that the pointers in the curriculum would be used as a checklist.
- None of the components of the Profiles (strands, outcomes, pointers, work samples) provide sufficient detail to design courses of study and depth.
- The profile was therefore not suitable for course design.
These findings prompted the Minister to ask the Board of Studies for a detailed review of each of the National Statements and Profiles. Howes went on to say that the Board had to investigate:

- The extent to which the national statements provided an appropriate framework for developing the school curriculum.
- The extent to which profiles described the full range of student’s achievement in the compulsory years of schooling.
- The extent to which profiles were appropriate for use in reporting to parents, curriculum planning and collecting system-wide data on students achievements.
- The processes and timeframe to undertake any necessary trialing or modifications within Victoria.

In 1993 the Board undertook an extensive process of consultation with all the necessary stakeholders in education.

In December 1993, Howes (1997: 113) notes that the Board presented its review to the Minister which highlighted the following:

- The 8 key learning areas adopted for the national Statements and Profiles did provide an adequate basis for a curriculum and standards framework for Victoria, and such a framework should be developed.
- The concept and organisational structure of strands and levels of achievement within learning areas was appropriate for such a framework.
- The structure of the multiple strands at each of the eight levels was inappropriate for reporting student achievement.
- The Arts, English, Technology, Health and Physical Education required least adaptation but none should be adopted in their existing form.
- Both Maths and Science were subjected to more severe criticism especially from universities in relation to the attention paid to the development of skills and knowledge within the disciplines, and required modification.

The Minister accepted the Board’s advice. They went ahead to develop the CSF and key learning areas. Notification was then sent to all principals informing them that the CSF would
merely provide a framework. Schools would have to shoulder the responsibility of developing their own teaching and learning programs. The draft for the CSF was completed by mid 1994. Thereafter consultation followed between the various stakeholders including 38 primary and secondary schools from all sectors. The CSF was endorsed for publication by the Minister at the end of 1994 after consultation and modification and then distributed to all Victorian schools in early 1995.

Dennet, Manager, Curriculum Development, Department of Education, Victoria (Interview: 1999) observes that links were made between levels of achievement and school year levels as follows:

<table>
<thead>
<tr>
<th>Level</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>End of preparatory year</td>
</tr>
<tr>
<td>2</td>
<td>End of year 2</td>
</tr>
<tr>
<td>3</td>
<td>End of year 4</td>
</tr>
<tr>
<td>4</td>
<td>End of year 6</td>
</tr>
<tr>
<td>5</td>
<td>End of year 8</td>
</tr>
<tr>
<td>6</td>
<td>End of year 10</td>
</tr>
<tr>
<td>7</td>
<td>Enrichment of those exceeding level 6</td>
</tr>
</tbody>
</table>

Levels 7 and 8 of the National Profiles were collapsed into one level.

According to the Board of Studies and the Department of Education, “Documents entitled ESL companion to the English CSF and Guidelines for implementing CSF for students with Disabilities and Impairments became important in the framework”. The introduction of ESL Companion brought English as a second language teaching program into the mainstream curriculum, providing schools with an option for assessing and reporting the achievement of ESL students.

According to Howes (1997: 115), “The Guidelines for Students with Disabilities and Impairments established that learning activities for such students should be selected from the 8 key learning areas and be linked to expected student learning outcomes”. While the need for individual programs for students with disabilities and impairments were emphasised, individualised programs within the framework is also established for mainstream students.
3.10.3.2 The Curriculum and Standards Framework and the Key Competencies

The Mayer 'key competencies' were also subject to review by the Board of Studies to ascertain their quality as well as relevance for use in assessing and reporting student achievement and the extent to which they were fixed in Victorian curriculum documents.

The whole concept of the key competencies in school education was just to prepare students for work requirements. It should also be noted that while the status of key competencies remained unresolved in most states and territories, Victoria went ahead and included the key competencies in secondary school assessment and the VCE Study.

i. The Implementation of CSF

The implementation of the CSF in Victorian schools has not been closely monitored and evaluated to determine its success or failure. However, it is hoped that change will take place in assessment and reporting in schools. As far as Independent and Catholic schools are concerned, it is also too early to report the impact of the development of CSF on the curricula.

ii. Support for the implementation of the Curriculum and Standards Framework

Both the Directorate of School Education (DSE) and the Board of Studies have pledged their support towards the CSF by printing numerous resources on it. Howes (1997: 122) affirms that there are 3 factors which have driven the publishing explosion in Victoria:

- The commitment of the Board of Studies to develop exemplar courses to improve the quality of curriculum programs to enhance learning outcomes.
- The recognition of the DSE that schools require assistance to achieve the challenging task of the full and immediate implementation of an outcomes-based curriculum, assessment and reporting program, with few if any precedents of similar implementation to turn to anywhere in the world.
- The restructuring of the local curriculum under the 'Schools of the Future' policy has meant that the provision of support through print materials, perceived as highly cost-effective means of support, has been given a high priority.
Three other forms of support material have been provided in addition to the printed materials. The first is satellite-transmitted educational programs produced by the DSE to provide all schools, especially those in remote areas, with access to teaching resources that will assist them in providing a more comprehensive curriculum than would otherwise be possible. According to the Department of Education (in Howes 1997: 123), “The Science and Technology Education in primary schools are transmitted on a fortnightly basis for Years Preparatory, 1-2, 3-4, and 5-6 students and teachers via the satellite network, SOFNet”. All programs are linked to the CSF.

Primary and Secondary Access to Languages via Satellite (PALS) are also shown on SOFNet. These programs are aimed at the enrichment and extension of LOTE programs. PALS support materials are developed in a variety of languages for beginners and continuing learners in Years 3-6, while SALS support materials are developed for Year 7 and Year 11-12 students. The second is the CSF teacher networks within each district across the state in the 8 key learning areas. The Directorate and the NPDP were to appoint network leaders to support network activities and professional development bodies have provided funds.

According to Mercator Software Pty Ltd (in Howes 1997: 123), the third is the development of KIDMAP, a computer software program designed to assist teachers in government and Catholic schools in implementing an outcomes-based curriculum.

The most successful documents released were the course advice documents distributed to schools by the Department of Education. The documents attempt to connect the outcomes of the CSF and classroom practice. Support packages were also provided on assessment and reporting as they are central the implementation of the CSF.

Reporting in schools is based on the following four-point scale:

- The student has established the relevant knowledge and skills essential at the level in a variety of contexts.
- The student is consolidating the skills and knowledge essential for that level; however, not all of the necessary behaviours are exhibited.
- The student is beginning to show some signs occasionally of skills and knowledge with assistance.
- No progress is apparent in skills and knowledge acquired.
It should be noted that the DSE does not regard number 4 on the point-scale as appropriate since it implies that no learning has taken place whatsoever.

The figure below illustrates how this has been adapted in Victoria to accommodate profiling.
Figure 3.4 Resource Materials Related to Implementation of the CSF (Howes 1997:124)
The Course Advice materials, according to Howes (1997: 125), “are probably the most significant of all the forms of support offered to schools”.

iv. Assessment and reporting against the CSF

Howes (1997: 126) observes that “The real impetus for the implementation of the CSF came from assessment and reporting policies and practices”. In 1996 the Board of Studies sent a document to all schools advising them on how to develop assessment and reporting procedures consistent with the CSF. Howes notes that the most significant points made were the following:

- Student achievement is best reported on the basis of levels and strands rather than either individual outcomes or the whole key learning area. The rationale provided is that ‘the generality of whole key learning areas as a focus for reporting risks conceals useful information. According to the Board of Studies “reporting on the detail of individual learning outcomes would risk overwhelming the reader with excessive information…. ” (Howes, 1997: 130).
- Assessment of achievement of outcomes will be on the basis of ‘on-balance’ judgements made by teachers on a range of information.
- Key issues in using the CSF outcomes as the basis for assessment and reporting include developing consistency in assessment decisions across different classes, schools and regions.

Howes states the first point appears to be controversial for it signals an approach to using outcomes that is at odds with many commercial textbooks and record keeping software programs appearing in the Victorian education arena, that claim to be based on the CSF. He argues that many of the books and programs encourage teachers to use the outcomes as a checklist, ticking off outcomes as tasks have been observed and completed. The Board on the other hand encourages teachers to develop 'rich assessment tasks' which enables students to demonstrate a number of outcomes from a range of levels through the same task depending on their skill and knowledge.
3.11 CONCLUSION

Australia has a population of approximately 18.5 million inhabitants. Of these approximately 3 million are school students, 700,000 university students and 1.4 million are involved in vocational education and training. Education in Australia can be viewed prior to 1901 and post 1901. Prior to 1901 Australia consisted of six self-governing states which were colonies of the United Kingdom. After 1901 the Commonwealth of Australia was formed resulting in six independent states and two territories. In 1975 Australia transformed from an exclusively white continent to a multicultural continent as a result of the disbanding of the ‘White Australia’ policy (cf 3.3). However, English remains the only official language in Australia. Major changes in education occurred as a result of the Karmel Report instituted by the government (cf 3.4.2). Changes recommended by the Karmel Report focused on decentralising states so that schools could operate more freely, providing an education for all children in Australia based on equality, accommodating diversity in both teachers and learners, community involvement in schools and lastly encouraging schools to be instrumental in transmitting skills, knowledge etc (cf 3.4.2). Deficiencies identified in the schools were a disparity in resourcing schools, a large number of untrained teachers and a restrictive curriculum. Economic instability in Australia prompted the government to introduce a ‘school-to-work’ transition program which would enhance the economic market. The period 1985-1987 marked the beginning of an emphasis on outcomes. In 1987 education was grouped with employment and training enhancing the view that schools played a critical role in enhancing the economy (cf 3.4.3). Curriculum and assessment reform began in 1986 in Australia while the writing of statements and profiles commenced in 1989. The implementation of profiles was met with mixed feelings from many teachers. While some saw it as a positive step many viewed it negatively. Problems identified in implementation were:

- Extra workload and demands made on the time of teachers (cf 3.10.1.1, 3.10.2.3, 3.10.3.1).
- The profiling concepts and language was convoluted, not user-friendly and too difficult to read (cf 3.10.1.1, 3.10.2.3, 3.10.3.1).
- There were far too many documents to consult.
- An outcomes approach was seen as narrowing down the curriculum.
- Insufficient training and support for teachers.
• A lack of balance in the change of teaching and learning versus assessment and reporting in the classroom (cf 3.10.1.1, 3.10.2.3, 3.10.3.1)

• A lack of trust and confidence in the professional judgement of teachers because of increased accountability required of them coupled with a loss of individuality and autonomy because of a mandatory teaching and learning style.

• Profiles were viewed as not suitable for reporting to parents, as parents were not interested in lengthy explanations.

From the above it can be deduced that the implementation of OBE in Australia is not without problems. Many of the problems identified feature similarly in South Africa (cf 1.1.1.3, 1.1.1.5). They will be discussed in detail in the next chapter.
CHAPTER FOUR

OBE IN THE EDUCATION SYSTEM OF SOUTH AFRICA

4.1 INTRODUCTION

This chapter provides a detailed analysis of the history of education on South Africa. It considers the impact on education of socio-cultural and political change leading to an overhaul of the education system. Finally, it traces the introduction and implementation of OBE and Curriculum 2005 in this country.

4.1.1 Geography

South Africa covers an area of 1,224,691 square kilometres at the tip of the African continent. It is bordered on the northwest by Namibia, in the north by Botswana and Zimbabwe, and in the northeast Mozambique and Swaziland. On the east and south it meets the Indian Ocean and on the west by the Atlantic Ocean. Lesotho forms an enclave in the eastern part of the country. The administrative capital of South Africa is Pretoria, the legislative capital is Cape Town, and the judicial capital is Bloemfontein.

Figure 4.1 Map of South Africa Microsoft Encarta Encyclopedia 2000.
The Republic of South Africa has 9 provinces: the Eastern Cape; Gauteng; KwaZulu-Natal; Mpumalanga; the Free State; Northern Cape; Northern Province; North West and the Western Cape.

4.1.2 Population characteristics

South Africa has a population of 42,327,458 (1997 estimate), with a population density of 34.6 persons per square kilometer (89.6 per square mile). Its population in 1997 was 75.2%; black African, 13.6% white, 8.6% Coloured (mixed ethnic background), and 2.6% was Asian. It has a multiracial and multi-ethnic population. Approximately 6,930,023 million are primary school students, 3,377,302 million attend secondary school and 293,670 thousand are Learners with Special Educational needs (LSEN) (DOE/EMIS, 2000). Students attending university total approximately 326,354 thousand while students attending technikons are approximately 161,868 thousand (DOE/EMIS, 2000). The population census of 1996 (Orkin, 1998) offers the latest available statistics on the distribution of the population and growth rate. The graph below illustrates the distribution of the land area of South Africa by province.

Figure 4.2 Distribution of the land area of South Africa by province

(Orkin 1998: 1.1)
The graph below illustrates the number of people in each province by population group.

Figure 4.3 Number of people in each province by population group – October 1996
(Orkin 1998: 2.5)

4.2 DEVELOPMENT OF THE EDUCATION SYSTEM IN HISTORICAL PERSPECTIVE

4.2.1 Early education

The first slave school was established in 1658 focussing on Dutch Religious Education. These slave pupils were rewarded with a daily tot of brandy and two inches of chewing tobacco. The first white 'school' opened in 1663 (Hartshorne, 1999). South Africa in the 19th Century was characterised by British Rule and the Boer Republics. Hartshorne (1999: 18-19) claims that the Education Policy during this period was influenced by the following factors:

- The Missionary societies and Evangelical Churches which made major contributions to the early development of Black Education.
- The British and Dutch settlers who demanded schools for their children.
• The development of mining, which led the Witwatersrand Council of Education to set up alternative forms of education to those provided by the government and the Transvaal Republic.
• The Boer Republics, which provided education founded on the principles of the Dutch Reformed Church. In 1839 the British Colonial government set up the Cape Education Department, which had a stronghold over white education through regular inspection, while adopting a laissez-faire attitude to blacks and their education.
• Industrial education was encouraged for blacks as the thinking of that period and many decades later was that schooling was not essential for blacks. Britain was unperturbed by the treatment of blacks in South Africa at that time. Its main concern was that its interests in the country be served. It should be noted that the missions played a secondary role in education policy. Up to 1910 the state had a final say in educational matters.

South Africa became a union in 1910, delineating four provinces, namely, the Cape, Transvaal, Natal and the Orange Free State (Seleti, 1999). The provinces were responsible for education, health, roads and environment.

Between the periods 1910-1948, ‘Native Education’ was severely neglected. (Nzimande, 1998). Hartshorne (1999: 21) argues that “The interests and energies of the two white groups were concentrated on the internecine struggle between English and Afrikaner for control of the state, its bureaucracy, its facilities, and its patronage”. The quest for power, control and domination by both the Afrikaner and English whites led to two central educational issues:

1. The position of Afrikaans in white schools.
2. Separate schools for the two white groups.

Missions still financed black education at the time. The pattern of segregation, discrimination and equality became firmly established with all education policy and resources retained in the hands of whites (Claassen, 1996). The Native Taxation and Development Act offered to fund black education between 1925 and 1972, which meant that it functioned through a fixed state grant from general revenue. Any further expenses would have to be met from black taxations raised for the Native Trust Fund. In other words, blacks were responsible for their own education, while white education relied on the resources of the country, thus strengthening and
enhancing their position in terms of economic and political privilege (Seleti, 1999; Claassen, 1996, & Nzimande, 1998).

During the mid-thirties a number of government commissions were introduced to explore the issue of ‘Native education’. The need for central state control was evident. The recommendations of the Inter-departmental Committee that native education should fall under the Union Education Department was to become a point of contention and a milestone in the history of education (Hartshorne, 1999). However, the outbreak of the Second World War negated any recommendations from the Commissions, once again restricting blacks to unskilled and semi-skilled work.

4.2.2 Apartheid education

According to Nzimande & Thusi (1991: 3), “The roots of the present education crisis in South Africa go back to the victory of the Nationalist Party in 1948”. 1948 marked the beginning of political domination by the Nationalist Party, which was to continue until 1993. In 1948 Education Departments were set up for Indians in Durban, Coloureds in the Cape and blacks in Pretoria. According to Hartshorne (in Donn, 1995: 2). “…the 1953 Bantu Education Act not only allowed for strict control over black education, but also allowed the government to take control of the mission sector, thereby breaking the power of denominational educational institutions and their curricular”. The ideology for Bantu education stemmed from Christian National Education and separate development. While each province was given legislative responsibility for education, problems arose when they wanted to provincialise the National Core Curriculum.

As provinces wrote their own ‘senior leaving certificates’ they had to be validated by teachers teaching matriculation level subjects with no tertiary education. In 1976 the Science Education Project, a non-government organisation embarked on a project attempting to improve the quality of teaching and the culture of learning science in black schools in South Africa. Macdonald & Rogan (in Donn, 1995: 3) claim that “the project highlighted the view that the textbook and printed syllabus are the only two documents which most teachers work with”. Provincial senior school leaving certificates had to be validated by the Joint Matriculation Board, which stipulated a ‘matriculation exemption’ to enter higher education controlled by the University of South Africa. Separate departments diminished curriculum inputs from the whites. However, while the
Indian, Coloured and black education departments were expected to manage and maintain their own education departments, they were not afforded the opportunity at national level to plan and develop the curriculum (Donn, 1995).

According to Donn (1995: 3), “by the 1970s South Africa’s schooling was firmly fragmented with apparently ‘appropriate’ curricula for each cultural and racial group, and a failure to maintain quality education for African educational institutions”. He observes that “As resourcing became more iniquitous, the possibilities were further reduced for African students having access to science equipment, to passing standard 10 science, to sitting to matriculation exemption, or entering university...”. Thus teachers in African schools were poorly qualified.

During this period control over education and its policies became even more stringent than before. By the late 1970s an economic crisis took its toll on South Africa. Hartshorne (1999: 27) claims that pressure and criticism from the business sector raised two important concerns:

1. The ‘products’ of the education systems, lack of preparation for the technological world and the inferior position of vocational, technical, ‘career’ educational facilities were criticised.

2. There was a growing realisation that the ‘apartheid’ ideology, which translated into realities of inferior, inadequate education systems, was not compatible with the so-called free enterprise system and the maintenance of economic growth.

Demands were made by the private sector for education systems to produce skilled person-power required by the economy. However, the most pressure came from black people who were no longer prepared to accept an inferior separate education system. The tragic Sharpeville Revolt of 16 June 1976 against the use of Afrikaans as a medium of instruction impacted heavily on education in schools. During the period 1976 to 1986 education was characterised by resistance, violence and finally a breakdown of the education system (Nzimande, 1998). As a result of the Soweto riots and the economic crisis, the government commissioned the Human Science Research Council to carry out an investigation into the state of education in South Africa. The De Lange Commission (Hartshorne, 1999), a report which discouraged academic education for Africans and emphasised vocational education as an alternative consequently emerged.
Emphasis was placed by the De Lange Commission on a ‘more practical learning paradigm’ to be developed in educational institutions in black communities (HSRC 1981: 138). It was believed that this could assist black students in ‘the cultural transition to the modern technological world’ (HSRC, 1981: 14). Simultaneously, mixed messages clouded the principles of equal opportunities for education, irrespective of race or sex. The report was regarded as a significant departure from the Verwoerdian perspective on education and training (Donn, 1995). It was firmly located within an emerging technicist discourse concerning the primary role of the market defining education and training policy. According to Chisholm (1983), education thus played a vital role in socio-economic development.

The formation of the Tri-cameral Parliaments in 1983 with the Coloured House of Representatives (HOR), an Indian House of Delegates (HOD) and a white House of Assembly (HOA) presented Directors of Education with more control over curriculum matters. Many Coloureds and Indians met the tri-cameral parliament with much opposition in South Africa, as it was seen as an extension of apartheid. Nevertheless, it proceeded and went on to form segregated Departments of Education, while Africans outside the self-governing territories came under the Department of Education and Training. According to Donn (1995: 5), “there were 19 education authorities, each having unequal access to resources – both human and financial”. Thus, during the period 1950 to 1990 inequality was maintained by Bantu Education.

Given economic factors, school education for the Bantu was purely utilitarian in South African society. Gold mining had dominated the South African economy because of cheap labour costs and exploitation of the unskilled black population. The pressure on employers to retain workers in the mines meant that little work developed in the ‘homeland areas’ and elsewhere. Donn (1995: 6) stated that consequently, “a colonial economy in a non-colonial country developed”.

The booming of the gold price in the 1960s and 1970s legitimised these inequalities, as well as the poorly skilled racial grouping and differentiated school curricula. Around 1982 the price of gold weakened as a result of the world recession, which led to an economic decline. Fragmentation of social policy taking over was inevitable with the Department of National Education responsible for the nineteen education departments. A decline in the number of graduates produced in university and technikon faculties of engineering and a reduction of investments by the private sector, led to South Africa ranking last in a group of new-industrialising nations (Donn, 1995).
The relationship between political unrest, the economic crisis and social change, with consequent effects on South Africa’s economy, status and education, is reflected in figure 2 below.

![Diagram showing the relationship between political unrest, economic decline, and social change.](image)

**Figure 4.4 The Apartheid State in Crisis (Seleti 1999: 331)**

### 4.2.3 Period of transition: 1990

The years 1990 to 1994 saw the weakening of the apartheid system. A number of important education and training documents which were to impact on the present education system emerged, and a growing support for free market economic policies, directed at producing adaptable, highly trained workers, saw South Africa’s re-emergence into the global economy (Donn, 1995). The need for a higher level of basic education rather than a narrow focus on school-based education was also evident. A curriculum “...developing the intellectual and cognitive abilities of children making mathematics and natural sciences compulsory for the first nine years of schooling” was recommended by the Educational Renewal Strategy (ERS) and in ‘A Curriculum Model for South Africa’ (CUMSA) according to Christie (1994: 48). This signalled changes in government structures towards equity, economic and social development.

When the ANC government came into power in 1994 serious economic and educational issues challenged it. Research through NEPI and CEPD commissioned by the government, suggested that “technologically literate and adaptable workers who are trainable and are prepared to learn new knowledge and skills throughout their working lives” were required (NEPI: HRD, 1992: 25). The research also showed that post-Fordist production required a new technological
literacy, which transcended the historic division between mental and manual labour, requiring advanced skills, and hence a career structure, with grades and skill levels. The South African Trade Unions supported the recommendation to replace traditional Fordist and Taylorist forms of production (hierarchical structured, dead-end jobs with minimal skills, acknowledging the new that successful adoption of these technologies requires well-educated, multi-skilled workforces" (NEPI: HRD, 1992: 41).

4.2.3.1 1995-1997

"The transition from the old system of many departments to a one-plus-nine structure was complex" according to Sedibe (1998: 272). From 1994 to 1995 the old departments continued to operate separately with each racial group still administering its own examinations. However, in 1995, the ‘Education White Paper on Education and Training’ recommended the restructuring of the education system. Moreover, the South African Constitution (1996) came into being with basic rights for every South African Citizen. Everybody has a right to:

- basic education;
- equal access to education institutions;
- choice of language of instruction where reasonably practicable; and
- establish educational institutions based on a common culture, language and religion, provided that there shall be no discrimination on the grounds of race.

The Act also advocated the following:

- School attendance is compulsory between the ages of 7 and 15.
- Admission tests in public schools are not permissible and children may not be refused on the grounds that their parents cannot afford school fees.
- School governing bodies may determine the language policy of the school provided such policy is not used to implement discrimination.
- The governing body can decide on the school’s code of conduct in consultation with parents, teachers and students.
- Religious observation must be equitable, free and voluntary.
To gain a better understanding of the development of the various education systems in South Africa, a brief overview of the social, political and economical development follows. A distinct feature of the social-economic development of South Africa was the promulgation of various laws, which had different impacts on society. They will be highlighted and discussed below under relevant headings.

4.3 SOCIOCULTURAL SITUATION AND POLITICAL SYSTEM

The sociocultural and political change in South Africa has been influenced by language development, the effect of apartheid laws and the economic system. They will be discussed in the sections below.

4.3.1 Language development

Hartshorne (1999: 31) states that “Language policies for education are highly charged political issues and seldom, if ever, decided on education grounds alone”. At the beginning of the twentieth century Britain used English as a tool to achieve ‘Anglicisation’ and maintain political dominance. In 1910 English and Dutch became official languages. Afrikaans took the place of Dutch in 1926 and bilingualism was introduced in schools. The emphasis on exclusive Afrikaans mother-tongue instruction in separate schools was advocated in 1948, cementing apartheid policies (Hartshorne, 1999). Mother-tongue instruction in the first eight years of schooling was the basis of black education. Separate-language based schools existed for both primary and secondary education and running parallel to this system were dual medium schools. Prior to 1953 mother-tongue instruction was limited to the first four years of schooling. In the late nineties English became the dominant medium of instruction in many parts of South Africa, and Afrikaans ceased to be a compulsory subject for black pupils wishing to obtain matriculation certificates.

Today there are 11 official languages in South Africa: Sepedi, Sesotho, Setswana, siSwati, Tshinenda, Xitsonga, Afrikaans, English, isiNdebele, isiXhosa and isiZulu (Constitution of the Republic of South Africa 1996: 5). However, Afrikaans is the only language other than English that is a popular language of learning throughout the education system, from pre-school to tertiary level. All other language choices coexist with English as the language of learning. Presently, indigenous languages are available only as languages of learning for the foundation
phase, after which they are taught as learning areas (Brown, 1998). However, the Constitution (Section 6:2) commits the state to “elevate the status and advance the use of indigenous languages”. The state is obligated to provide education in the official language of the learner’s choice. Ultimately decisions on language policy by the state are influenced by equity, redress and practicability (Chaskalon 1997 in Brown, 1998). The state is not allowed to discriminate against language users in any way. According to the School Education Act of 1995, Section 19, learners at public schools shall be encouraged to make use of the range of official languages…no learner at a public school/private school which receives a state subsidy shall be punished for expressing himself/herself in a language which is not a language of the school concerned. (Barry in Brown, 1998: 19).

Brown (1998: 5-6) notes further that the South African Schools Act of 1996 and the Norms and Standards regarding language policy were revised further. Policy documents today

- Stipulate the minimum number of learners in a class, which is deemed practical for official languages to be used as languages of learning (40 for grades 1-6, 35 for grades 7-12). These figures echo the norms and standards aspiration for educator: learner ratios.
- Stipulate the minimum number of languages to be learnt as two, and which level.
- Define educational promotion criteria attached to language: one official language as a first language to grades 9, 2 official languages for grades 10-12, one of which is an official language. Learners can choose one language from an approved list of languages as their second language option throughout their education; the language could be a ‘foreign’ or community language, provided it is on the nationally approved list.
- Make allowance for learning and language disability and define sign language as an official language.
- Define the language policy rights and duties of individual learners, parents, governing bodies and provincial education departments.

While in theory the School Education Act on Language Policy makes these allowances, educators in this country have sadly not been fully equipped to expedite the set criteria, Thus traditional norms of assessment continue to be the preferred practice as the Department of Education has been unable to support the policy, teachers, learners or education as a whole.
4.3.2 The effect of apartheid laws

Numerous apartheid laws on racial segregation into ethnic groups resulted in distinct cultural developments. They are as follows:

- 1949: Prohibition of Mixed Marriages Act, which made marriages between black and white illegal.
- 1950: Immorality Act, which prohibited sexual intercourse between blacks and whites.
- The Population Registration Act, which classified every South African into a racial group identifiable in the identity document.
- The Group Areas Act of 1950, which extended racial segregation and set aside separate areas for each racial group to inhabit.
- The Separate Amenities Act No. 47 of 1953, which provided separate facilities, not necessarily equal, for each race group. In terms of this act certain beaches were set aside for whites only, blacks were not allowed to stay in hotels, certain seats on the train were reserved and so on.

These acts and laws impacted heavily on South African society. According to Claassen (1996: 458), "It is generally agreed that apartheid was a system which empowered whites and disempowered Africans". The majority of whites in this country make up less than 13% of the population, enjoy a high standard of living comparable to first world standards and also earn 61% of South Africa's income. Blacks in contrast make up more than 76% of the total population and they earn a mere 28% of South Africa's income. While the influence of English and European cultures remains dominant, the diversity between urban and rural blacks in itself presents a barrier amongst blacks. Urban blacks tend to draw on international influences and are more multi-ethnic while blacks in rural areas tend to emphasise the traditions of particular ethnic groups. The failure of the education system in the past to address the cultural diversity of South African society could have been one of the main reasons for change in the educational system.

4.4 ECONOMY

Hartshorne (1999: 17) traces the history of apartheid in South Africa showing its influence and socio-economic development "The roots of apartheid ideas, theories and practises go back to
typical colonialist attitudes and actions, both of the Netherlands in using the Dutch East India Company as a mechanism for the economic exploitation of the resources of the Cape, and of Britain, in its Imperialist mode, establishing political control in order to exploit the mineral wealth and potential of South Africa”.

“Over the last 30 years, the real growth rate in the South African economy has been declining” according to Colclough and Pillay (in Christie, 1997: 60). Claassen (1996: 463) cites the following reasons for such decline:

- Economic sanctions introduced against South Africa because of its apartheid policy took their toll. The absence of exports and import markets seriously hampered economic growth.
- Internal political instability led to labour unrest and general economic decline. In fact, damage to the economy was a major strategy during the liberation struggle, perhaps the most successful strategy in bringing down the old order.
- The worldwide economic recessions which followed the oil crises of 1973 and 1979 had an adverse impact on South Africa.
- Apartheid was expensive to maintain, necessitating a huge input of resources with little dividends. Conventional wisdom holds that economies in which the state has too large a share tend to decline.

While the government is committed to redressing the economic inadequacies of the past through reconstruction and development of education and training, “sluggish economic growth may actually decrease the real budgetary allocation to education” (Claassen, 1996: 464).

4.5 THE EDUCATION SYSTEM OF SOUTH AFRICA (2000)

The present education system in South Africa is administered and controlled by the Department of Education in Pretoria under the auspice of a Minister of Education. However, each province in South Africa has its own Minister of Education who is responsible for the management of education in that particular province.

The figure below illustrates the infrastructure, roles and functions of the Education system in South Africa.
Administration and Control of Education

Minister of Education
Department of Education

Minister of Education
Department of Education
North West

Minister of Education
Department of Education
Northern Transvaal

Minister of Education
Department of Education
Eastern Transvaal

Minister of Education
Department of Education
Gauteng

Minister of Education
Department of Education
Free State

Minister of Education
Department of Education
KwaZulu-Natal

Minister of Education
Department of Education
Eastern Cape

Minister of Education
Department of Education
Northern Cape

Minister of Education
Department of Education
Western Cape

Provincialisation of Education

Administration
- Legislation
- Organisation and Staff establishment throughout the province

Logistics
- Financial Administration Systems
- Personal Administration Systems
- Provisioning Administration Systems
- Office Service Systems

Support
- Education Information
- Physical facilities
- Infrastructure for e.g. Books
- Computerised Systems

Policy for running State Schools
- Adequate facilities for re-opening schools
- Pay salaries
- Curriculum
- Conduct examinations
- Organise subject advisory service
- Language medium
- Policy on subsidies for private schools
- Teacher Training
- Technical Colleges
- Educare
- ABET

Figure 4.5 Infrastructure, Roles and Functions of the Education System in South Africa (Adapted from Donn 1995)
Education in South Africa is to a large extent a state responsibility. From the above figure it is evident that education cascades from the National Department of Education in Pretoria to all the other provinces. The state determines all policy formulation on education.

4.5.1 The education structure

As noted earlier, education in South Africa is compulsory between the ages of 7 and 15 (Republic of South Africa Constitution, 1996). The ANC government in 1994 promised free education to all South African children of school-going age. This never materialised, according to Vally (1998: 3) as “School funding policies are seen to contradict previous commitments to free pre-primary, primary and secondary education”.

4.5.2. Schools

“Public schools in South Africa comprise all schools which are currently known as community schools, farm schools, state schools and state-aided schools (including church schools, Model C schools, mine schools and others). These comprise just over 98 per cent of the country’s primary and secondary schools, and almost 99 per cent of school enrolments” (Education White Paper 2, 1996: 12). “The independent school category will comprise all schools currently known as private or independent schools. These account for about 2 per cent of primary and secondary schools, and about 1.2 per cent of enrolments” (Education White Paper 2, 1996: 12).

Regarding governance for public schools “The Constitution establishes a democratic national, provincial and local government order, and binds all governments and public schools to observe fundamental rights and protect fundamental freedoms...to fund all public schools on an equitable basis in order to achieve an acceptable level of education (Education White Paper 2, 1996: 15).

A detailed account is provided on the phases in primary and secondary schooling in (par. 4.5.3.2).
4.5.2.1 Rural and farm schools

The Schools Register of Needs Survey conducted by the Department of Education found that farm schools were the most poorly resourced in the country. The Minister of Education, Kader Asmal, convened a national conference in May 2000 on farm schools. According to the Minister, there are about 4600 farm schools in the country catering for approximately 600 000 learners. Thus 17% of all schools, or in every five schools in the country, is in fact a farm school (Callaghan, 2000: 6).

Problems faced by farm schools are numerous:

- The learners are mostly the children of farm labourers and are expected to assist on the farm, resulting in absenteeism and disruption of the educational process.
- Parents' literacy rates are low, so there is little participation in their children’s work.
- Lack of supervision in small schools leads to a lack of educator accountability.
- Educators often have to teach five to six grades per class.
- Transport problems lead to absenteeism.
- District officials neglect farm schools.

4.5.2.2 Non-formal and adult education

In 1997 a Bill was issued on ‘Skills Training and Development Strategy’ (Department of Labour, 1997). According to Sedibe (1998: 279), “The focus of the strategy is on training the unemployed and other target groups such as the retrenched, youth, women, rural people and the disabled”. A number of Adult Based Education and Training courses are also offered through universities to address this need. Basic adult education has been funded by both the private and public sector.

4.5.2.3 Distance education

Claassen (1996: 483) states that “distance education is an education delivery mode suited to meet the needs of the economy”. According to Lemmer (in Claassen, 1996: 483), “despite its drawbacks, it offers economies of scale benefits, compared to contact education at residential
institutions, and its flexible nature allows students to earn an income while they study”. It is a favoured model in many institutions at present.

4.5.2.4 Higher education

According to Gerber and Munro (1999: 29), “The South African Higher Education system comprises twenty one universities, fourteen technikons and approximately one hundred teacher training, nursing and agricultural colleges”. They assert that in 1998, while the state sector was made up of more than 600 000 students, private institutions enrolled a further 100 000 students. The university sector dominates the intake of students with an enrolment of more than 60%, while 30% of students are enrolled at technikons and the rest at colleges. As far as funding is concerned, the government contributes only 53% to universities and technikons, while the remainder (47%) is derived from fees (Sunday Times, Best in Higher Education Survey 18/10/1998). Given the meagre funding set aside by the government, there is now a call for the public sector and industry to also contribute to funding, ensuring accountability and better production from graduates. The government’s determination to transform higher education has led to the Higher Education Act No.101 of 1997 and the SAQA Act 1995. According to Gerber and Munro, (1999:30), “Transformation in education involves the amalgamation of the disparate components and structures into a single, cohesive, integrated and co-operative system offering wider access to the entire population, ensuring greater accountability and delivering a better product at all levels of education”. Global competitiveness has placed pressure on South Africa to transform higher education, already accomplished by Australia, New Zealand, Canada and other countries. The National Qualifications Framework (NQF) is a structure, which “provides the means to enable each person who enters learning to achieve nationally recognised and internationally comparable qualifications” (Olivier, 1998). The implementation of the NQF is not without problems, however, and has caused controversy in many higher education institutions. According to Gerber and Monro (1999: 30),

- Because the concept of the NQF originated from the labour movement, higher education institutions perceive a possible drift to vocationalism and undesirable standardisation arising from the application of prescriptive framework requirements.
- Rigid frameworks could have a negative impact on the diversity of higher education frameworks.
- The NQF with its emphasis on outcomes, is perceived to be overly reductionist and behaviourist, and is antithetical to the goals and ethos of university education.
The implementation of the NQF in Higher Education falls into three phases:

Phase 1: The recording of all existing qualifications offered by 30 June 1998.

Phase 2: The interim registration of the recorded existing qualifications in the new format, which was intended to culminate in the completion of the registration by June 2000.

Phase 3: The re-registration of all qualifications on the NQF by 2003.

The implementation of the NQF poses serious financial costs for whoever will eventually take responsibility for funding.

4.5.2.5 Teacher Education

"A shift from an input-and product-based curriculum to a process-and competence-based curriculum which is reflected in other government initiatives such as the NQF and OBE" has been proposed for teacher training (Sedibe, 1998: 275). Sedibe (1998: 276) states "The old departments had operated PRESET and INSET separately without an up-to-date database and the development of teachers was undertaken without any knowledge of teacher demand, supply and utilisation". Presently the only form of INSET that teachers are receiving is on OBE.

4.6 CURRICULUM DEVELOPMENT IN SOUTH AFRICA

In 1998 a new curriculum was introduced in South Africa to eradicate the iniquities of the past. The present form of curriculum is based on the principles of OBE, which as an approach to teaching and learning is intended to affect a paradigm shift from a content-based transmission mode, to a competency-based one. OBE has implications for all stakeholders in learning contexts.
4.6.1 The move to OBE in South Africa

According to Jansen (1999: 3) "The histography of OBE in South Africa is itself a matter of controversy". 1990 signifies an important year in the trajectory of curriculum policy in South Africa. Education systems prior to 1990 were characterised by an authoritarian, euro-centric and racist approach. Characteristically schools in the apartheid era were resourced differently and produced different results. Although efforts by NGOs to produced alternative curricula started in earnest during the early nineties, the apartheid curriculum remained the backbone of education in the school and higher education sector. A consequence of political development in South Africa during the early nineties was the development of differing curriculum positions.

One of the more eminent NGOs active within the field of education, spanning progressive educationists and labour stakeholders (National Education Coordinating Committee), produced an important foundational document, which today forms the basis of the 1998 curriculum policy. The fundamental tenets of this educational paradigm were that it emphasised non-racism, non-sexism, democracy and equality. Key operational areas for future policy attention included, inter alia, adult education, teacher education, childhood education, educational governance and finance. Interestingly, no reference was made at all to OBE in these policy documents (Jansen, 1999: 4-5).

The private sector, deeply aware of the inadequacies of the educational system at the time, tabled for public debate proposals or entrepreneurial education rather than academic focussed education. Other educational lobby groups such as the Urban Foundation produced policy papers, which emphasised educational governance and teacher education. Significantly, none of these NGO communities made any reference to OBE or its many variants. Foreign funded initiatives such as the United States Agency for International Developments (USAID), also produced wide ranging curriculum alternatives, which although desperately needed and worthy of further investigation had no impact at all on the majority of scholars. Significantly there appeared to be no OBE influence in any of these proposals (Jansen, 1999: 5).

The government of the day, aware of the increasing need to transform the educational system within the country, adopted proposals of its own, amongst others, a new curriculum model for the country. Although not proved entirely, the OBE-related idea that "less is more" in terms of
curriculum content and organisation, appeared in government education policy papers in (Jansen, 1999: 5-6). Once again, no direct reference was made to OBE.

The pre-1994 National Training Board, which had lost its legitimacy amongst the NGOs, started consultation with COSATU and produced the National Training Strategy Initiative. This strategy was significant for its integrated approach to education and training. Its currency with discussions within COSATU about Competency Based Education (CBE) as a vehicle to provide an accredited training in the labour sector was noted.

The exchange of ideas at international level saw the advent of different educational frameworks, which served as a forerunner for an integrated educational system based on specific competency. Subsequent to the 1994 elections, the government created two political divisions, which were closely associated: the Ministry of Education and the Ministry of Labour. While much of the discussion on education leading up to the new democratic order focussed on an integrated approach to education and training, there was tragically very little evidence of this.

Education following the 1994 elections was characterised by crises in schools and universities. Steps to ameliorate conditions within the education environment were limited to the sanitation of the apartheid syllabus. These 'ad hoc' measures were initiated without teacher preparation and guidelines, hence their limited success. Following the release of the White Paper of 1995, which reflected key ideas on integration and competency, the government in 1996 issued a document spelling out the proposals for OBE.

Characteristics of these proposals were:

- Teacher involvement in curriculum discourse.
- Recognition of the lack of conceptual connections between integration and competency debates and OBE.
- The development of OBE for schools, which appear distinct from the workplace.
- A reliance upon a Spadian OBE framework (markedly different from the Australian model).
- A shift in language from competency to outcomes.
- Development of a terminology to describe OBE.
• Curriculum 2005 (C2005), which is coupled with OBE in official documents and discourses.

4.6.2 The relationship between Curriculum 2005 and OBE

OBE and C2005 are viewed by many people in South Africa, including the teaching sector, as interchangeable and conflated terms. Official documentation does not distinguish clearly between them. It appears that concepts and aspects of OBE are embedded in C2005. The DOE (1997a) defines C2005 as “an OBE curriculum derived from nationally agreed on critical cross-field outcomes that sketch our vision of a transformed society and the role education has to play in creating it”. C2005 and the outcomes framework appear to be linked with the goals of the NQF and SAQA.

According to Chisholm (2000: 10), “The SAQA defines the NQF as ‘systematic framework for organising education and training around the notion of learning outcomes’, OBE is seen as ‘an approach to education’ while C2005 is seen as ‘the curriculum that has been developed within an outcomes-based framework’”

It should be noted that the definition of C2005 is controversial, as many policy makers and academics disagree on particular aspects of it. However, C2005 was purposefully and intentionally introduced to redress the political and educational injustices of the past. A shift in focus on the role of various stakeholders in education was advocated: teachers had to change from being primary suppliers of knowledge to facilitators, while learners had to assume much more responsibility for their learning. Major changes were also made in assessment, grouping of learners and curriculum content.

4.6.3 An exposition of Curriculum 2005

The introduction of Curriculum 2005 in South Africa is a watershed in the history and education of this country. According to Chisholm (2000: 4), “C2005 arose out of coalition processes designed to ensure the integration of education and training and the NQF”. The introduction of the new curriculum in 1995 was scheduled to be implemented by grades 1-12 by the year 2000. In 1997, the timeframe was extended to 2005. Thus the new curriculum became known as Curriculum 2005, and was considered synonymous with the principles of OBE.
4.6.3.1 Significant steps in the development of C2005

According to Chisholm (2000: 5), the DOE introduced C2005 in the following manner:

- Revision of the syllabus and subject rationalisation by the National Education and Training Forum following the 1994 elections.
- The development of the NQF prior to and immediately after the election resulting in the establishment of SAQA (1995) and operational in 1996.
- The production of a new curriculum framework for General Education and Training (GET) by the National Curriculum Development Committee (1995) and the Curriculum Management Committee (1996).
- The approval of the new curriculum by the Council of Education Ministers (1996).
- The working of the new national curriculum process in the GET phase in 1996.
- The construction of learning programmes and related documents and materials as well as training of trainers in 1997.
- The execution of a national pilot, as well as a national in-service education programme for teachers at 30 schools, which took place between 1 July and 31 December, 1997.
- Implementation in 1998.

Table 4. illustrates the Committees and various stakeholders involved in developing C2005.

The composition and functions of structures that developed C2005 posed further problems. Firstly, while a large number of people were involved in developing C2005, many subject authorities were left out of the operation of C2005. According to Seleti (in Chisholm 2000: 31), “Some of South Africa’s most well-known and respected historians, who were keen to participate in the development of a new curriculum felt excluded”. It appears that many who were involved were inexperienced with limited expertise. Secondly, representation on curriculum matters was inconsistent with members changing all the time, resulting in a lack of continuity amongst personnel, which affected the outcome of the design. Thirdly, a lack of continuity was also exhibited amongst structures in the development of C2005. For example, the terminology for C2005 was co-ordinated by different Committees resulting in inconsistencies and incoherence.
Table 4.1 Composition and Functions of Structures that Developed C2005
(Chisholm 2000: 31)

<table>
<thead>
<tr>
<th>Structure</th>
<th>Composition</th>
<th>Date</th>
<th>Functions</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td></td>
<td>General and Further Education and Training.</td>
</tr>
<tr>
<td>National Curriculum Development Committee (NCDC)</td>
<td>Replaced CFC as more representative structure.</td>
<td>March 1996</td>
<td>To consider public responses above to documents. To reach consensus on Lifelong Learning Development Framework for South Africa.</td>
</tr>
<tr>
<td>Learning Areas Committees (LACs for each LA)</td>
<td>Members nominated by stakeholders (30-40 on each LAC).</td>
<td>July 1996</td>
<td>To write a rationale for their LA and learning area outcomes, which reflected the critical, cross-field outcomes.</td>
</tr>
<tr>
<td>Co-ordinating Committees (one for each education phase)</td>
<td>Representative of education stakeholders (approximately 26 per coordinating committee).</td>
<td>January 1997</td>
<td>To identify cross-curricular issues in the learning areas and to cluster the LAC outcomes for the development of learning programmes.</td>
</tr>
<tr>
<td>Technical Committee assisted by Reference Group</td>
<td>Appointments made by nominations through the Govt Gazette Reference Group; three reps from each LAC and two teachers from each LA.</td>
<td>February 1997</td>
<td>To develop the work of the Co-ordinating Committees towards one broad curriculum (reduce Sos, endorse Acs and RSs)</td>
</tr>
<tr>
<td>Committees</td>
<td>DOE officials, provincial representatives and various stakeholders</td>
<td>September 1998</td>
<td>To develop performance indicators</td>
</tr>
<tr>
<td>Committees</td>
<td>DOE officials, provincial representatives and various stakeholders</td>
<td>Nov 1998 – Feb 2000</td>
<td>To develop Expected Levels of Performance</td>
</tr>
</tbody>
</table>

Before the shortfalls are discussed in C2005, a description is given of the relevant features of C2005.

4.6.3.2 Design Features of Curriculum 2005

Curriculum 2005: Lifelong Learning for the 21st Century (1997a), the Department of Education provides a policy framework for C2005 as well as all the relevant terminology synonymous with its implementation. The document also provides the National Qualifications Frameworks
structure, which is central to the implementation of C2005. A diagrammatic representation follows below, to illustrate the various components of the NQF.

**THE NQF STRUCTURE**

<table>
<thead>
<tr>
<th>NQF</th>
<th>Learning Band</th>
<th>Types of Qualifications and Certificates</th>
<th>Locations of Learning for Units and Qualifications</th>
</tr>
</thead>
<tbody>
<tr>
<td>8</td>
<td>Higher Education And Training</td>
<td>Doctorates Further Research Degrees</td>
<td>Technikons/Universities Tertiary/Research/Professional institutions</td>
</tr>
<tr>
<td>7</td>
<td>Higher Degrees Professional Qualification</td>
<td>Higher Degrees</td>
<td>Technikons/Universities Tertiary/Research/Professional institutions</td>
</tr>
<tr>
<td>6</td>
<td>Further Education And Training Certificate</td>
<td>First Degree Higher Diplomas</td>
<td>Universities/Technikons/Colleges Private/Professional institutions/Workplaces etc.</td>
</tr>
<tr>
<td>5</td>
<td>Diplomas Occupational Certificates</td>
<td></td>
<td>Universities/Technikons/Colleges Private/Professional institutions/Workplaces etc.</td>
</tr>
</tbody>
</table>

**FURTHER EDUCATION AND TRAINING CERTIFICATE**

<table>
<thead>
<tr>
<th>4</th>
<th>School/College/Training Certificates</th>
<th>Mix of unit credits from all</th>
<th>Formal High schools/Private/Public Schools.</th>
</tr>
</thead>
<tbody>
<tr>
<td>3</td>
<td>School/College/Training Certificates</td>
<td>Mix of unit credits from all</td>
<td>Technical Community/Police Nursing/Private/Colleges etc.</td>
</tr>
<tr>
<td>2</td>
<td>School/College/Training Certificates</td>
<td>Mix of unit credits from all</td>
<td>RDP and labour market schemes/Industry Training Boards/Unions/Workplace centres etc.</td>
</tr>
</tbody>
</table>

**GENERAL EDUCATION AND TRAINING CERTIFICATE (end of compulsory schooling e.g. ABET)**

<table>
<thead>
<tr>
<th>1</th>
<th>Senior Phase Grades 7-9</th>
<th>ABET Level 4</th>
<th>Formal Schools (urban/rural/farm/special/early childhood development centres)</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Intermediate Phase Grades 4-6</td>
<td>ABET Level 3</td>
<td>Work-based training/Occupational Training/RDP/Labour Market schemes/ Upliftment programmes/Community programmes/Development schemes</td>
</tr>
<tr>
<td></td>
<td>Foundation Phase Grades 1-3</td>
<td>ABET Level 2</td>
<td>NGO's/Churches/Adult centres/Private providers/Industry/Training Boards/Unions/workplace Training etc.</td>
</tr>
<tr>
<td></td>
<td>Preschool Year 5</td>
<td>ABET Level 1</td>
<td></td>
</tr>
</tbody>
</table>

*Figure 4.6 The National Qualifications Framework (NQF) (HSRC, 1995) (Steyn 1997: 160)*

It can be deduced that C2005 incorporates Early Childhood Development, General Education and Training, Further Education and Training and Adult Based Education and Training. However, at this stage information on the curriculum is available only for the GET bands (Chisholm, 2000: 33).
What follows is a brief exposition of the terminology central to Curriculum 2005. Firstly, knowledge and skills incorporated in C2005 are divided into 8 learning areas which affect all three phases. These are:

- Language, Literacy and Communication (LLC)
- Mathematical Literacy, Mathematics and Mathematical Sciences (MLMMS)
- Natural Science (NS)
- Technology (TECH)
- Human and Social Science (HSS)
- Economic and Management Sciences (EMS)
- Arts and Culture (A & C)

The GET band includes Grade 0 (Reception year) to Grade 9. This band is made up of three phases, namely, the Foundation Phase (Grades 1-3), the Intermediate Phase (Grades 4-6) and the Senior Phase (Grades 7-9). According to Steyn (1997: 160), ABET (levels 1-4) is also included in this band.

**i. The Foundation Phase**

The foundation phase includes Grades 0, 1, 2 and 3 (previously pre-primary, Sub A, B and Std 1). The curriculum is implemented through three learning programmes, namely Literacy, Numeracy and Life Skills. However, learners are taught topics and themes selected from all the eight learning areas.

In the foundation phase:

- Each learning programme has Specific Outcomes (SO).
- Each Specific Outcome has Assessment Criteria (AC).
- Each Assessment Criteria has Performance Indicators (PI).
• With the Assessment Criteria are samples/suggested learning activities in which learners could be involved while working towards achievement of a Specific Outcome (DOE, 1997b: ii).

The terminology used here is explained below.

In addition to working with learning programmes, teachers are expected to incorporate ‘phase organisers’ into their planning, facilitating and assessment. The rationale for the inclusion of the phase organisers is that learners would be given the opportunities to grow and develop as active, well-rounded citizens. The six phase organisers are:

• Personal development
• Health and safety
• Environment
• Society
• The learner as entrepreneur
• Communication (DOE, 1997b: iv).

Central to the Foundation Phase is the integration grid. The grid is the “grouping of the possible Specific Outcomes and assessment criteria’s from each learning area that has relevance to the learning programme and phase organisers of the foundation phase”. It is multi-functional in that:

• It facilitates the planning and development of learning activities for the learning programme.
• It provides for the development of teacher and learner support materials.
• It provides an easy reference to see how integration with other learning programmes is possible.
• It can be used as a reference to identify the outcomes that learners are to achieve.
• It makes possible the portability of the curriculum when learners move between provinces.
• It is used as an assessment tool for recording and reporting (DOE, 1997b).
ii. The Intermediate Phase

The Intermediate Phase includes Grades 4-6 (previously standards 2,3 and 4). While 8 learning areas are covered, in this phase they are combined to make up five learning areas, (DOE, 1997c: 8-9) namely:

- LLC
- MLMMS
- NS and TECH
- HSS and EMS
- AC and LO (see par. 4.5.3.2)

iii. The Senior Phase

This phase incorporates Grades 7-9 (previously standards 5, 6, 7). According to Mothata (1998: 21) “Grade 9 is regarded as the exit point, which means that learners receive a General Education and Training Certificate (GETC) at the end of this grade”. Grade 9 also signals the end of compulsory schooling. All 8 learning areas are covered in this phase (DOE, 1997d: 10).

Mothata (1998: 21) asserts that since Grade 9 serves as the exit point, it is imperative that learning programmes create opportunities for learners to be informed about the following:

- Career opportunities
- Further learning opportunities
- Entrepreneurial opportunities
- Their rights and responsibilities as citizens in democratic society

The time allocated per learning area in the different phases is illustrated below. According to the Department of Education (1997b: v) Learning programme document, “Notional time is not teaching time”. It is a guide for weighting and has implications for:

- Classroom transformation and co-operative teaching and learning;
- Group learners and team teaching.
The terminology central to the implementation of C2005 is explained, in the sections which follow:

### 4.6.4.1 Critical outcomes

Critical Outcomes are the “broad generic cross curricular outcomes which underpin the Constitution of South Africa and are adopted by SAQA” (DOE, 1997b). These outcomes will ensure that learners gain the skills, knowledge and values that will “allow them to contribute to
their own successes as well as to the success of their family, community and the nation as a whole” (DOE, 1997b). According to Bezuidenhout, Collighan and De Lange (1999: 6), SAQA has proposed the following critical outcomes:

- Identify and solve problems in which responses display that responsible decisions using critical and creative thinking have been made.
- Work effectively with others as members of a team, group, organisation and community.
- Organise and manage oneself and one’s activities responsibly and effectively.
- Collect, analyse, organise and critically evaluate information.
- Communicate effectively using visual, mathematical and/or language skills in the modes of oral and/or written presentation.
- Use science and technology effectively and critically, showing responsibility towards the environment and health of others.
- Demonstrate an understanding of the world as a set of related systems by recognising that problem-solving contexts do not exist in isolation.

In addition to the seven critical outcomes, Further Critical Outcomes (DOE, 1997e: 14-15) were formulated and are as follows:

- Reflecting on and exploring a variety of strategies to learn more effectively.
- Participating as a responsible citizen in the life of local, national and global communities.
- Being culturally and aesthetically sensitive across a range of social contexts.
- Exploring education and career opportunities.
- Developing entrepreneurial opportunities.

4.6.4.2 Specific outcomes

There are 66 specific outcomes in C2005 which were derived from the eight learning areas and these are “specification of what learners are able to do at the end of a learning experience” and include “skills, knowledge and values, which inform the demonstration of the achievement of an outcome or set of outcomes” (DOE, 1997: ix). The outcomes are not categorised according to any of the phases or grades.
4.6.4.3 Assessment criteria

According to the DOE (1997b), “The assessment criteria provide evidence that the learner has achieved the specific outcome. The criteria indicate in broad terms, the observable processes and products of learning which serve as culminating demonstrations of the learners achievement”. The document states further that the assessment criteria “do not themselves provide sufficient details of exactly what and how much learning marks an acceptable level of achievement of the outcome”. Hence they are explained in detail in the performance indicators.

4.6.4.4 Range statements

Each assessment criterion is described in terms of range statements, which “indicate the scope, depth, level of complexity and parameters of achievement”, including critical areas of content, processes and parameters of achievement in which the learner should engage to attain an acceptable level of achievement. The range statements provide direction but allow for “multiple learning strategies, for flexibility in the choice of specific content and process and for a variety of assessment methods” (DOE, 1997: viii). Thus they do not restrict learning merely to specific lists of knowledge items. The range statements have an additional function: they ensure that there is a balance between acquiring knowledge and skills and developing values. They also offer some direction in the choice of methodologies and teaching-learning strategies which support the achievement of outcomes.

4.6.4.5 Performance indicators

The Assessment Criteria and Range Statement offer “broad indications of what learners need to present before they are seen as having achieved the specific outcome” (DOE, 1997: vii). It is performance indicators, which offers details about content and processes that the learner is expected to master and about the learning contexts in which he/she will be engaged. Performance indicators “allow statements of the quality of achievement, that is, whether the achievement is at the level required or whether the learner has surpassed this level” (DOE, 1997).
4.6.4.6 Expected levels of performance

Expected levels of performance are written for the learning programmes of each grade. They are intended to “inform parents, educators and learners in transparent and rigorous ways what is considered quality work and what to aim for and whether their performance or products measure up to valid and credible standards nationally” (DOE, 2000a).

4.6.4.7 Organisers

Organisers, according to the DOE (1997b), are “the tools by which the outcomes are grouped for planning”. There are two types of organisers:

- Phase organisers
- Programme organisers

Phase organisers are prescribed for each learning area and phase. They are listed under the Foundation Phase. According to Chisholm (2000: 35), “Programme Organisers were used in the training of C2005. They are ‘themes’ chosen by teachers from everyday life to reflect local social priorities and are widely used as the starting point for the planning of lessons”.

4.7 IMPLEMENTATION OF C2005

The implementation of C2005 was officially set to take place in grade one classes in 1998, followed by grade two in 1999 and grade three and seven in 2000. Chisholm (2000), notes that Grades 1, 2, 3 and 7 have been implemented. The intention is to introduce C2005 in Grades 4 and 8 in 2001 and all the remaining grades by 2005.

4.7.1 Problems with implementation

The process of implementation presented major problems from the onset, as a result of financial, physical and human shortfalls. During the second half of 1997, pilot programmes were to be conducted for Grades 1-3 and 7-9, as preparation for full-scale implementation was to start in 1998 and run till 2001. The ISET programme aimed at reaching all 300,000 teachers in the system. Various setbacks scaled implementation plans to Grade 1. In August 1998, the
implementation of C2005 was postponed from 1999 to 2000 in the senior phase. Grades 3 and 7 were implemented in 2000. As a result of the delays the Minister requested advice on the implementation of Grades 4 and 8 in 2001.

According to Chisholm (2000), many of the difficulties were linked to the post-election context of social change. The first post-apartheid democratic election signalled pressure for immediate and visible change in all facets of life.

Thus, Chisholm (2000: 6) states “C2005 emerged as a plethora of new activities and policies vying for resources and attention: the restructuring of national and provincial education departments, the finance and governance of education, rationalisation and redeployment of teachers and creation of new legislative frameworks for policy across a wide field of spectrums”. In effect C2005 was seen as the new curriculum promulgating educational change. The drastic speed of change exerted severe pressure on the education system: it was apparently not carefully thought through in terms of piloting, resourcing and school workloads. Chisholm (2000: 6) argues further that “While better resourced schools coped but complained of excessive paperwork, inadequately resourced schools were in addition hampered by poor infrastructure, large classes and an absence of the technologies of teaching, including educational resources such as stationery”.

Given the problems surrounding C2005, a Review Committee was proposed in November 1999 and on 8 February 2000, the Minister of Education, Kader Asmal authorised the establishment of the Committee. The Committee was required to investigate:

- Steps to be taken in respect of the implementation of the new curriculum in Grades 4 and 8 in 2001.
- Key success factors and strategies for a strengthened implementation of the new curriculum.
- The structure of the new curriculum.
- The level of understanding of OBE.

The Minister also sought a review on the terminology of C2005 and its relation to implementation. Furthermore, he requested that the Committee examine all official evaluations conducted regarding implementation. The review process included:
4.8 CURRICULUM 2005 REVIEW

The Minister of Education (Professor Kader Asmal) announced the establishment of the Review Committee on C2005 on the 8th February 2000. The Committee under the chair of Professor Linda Chisholm was required to investigate and submit findings by the 31st May 2000 on the following:

- Steps to be taken in respect of the implementation of the new curriculum in Grades 4 and 8 in 2001.
- Key success factors and strategies for a strengthened implementation of the new curriculum.
- The structure of the new curriculum.
- The level of understanding of outcomes-based education (NAPTOSA, 2000).

The Minister “sought a substantive review of the new curriculum and its implementation…the rationale for and viability of the learning areas, learning programmes and phase organisers, the range of the knowledge to be covered, the assessment criteria and expected levels of learner achievement and the rationale for and the viability of the sixty six specific outcomes to be achieved in relation to critical outcomes. In addition an evaluation of and recommendations on the implementation of the new curriculum in the Foundation Phase and in Grade 7” (NAPTOSA, 2000: 2)

The first step involved analysing the methodology and findings of official and unofficial sources on the implementation of C2005. While the evaluations and reports highlighted the various stakeholders’ perceptions on implementation, the data collected revealed limitations. Many of the summaries emphasised the success of C2005 without any verification. Thus the review felt that research neglected reliability, validity and feasibility. The purpose of the site visits and interviews was to probe any gaps and discrepancies in the reports and evaluations. Selected
schools were visited and group interviews with principals, teachers and other stakeholders involved in education. Interviews were also conducted with provincial officials, trainers and publishers involved in curriculum implementation.

The purpose of public submissions was to attain a more objective perspective on the investigation. Submissions were received from a variety of stakeholders involved in OBE and C2005.

4.8.1 ‘Back to basics’

Many educationists and other stakeholders have argued for a return to the three basic R’s. According to Chisholm (2000: 13), “South Africa cannot return to a mythical past where everyone knew the three R’s; except for a few, the majority did not”. Today it is essential that children not only know the 3 basic R’s but are also able to apply them in real life situations, displaying appropriate levels of competence. South African education needs to employ alternative modes of teaching and learning that will equip the youth and adults of this country for the challenges of the 21st Century.

4.8.2 Implementation challenges

Chisholm (2000: 14) notes the variation of implementation on:

- Resources (for training and information, instructional materials [textbooks, exercise books, pens and pencils] and departmental support).
- Infrastructure (classroom space, desks, electricity, toilets, telephones, fax machines, photocopiers).
- Conditions of teaching and learning (large classes, pupil: teacher ratios, diversity of classrooms).
- Local and institutional capacity (staffing, leadership and management of schools, planning, administration).
- Will to implement (readiness of teachers to engage with new ideas and put them into practice).
- Pressure in the form of policy (mandated implementation).
• Support from implementing agencies (professional development, support and monitoring).
• Adequate and timeous information and training.
• Feasible time-frames.
• Participation.

All these conditions have varied in quality impacting heavily on implementation. Also Time
frames have been neither practical nor feasible both in the training of teachers and
implementation of C2005. It has been widely cited that a few days of training cannot alter the
traditional methods of teaching ingrained in teachers. Chisholm asserts further that the teacher
plays a very vital but demanding role in the implementation process: …teachers face inordinate
pressures and demands in their everyday lives. The cumulative impact of the negative public
image combined with the multitude of changes making themselves felt in schools and
classrooms is likely to backfire on the new curricula…

Without a change in attitude from the public sector and parents, teachers’ motivation, morale,
image and enthusiasm will be hampered.

4.8.2.1 Findings of the Review Committee on Curriculum 2005

The findings of the Review Committee were submitted to the Minister of Education on the 31st
May 2000. While there is a strong support for the principles of OBE, certain issues have to be
addressed to aid successful implementation (Chisholm, 2000: 18).

4.8.2.2 Structure and design of the curriculum

The language of OBE is far too complex while the terminology is extremely confusing. The
curriculum is overcrowded with 8 learning areas, implying that there is inadequate time for
advanced reading skills, foundational mathematics and essential concepts in Science. As far as
the progression, pace and sequencing of the design of C2005 is concerned, there appears to be
strong integration but weak conceptual coherence. While integration is supported by 12 critical
outcomes, 66 specific outcomes, learning programmes, phase organisers and programme
organisers, conceptual progression is neglected. According to Chisholm (2000: 18), “Range
statements, performance indicators and expected levels of performance are intended to provide
progression features but have failed to act as mechanisms which promote sequence, progression and pace”. This can be attributed to the reluctance of the curriculum planners to prescribe content.

4.8.2.3 Curriculum and assessment

There is a lack of agreement and conformity between curriculum and assessment practice. While there are many teachers who spend too much time on assessment, others neglect it and spend time on curriculum planning and design. Thus a coherent policy on assessment is essential.

4.8.2.4 Inadequate training

Many criticisms have been directed at the Cascade Model. Trainees have noted that district trainers themselves had no understanding of C2005, nor any theoretical background to OBE. Little attention was given to the significance and essence of C2005, while emphasis was placed on the explanation of the terminology. More attention was required in:

- Strengthening and adapting the models of training and the duration of teacher preparation.
- Addressing the quality of the trainers and training materials.
- Improving the quality of the content and methodology of training.
- Providing for follow-up in classroom support for teachers.

4.8.2.5 Learning Support Materials (LSMs)

Problems associated with the Learner Support Materials centred on availability, quality and the use of materials. The provision of the LSMs for C2005 also varied considerably from school to school and area to area. A low usage of learning materials was reported. This could be attributed to the standard and quality of the materials. Chisholm (2000: 19) finds that a “Lack of classroom space is often a major constraint on effective use of learning resources”. Lastly, in many cases teachers do not have the skills, resources and time to develop LSMs.
4.8.2.6 Follow-up support

Many teachers are of the opinion that departmental officials did not support them in the implementation of C2005 and do not value contributions made.

As Chisholm (2000: 19) states: “Provincial and district capacity to implement C2005 and provide support to teachers in classrooms is hampered by problems in the organisation of curriculum support structures, shortages of personnel, inadequate expertise of personnel and a lack of resources for supporting C2005”.

Thus there is a clear need for:

- Reorganisation and consolidation of curriculum structures at national, provincial and district levels.
- Reinforcement of personnel.
- Adequate resource provision.

4.8.2.7 Level of understanding

Understanding of C2005 differs within and between schools, as well as among trainers, officials and teachers. While a number of teachers affirm the fundamental principles of learner participation, activity-based education, flexibility and integration, many are confused about the construction and implementation of C2005. Evidence indicates that while there has been a paradigm shift in teaching and learning, teachers have a very puerile understanding of the doctrines of C2005/OBE, leading to very little transfer of learning in the classroom.

Stemming from these findings, proposals were made to modify C2005 and then rename it Curriculum 21. It should be noted at this stage that there is a paucity of information on Curriculum 21. Thus much of the discussion, which follows, is based primarily on the Report of the Review Committee C2005 chaired by Chisholm (2000) on the instruction of the Minister of Education.

4.8.3 Addressing problems with implementation: Proposals for revising C2005

The Review Committee examined the following aspects affecting C2005:
• The structure and design of the curriculum.
• Training, orientation and development of teachers to support curriculum change.
• Quality, use and availability of learning support materials.
• National, provincial and district-level support of the curriculum.
• Levels of understanding of C2005.

Recommendations for improvement were made on these aspects including the “pace and scope of implementation with reference to Grades 4 and 8’ (Chisholm, 2000: 90). For successful implementation all these aspects are reliant on:

• Resourcing of the curriculum.
• Feasible time-frames for implementation.
• Regular monitoring and review.
• Effective co-ordination at national and provincial level (Chisholm, 2000: 77).

According to the Review Committee, social justice, equity and development can only be attained through a high skill curriculum. Thus it is recommended that changes and fusions should be made to the General Education and Training band.

Human rights education and education for civic responsibility should be infused in all 8 learning areas emphasising anti-discrimination, anti-racism and so on throughout the curriculum, prioritising the implications for the 8 learning areas. Learning should exceed pre-C2005, and learners should be given the opportunity to tackle real life situations, thus empowering them and making their learning relevant and meaningful.

4.8.4 Recommendations for the structure of the curriculum

4.8.4.1 Reduction of the learning areas

The learning areas should be reduced from 8 to 6 in the GET band. The 6 learning areas would be:

• Languages
• Mathematics
• Natural Sciences
• Social Sciences (History and Geography)
• Arts and Culture
• Life Orientation

The rationale for reducing the learning areas from 8 to 6 is that insufficient time has been allocated to the development of knowledge, values and skills required for lifelong learning. Mention is also made of the shortage of teachers who have inadequate education and training in the areas of Economics, Technology and Management Sciences. An associated sector is a lack of equipment and learning support materials. It is thus possible to include exit requirements for these learning areas in GET. Schools are encouraged to introduce learners to technology, design, entrepreneurship, management principles and basic accounting when teachers are trained and resources become available. The Review Committee recommends that technology be incorporated into the Natural Sciences and that the features of technology, entrepreneurship and the use and interpretation of financial documents required in daily living be included in the Life Orientation learning area. Also, the training and re-training of school teachers should include applied sciences and other features of technology.

4.8.4.2 The development of high level skills

The Committee recommends the following:

• Comprehensive reading and writing skills.
• Foundational mathematical skills.
• Core concepts in the social and natural sciences.

In addition the GET curriculum should encourage:

• An understanding of the history of South Africa and its place in world history.
• An understanding of the environment and how to preserve it and key issues relating to space and place.
• Music, drama, dance and visual arts.
• Issues central to personal well-being and spiritual and physical growth.
4.8.4.3 Learning programmes

Learning programmes will replace learning areas. Allocations of learning programmes for the different phases include the Foundation Phase, with three programmes, while the Intermediate and Senior Phase have six programmes. The table below illustrates the learning programmes for the various phases, along with time allocations.

Table 4.2 Suggested Teaching Time of Learning Areas in the GET (Chisholm 2000:80)

<table>
<thead>
<tr>
<th>Foundation Phase</th>
<th>Intermediate and Senior Phase</th>
</tr>
</thead>
<tbody>
<tr>
<td>Literacy</td>
<td>Languages</td>
</tr>
<tr>
<td>- 40%</td>
<td>- 30%</td>
</tr>
<tr>
<td>Numeracy</td>
<td>Mathematics</td>
</tr>
<tr>
<td>- 30%</td>
<td>- 20%</td>
</tr>
<tr>
<td>Life Skills</td>
<td>Natural Sciences</td>
</tr>
<tr>
<td>- 20%</td>
<td>- 15%</td>
</tr>
<tr>
<td>Flexible Time</td>
<td>Social Sciences</td>
</tr>
<tr>
<td>- 10%</td>
<td>- 15%</td>
</tr>
<tr>
<td></td>
<td>Arts and Culture</td>
</tr>
<tr>
<td></td>
<td>- 7%</td>
</tr>
<tr>
<td></td>
<td>Life Orientation</td>
</tr>
<tr>
<td></td>
<td>- 8%</td>
</tr>
<tr>
<td></td>
<td>Flexitime</td>
</tr>
<tr>
<td></td>
<td>- 5%</td>
</tr>
</tbody>
</table>

4.8.4.4 Provision for a National Curriculum Statement

It is proposed that a National Curriculum Statement replace the current curriculum policy documents and produce statements for (Early Childhood Development), (General Education and Training), (Further Education and Training) and (Adult Based Education and Training). The National Curriculum Statement should clearly express what is to be learnt and at what level it is to be assessed. In addition, specific terminology should be defined.
4.8.5 Key features of the National Curriculum Statement

4.8.5.1 Critical outcomes

There is widespread consensus that the 12 statements are more than adequate for education. Thus it is suggested that the existing critical outcomes are retained. The single most important function of the critical outcomes is to guide the curriculum design process.

4.8.5.2 Learning area statements

Presently, each learning area has about 7 to 10 specific outcomes, which in some instances relate to the subject or area. In other scenarios they are social goals or values and in yet others they reflect critical outcomes. There are also outcomes that do not reflect the cognitive distinctiveness of the learning areas. Learning area statements should reflect the uniqueness and relevance of the learning area concerned as well as the learning goals to be attained.

4.8.5.3 Learning outcomes and assessment standards

The National Curriculum Statement should clearly indicate sequentially which knowledge is to be taught and learnt in each learning area, highlighting the levels of competence to be attained. It is proposed that this be done through “learning outcomes and assessment standards for each learning programme by grade” (Chisholm, 2000: 81). The learning outcomes for each grade should:

- Specify the sequence of the core concepts, content and skills to be taught in each learning programme at each grade level.
- Represent an integrated skill, concept and content statement of the projected learning outcomes.

The assessment standards should provide guidelines on formative and summative assessment, assessment strategies, and the kinds of tasks that could be set and answers to be expected. They should, lastly, describe the expected levels of performance for each learning outcome at each grade level. The learning outcomes and assessment standards should be developed around the GET (Grade 9) exit outcomes and exit assessment standards, which is then linked to the
entrance requirements for FET. They should also be viewed as minimum requirements to be attained.

The National Curriculum Statement contains four key design features which replace the eight design features of C2005. The table below demonstrates the key differences between the structure and design of C2005 and C21.

**Table 4.3 Differences between C2005 and the revised Curriculum 21**

(Chisholm 2000: 83)

<table>
<thead>
<tr>
<th>C2005</th>
<th>Curriculum 21</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Critical outcomes</strong></td>
<td><strong>Critical outcomes</strong></td>
</tr>
<tr>
<td>Broad, generic cross-curricular outcomes</td>
<td>The broad, generic cross-curricular learning goals of the GET</td>
</tr>
<tr>
<td><strong>Specific Outcomes</strong></td>
<td><strong>Learning Area Statements</strong></td>
</tr>
<tr>
<td>are derived from the learning areas and specify what learners are able</td>
<td>Define the learning area and its definitive features.</td>
</tr>
<tr>
<td>to do ‘at the end of a learning experience’ They are not grade</td>
<td></td>
</tr>
<tr>
<td>specific but teachers are expected to access learners in each grade</td>
<td></td>
</tr>
<tr>
<td>against these 66 outcomes</td>
<td></td>
</tr>
<tr>
<td><strong>Assessment criteria</strong> indicate, in broad terms, the observable</td>
<td><strong>Dropped</strong></td>
</tr>
<tr>
<td>processes and products of learning which serve as culminating</td>
<td></td>
</tr>
<tr>
<td>demonstrations of the learner’s achievements’</td>
<td></td>
</tr>
<tr>
<td><strong>Range statements</strong> indicate the scope, depth and parameters of</td>
<td>Dropped</td>
</tr>
<tr>
<td>achievement.</td>
<td></td>
</tr>
<tr>
<td><strong>Performance indicators</strong> provide details of the content and</td>
<td>Dropped</td>
</tr>
<tr>
<td>processes that learners should master. They ‘allow statements of the</td>
<td></td>
</tr>
<tr>
<td>quality of achievement’.</td>
<td>Dropped</td>
</tr>
<tr>
<td><strong>Expected levels of performance</strong> – are provided by grade and</td>
<td><strong>Learning Outcomes</strong> – specify the sequence of the core concepts, content</td>
</tr>
<tr>
<td>learning programme and are intended to inform teachers, parents and</td>
<td>and skills to be taught in each learning programme at each grade level.</td>
</tr>
<tr>
<td>learners of what is considered quality work and what to aim for</td>
<td><strong>Assessment Standards</strong> describe the expected level and range of performance</td>
</tr>
</tbody>
</table>

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4.8.6 Teacher orientation, training and support

Projections for improving training are grouped into long-term and short-term planning.

4.8.6.1 Long-term recommendations

The preparation of teachers is crucial in any implementation strategy to be effective, and requires:

- **A co-ordinated national strategy** in which pre-service and in-service training of teachers is linked with the Norms and Standards for Educators framework and labour agreement.

- **The statutory location of teacher preparation in institutions of higher education.** Without the active involvement of higher education institutions in decision-making on C2005, it will surely fail.

- **The development of partnerships** between provincial departments, NGOs and tertiary institutions should be encouraged for ongoing professional support.

4.8.6.2 Short-term recommendations

It is advised that the Cascade Model be strengthened and that more support be offered to teachers. Curriculum trainers include subject advisors and staff rendered in excess at national, provincial and district levels, should identified and trained at colleges to work together with NGOs. This would ensure quality and uniformity in training. National and provincial core teams should be provided with ongoing and up-to-date training in assessment and team teaching in order to offer on-site support and mentorships to teachers. Standard training should be provided throughout the country, so that quality assurance can be maintained and trainers accredited.
Lead Teachers (for example, HODs) should be identified, trained and provided with incentives to support school clusters. It is further advised that these teachers be trained at a university or college with replacement teachers provided.

4.8.7 Learning Support Materials (LSMs)

4.8.7.1 Quality and use of LSMs

- **Publishing**: it is imperative that the DOE creates a National Curriculum Statement for publishers to follow. This Statement should allow for the evaluation of publishers and must be accessible to them at least 2 years in advance of orders being placed.
- **Training**: teachers should to be trained in the choice, appraisal and use of textbooks in relation to the curriculum framework.
- **Reading Materials**: exclusive funding should to be organised by the Minister of Education for the provision of readers. Funds should be renewed every 4 years for all Foundation Phase learners so that children are able to progress consistently.

4.8.7.2 Availability of LSMs

- **Budget**: an appurtenant budget should be set-aside for LSMs in every province, separate from stationery budgets.
- **Approval processes**: it is recommended that the list for textbooks used in the Western Cape and Gauteng be made available to all provinces and that a nationalised list be compiled. Furthermore, a panel should also be appointed by the Minister to evaluate learning materials.
- **Delivery**: It is advised that direct liaisons be established through schools and suppliers to avoid delays and misunderstandings.
- **Management**: Management and co-ordination of the supply of LSMs should be overseen by a project team/manager.

4.8.8 National, Provincial and District-Level Support

Recommendations are made to improve support for the implementation of C2005 at the national, provincial and district levels through:
- Reorganisation of structures, roles and functions;
- Reinforcement of personnel, and
- Provision of necessary resources (Chisholm, 2000: 88).

4.8.8.1 Reorganisation

A single directorate should be established for the functionaries of C2005 in order to minimise conflicts between provinces. A directorate should be created in the DOE or in the office of the Director General to deal exclusively with C2005. At present, the directorate is shouldering many other responsibilities. A job-description should be provided for all C2005 officials so that progress can be evaluated. Planning and training delivery programmes should be organised in advance in order to minimise reported clashes of national and provincial programmes (Chisholm, 2000: 88-89).

4.8.8.2 Reinforcement of personnel

All relevant and necessary unfilled approved posts in curriculum units should be advertised or re-advertised and filled by the end of 2000. C2005 support staff should be established at provincial and district level according to the National Norms and Standards for numbers. Exclusivity with the dealing of GET/FET should also be taken into consideration. Administrative personnel should be set up to assist curriculum and support officials dealing with C2005 (Chisholm, 2000: 89-90).

4.8.8.3 Provision of resources

Vehicles should be provided for facilitating the implementation of C2005.

4.8.9 Scope and pace of implementation: Grades 4 and 8

It is widely acknowledged that the implementation of C2005 cannot continue in its present state. Implementation in Grades 4 and 8 should continue in 2001. However, the Economic and Management Sciences and Technology foci should be excluded from the Grade 8 syllabus, as there is a lack of resources and shortage of trained teachers. It is recommended that they be discontinued.
The National Curriculum Statement should be completed by June 2001 and C21 be introduced from mid 2001. A team should be appointed to gradually phase in C21 in 2001, after teachers have been orientated and trained (Chisholm, 2000: 90-91).

4.9 CONCLUSION

South Africa has a population of approximately 42,327,458 million people. Of these, approximately 6,930,023 million attend primary school, 3,377,302 million attend secondary school and Learners with Special Educational Needs (LSEN) are 29367 thousand totalling an amount of 10,333,349 million school going children. Number of students at university are approximately 326,354 thousand while students at technikons amount to 161,868 thousand. Citizens of South Africa are still classified according to their population group. In assessing development in the South African education system it is essential that a comparative analysis be done pre 1994 and post 1994. Prior to 1994 education in South Africa was based on the laws of apartheid, which discriminated among persons on the basis of colour, creed and language spoken, thus enhancing the status of some and denouncing the status of others. The education system in South Africa was designed to enhance the then government’s political status. Education was characterised by the use of two official languages namely: English and Afrikaans, 19 educational authorities and a failure to address cultural diversity. Post 1994 saw the advent of radical change in the education system of South Africa. Reasons for change were based on the fact that South Africa had to pay a high price for maintaining a differentiated system, which impacted on an already declining economy. Thus, education developed from two official languages to eleven official languages, one educational head with nine structures and the recognition of cultural diversity transforming education from National Christian Education to an education system based on democracy acknowledging the rights of each and every citizen of South Africa. With all the above in mind the government saw it prudent to adopt an internationally acceptable education system known as OBE, and in South Africa, Curriculum 2005. The perceived advantages of this new education system rest on the premises that it will enhance the status of all South African citizens preparing them for the workplace and ultimately, for life. However, the following have been found to be salient weaknesses in the implementation of OBE:
• The language of OBE is far too complex while the terminology is extremely confusing. The curriculum is overcrowded with eight learning areas with inadequate time for the three basic R’s (cf 4.7.2.2)

• There appears to be no agreement and conformity between curriculum and assessment practice. Teachers are required to reorganise the curriculum, increase the amount of time allocated for monitoring individual student progress against outcomes, administer appropriate forms of assessment for which no policy and support base exists. A serious problem in many schools is the large class sizes which make individual assessment impossible to carry out (cf 4.7.2.3).

• Learner support materials issued by the Department of Education have had little relevance for schools and teachers. The disparity in teacher training and large class numbers makes it difficult for teachers to develop their own LSMs (cf 4.7.2.5).

• Understanding of C2005 differed within and between schools, as well as among trainers, officials and teachers. Many appear to be confused about the construction and implementation of OBE (cf 4.7.2.7)

• To date no follow up support has been provided by the Department of Education to assist teachers in the implementation of OBE (4.7.2.6)

• The timelines and timeframes within which OBE was and is being implemented is too fast.

It is the researcher’s opinion that the implementation of OBE requires rigid planning and preparation and ongoing research which is also suitable for South Africa. The next chapter deals with the research design.
CHAPTER FIVE

RESEARCH DESIGN

5.1 INTRODUCTION

The aim of this chapter is to provide an exploratory study of the implementation of OBE in Australia and South Africa and also to gather descriptive data which compliments the literature study done in chapters 3 and 4. This chapter also aims to defend the research strategy in terms of the research conducted. In order to do defend this, discussion and descriptions will be provided on the research undertaken, the particular methods used to carry out the research and lastly, the subjects, site, conditions of research and observations made. The research was undertaken in two countries, namely, Australia (a first world country) and South Africa (a developing country) (cf 1.1.2). The figure below illustrates the number of classrooms visited in Australia (11) and South Africa (11).

![Countries where sample is obtained](image_url)

FIGURE 5.1 Countries where sample was obtained
5.2 RESEARCH DESIGN

This section explains the choice of sites, the procedures followed in gaining access to these sites, the selection of participants and the research programme. It should be noted at this point that much of the research strategy employed in this research has been based on a similar study conducted by the Centre for Educational Research and Educational Policy (CEREP) at the University of Durban-Westville under the auspice of Professor Jonathan Jansen. He granted permission for the researcher to make use of the questionnaires and any other available data on the subject.

5.2.1 Site selection

As mentioned earlier in the chapter, the research was conducted in Australia and South Africa. The researcher has already explained her choice of Australia as a point of comparison for the implementation of OBE (see par. 1.1.2). The graph below illustrates specific areas where the research was undertaken highlighting the percentage of research conducted in each area.

![Graph showing percentage of research in Australia and South Africa](image)

**FIGURE 5.2 Areas where research was undertaken**
The tables below illustrates the sites number of schools and classes visited in Australia and South Africa.

Table 5.1 Sites, number of schools and classes visited in Australia

<table>
<thead>
<tr>
<th>Site</th>
<th>No of Schools</th>
<th>No of Classes</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Northern Territory</td>
<td>3</td>
<td>4</td>
<td>18.2 %</td>
</tr>
<tr>
<td>New South Wales</td>
<td>4</td>
<td>5</td>
<td>22.7 %</td>
</tr>
<tr>
<td>Victoria</td>
<td>2</td>
<td>2</td>
<td>9.1 %</td>
</tr>
<tr>
<td></td>
<td>9</td>
<td>11</td>
<td>50 %</td>
</tr>
</tbody>
</table>

Table 5.2 Sites, number of schools and classes visited in South Africa

<table>
<thead>
<tr>
<th>Site</th>
<th>No of Schools</th>
<th>No of Classes</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Ex: HOD</td>
<td>1</td>
<td>3</td>
<td>13.63%</td>
</tr>
<tr>
<td>Ex: HOR</td>
<td>1</td>
<td>3</td>
<td>13.63%</td>
</tr>
<tr>
<td>Ex: NED</td>
<td>1</td>
<td>3</td>
<td>13.63%</td>
</tr>
<tr>
<td>Ex: DET</td>
<td>1</td>
<td>2</td>
<td>9.1%</td>
</tr>
<tr>
<td></td>
<td>4</td>
<td>11</td>
<td>50%</td>
</tr>
</tbody>
</table>

In Australia research was conducted in the Northern Territory, New South Wales and Victoria. A period of ten weeks was spent in Australia to observe the implementation of OBE. Limited resources and time meant that the researcher was unable to conduct research in the rest of Australia. In South Africa the research was limited to one province, KwaZulu-Natal. This province was selected for practical reasons, since the researcher is based in this province and has easy access to the schools, as a result of the role she played in facilitating and convening OBE workshops on behalf of the Department of Education for foundation phase teachers (cf 1.1.2).
5.2.1.1 Criteria for selection

Primary schools in South Africa were selected on basis of ex-Departments of Education prior to 1994 and that all schools had begun implementation of OBE in the Foundation Phase. The four schools in KwaZulu-Natal included:

- A very well resourced school with excellent infrastructure, for example, a typical urban-based multiracial school (ex-NED);
- A school with reasonable infrastructure but less resourceful than a former NED school (ex-HOR);
- A school in a peri-urban area in which there is a deteriorating infrastructure (ex-HOD),
- A school in a rural area far removed from a town with a very poor infrastructure and lacking the basic necessities (ex-DET).

In Australia an attempt was made to visit primary schools with a similar infrastructure as that of South Africa. Thus the three types of schools visited were:

- Very well resourced urban schools with excellent infrastructure. This was a private school;
- Ordinary state schools in an urban area, and
- State schools in a rural area.

5.2.1.2 Access through gatekeepers

“When working with any administrative hierarchy such as a school district, it is very important to follow appropriate channels of authority” (Borg & Gall, 1989: 104). Before attempting to visit schools in Australia and South Africa, permission was sought from the relevant administrators to carry out the research and gain entry into the various schools.

Access to the various schools in the Northern Territory was facilitated by educational authorities through the provision of contact persons and telephone numbers in the various schools. In this manner access to the schools was expedited. In New South Wales, the administrator of primary schools provided access to only one state primary school. The researcher was free to make contact with a school of her choice as long as the school was willing to assist in the research programme. The researcher experienced many problems here,
as schools appeared to be afraid and skeptical about research undertaken in the area of OBE (referred to as profiling). Nevertheless, the researcher was able to locate schools that were willing to participate in the research programme. In the state of Victoria the researcher was given ‘Carte blanche’ and could gain access to any school to enable her to conduct the research. However, because of time constraints, she was able to visit only two schools. The principals requested that the researcher explain her research programme to the staff of the school before consent was granted. Thus consent was granted via an arrangement between management and staff. Furthermore, it was requested that no audiovisual recordings be done.

5.2.2 Sample size

It should be noted at the onset that a very small sample was used in the present research programme. The number of schools visited in Australia varied from three in the Northern Territory, four in New South Wales and two in Victoria. In South Africa the researcher visited four schools in Kwa-Zulu Natal. Research in Australia and South Africa comprised visits to eleven classrooms in each country in the above schools. In Australia the researcher in most instances was only allowed one classroom visit, while in South Africa she was allowed to observe all three grades in the foundation phase.

5.2.3 Researcher’s role

The research has been carried out in a qualitative manner. The design is holistic, searching to understand the whole picture of the implementation of OBE. It looks at relationships and inter-relationships within particular settings and “is focused on understanding a given social setting” (Janesick, 1994:212). This research demanded that the researcher remain in the research setting for a period of time, in which she became a ‘research instrument’, forcing her to develop her ability to observe classroom teaching and practices, and to develop her ability to interview others. The design incorporated “room for description of the role of the researcher” and required an “ongoing analysis of data” (Janesick in Kilian, 1996: 118).

5.2.3.1 Statement of subjectivity

A certain amount of bias and subjectivity can be inferred upon the researcher, as she is not only familiar with the schools visited in Kwa-Zulu Natal, South Africa but has also been engaged in foundation phase teaching (junior primary) for the past 13 years and occupies the post of Head
of Department at her school. The researchers familiarity with the schools in Kwa-Zulu Natal through the process of facilitating OBE workshops has allowed her to establish a relationship of trust with the teachers observed. The researcher served as a facilitator on behalf of the Department of Education (KwaZulu-Natal) at introductory workshops for the Foundation Phase on OBE. She then conducted pilot studies using abbreviated samples to establish whether the workshops had served in their purpose in preparing teachers for the implementation of OBE and whether the teachers themselves understood the concept of OBE. Research was also undertaken amongst facilitators at the same workshop to establish whether this core group of educators had readily understood the philosophy of OBE and were able to cascade it down to the teachers. The pilot study was conducted through means of a questionnaire and close observation of the facilitators by the researcher. She was responsible for retraining the facilitators on instruction from the district head, as they were not adequately prepared by departmental training to facilitate OBE workshops. Having concluded the pilot study in South Africa, the researcher proceeded to conduct her research in Australia. Although not central to the theme of the research, the pilot study to some extent informed the direction of the research undertaken in Australian and South African schools. In Australia it should be noted that this researcher did not have enough time to develop a relationship of trust with the teachers. However, the researcher was viewed as a colleague which did assist in establishing a rapport with teachers.

5.2.3.2 Confidentiality of participants

At all times the researcher asked for openness and honesty with the teachers, principals and educational authorities in Australia and South Africa. Anonymity and confidentiality was assured from the onset of the research programme. Anonymity of the school names was guaranteed to all the principals in the schools visited as well as from publications other than this dissertation. The aim of the dissertation was explained in detail (cf 1.3) with emphasis on improving education through research.

5.2.4 Data collection

Data collection strategies refer to the tools of research or how researchers conduct their research (LeCompte & Preissle in Kilian, 1996: 121). Hammersley (1990: 30) states that “it is characteristic of ethnography to employ a range of data sources”. Observation, interviews
audio and video-recording, documents and questionnaires were utilised in the present research, which is characteristic of qualitative research.

5.2.4.1 Classroom observation

Observation "entails direct examination and recording of an ongoing activity" (Neter, Wasserman & Whitmore, in Kilian, 1996: 121). The present researcher spent a number of days in each classroom in both countries.

Borg and Gall (1989) draw distinctions between the terms 'participant observer' and the 'nonparticipant observer'. Participant involvement takes various forms: active involvement in the situation by the researcher; total participation in which the researcher becomes a full member of the group and her role as observer is hidden, or the observer may still function primarily as a participant, but keeps her observational role as unobtrusive as possible. During nonparticipant observation the "nonparticipant observer minimizes interactions with the subjects being observed and attempts to obtain as complete a record as possible of behaviour relevant to the observer's interest" (Borg & Gall, 1989: 396). The present researcher set out to conform to the characteristics of the nonparticipant observer. However, in order to obtain information on the subject's attitudes and perceptions concerning the implementation of OBE (through the completion of the questionnaire), the researcher interacted and assisted the subjects where necessary and when approached to do so. Thus it would be safe to say that the research involved both participant and non-participant observation.

5.2.4.2 Interviews

Vygotsky (in Seidman, 1991: 1) claims that "Every word that people use in telling their stories is a microcosm of their consciousness". Individual's consciousness provides information on complicated educational issues (Seidman, 1991). Interviewing thus provides a means of inquiry through language. The purpose of interviewing "...is an interest in understanding the experience of other people and the meaning they make of that experience" (Seidman, 1991: 3). "It is a powerful way to gain insight into educational issues through understanding the experience of individuals whose lives constitute education" (Seidman, 1991: 7).

The researcher conducted phenomenological based interviewing, which combines life history interviewing and focused in-depth interviewing (Seidman, 1991: 7). The majority of the
questions posed to the interviewees by the interviewer (researcher) were open-ended, in anticipation of the reconstruction of their experience by the interviewees within the topic under study. The interviewer explored relevant issues in the subject area by examining the concrete experiences of people in that area and the meaning they attributed to their experience. This was conducted through a number of separate interviews with most of the interviewees, each centring on a separate issue in order to remain focused. Thus Interview One generally focused on the life history of the interviewee and (their past) experiences in light of the topic up to the present time. Interview two concentrated on the concrete details of the participant’s present experience in the area of study. Part of this entailed a job description in the area of the study. Interview Three focused on the meaning of the interviewee’s experiences. However, in some instances it was impossible to ascertain meaning because of the time constraints on the part of the interviewees. In some cases Interviews One, Two and Three were conducted on the same day. Interviews were conducted both telephonically and face-to-face. According to Seidman (1991: 15), “As yet there are no absolutes in the world of interviewing”. The length of the interviews varied with the participants being interviewed. Generally the first two interviews were very informal while the last was structured, with specific issues being addressed. Participants also had a stake in the amount of time required for the interview. Interviews were spaced from 3 days to a week apart, allowing “time for the participants to mull over the preceding interview but not enough time to lose the connection between the two” (Seidman, 1991: 14).

5.2.4.3 Questionnaires

Principals and teachers were always informed of what the researcher was doing and were given the option to review and see all the videotapes that were made of them. The interview schedule administered through the filling in and completion of the questionnaire was done in front of the teachers, except when the final comment required inferences to be made by the researcher. This was administered privately. Teachers were also given the freedom to question the researcher at any given time during the research programme and were encouraged to proceed with classroom practice and teaching that they were employing before the researcher’s visits to the class.

The questionnaire material used in Australia and South Africa differed slightly. The questionnaire is summarized below, indicating sections omitted in Australia.
• **A. School Profile:** A profile of the school, assembling data about human and material resources available in the school.

• **B. Teacher characteristics profile:** A profile of each teacher observed thereby developing a portrait of the teacher in terms of formal experience, qualifications etc.

• **C. Classroom Resource Profile:** A profile of the classrooms observed collecting data on the resources available in each classroom.

• **D. Grouping profile:** A profile on the types of grouping employed by the various teachers together with the number of learners in the class.

• **E. Assessment:** A profile on assessment strategies employed by teachers extending to the basis of promotion in each grade.

• **F. Classroom observation schedule:** An observational protocol was used which consisted of specific indicators showing teachers’ understanding of OBE.

• **G. Teacher interview schedule:** A detailed teacher interview was conducted after the observations and audiovisual recordings; these open-ended interviews probed the teachers understanding of OBE.

• **H. Teacher questionnaire:** A profile of the teaching practices that allowed comparison between teaching approaches and strategies before the introduction of OBE (prior to 1998) as opposed to after the implementation of OBE (since January 1998). This part of the questionnaire was left out in the research programme in Australia, as the researcher was not sure about how long the implementation of OBE was effectual in Australia. However, these questions were posed to the teachers while interviewing them.

The researcher acknowledges that the exclusion of part of the questionnaire in the research programme can viewed as an error on her part. However, attempts were made to rectify this by taking down notes on that specific section. As far as possible, the general procedure has been outlined as accurately as possible. This has been done to try and ensure that little threat is made against the reliability and credibility of this research.

5.2.4.4 Recording and transcribing

The research findings presented in this dissertation can be authenticated by the various audio and visual recordings, which are available to the reader. Interviews with participants were carried out by means of audio recording as the researcher preferred not to take notes for fear of distracting interviewees. Transcriptions consist of verbatim written records from the taped
sermons. Video recordings were used to observe classroom teaching practices in Australian and South African schools. Videotaping was deliberately administered so that the reader could check the reliability of the observational data. Since the researcher was expected to make a high level of inference she required an opportunity to carefully observe the classroom practices on a number of occasions before making a rating. However, in some instances videotaping was not administered since permission was not granted.

5.2.5 Data analysis

According to Schumacher and McMillan (1993, 480-481) data analysis, entails continuous discovery throughout the entire study so as to identify tentative patterns, categorizing and ordering data after data collection, qualitatively assessing the trustworthiness of the data, so as to refine one’s understanding of the patterns and writing an abstract synthesis of the concepts. In the present research textbooks, periodicals, Departmental documents and policies and curriculum materials on OBE were used. Other types of texts and documents became useful for evaluation and analysis in the course of the research: the completion of the questionnaires during the research programme itself, field notes and video recordings to refer to. The field notes were read and re-read as well responses to questionnaires to ascertain if any patterns emerge. According to Silverman (1994: 26-27), the real use of these data lies in the fact that they are naturally occurring and available, and not contrived for distorting the research results.

5.2.6 Limitations of research

The researcher made use of a small sample approach. Therefore, the data collected is of limited predictive value. However, the aim of the research was to understand the implementation of OBE by means of a qualitative investigation of classroom practice in a small sample of South African and Australian schools using multiple methods of data collection. Moreover, the study does not claim to generalise the findings are typical of all schools and teachers. However, had the sample used been larger then a hypotheses could have been tested using the same techniques employed in the present research thus generalising the findings to other teachers and schools.
5.2.7 Validity and reliability

According to Bogdan and Biklen (1982: 44), reliability in qualitative research is viewed as the fit between what is recorded as data and what has actually occurred in the setting under study, rather than literal consistency in results of observations made by different researchers across different observations. In order to ensure such a fit, all data was collected, analysed and interpreted in a uniform manner during the present investigation and the researcher strove to avoid disturbing the natural flow of information from informants as little as possible.

Furthermore, validity in qualitative research is also largely determined by the extent to which the data represents the actual subjective experience of the participants. The validity of information is primarily determined by the participant’s willingness to freely communicate his/her experiences to the researcher in an atmosphere of trust and comprehension (Benny & Hughes, 1956: 139). In terms of this criterion for validity, in the case of this investigation, all informants voluntarily shared information and were sincerely motivated to share their experiences in this project. Several endorsed the project, describing it as worthwhile and expressing the hope that it would be of help towards the further implementation of OBE. In all interviews the researcher experienced a high level of rapport with the informants. During the data analysis and before the actual writing of the research findings, the researcher returned to a number of informants for brief confirmation of some of the key issues gleaned from the interviews and to remove any lack of clarity.

5.2.8 Triangulation of findings

The most powerful tool used in the research programme was triangulation. Triangulation may be defined as “using several methods to study the same object” (Borg & Gall, 1989: 393). The researcher attempted to collect the same data from different samples at different times and in different places. Triangulation is useful when checking on the validity of descriptive claims (Hammersley, 1990: 84). By employing triangulation the researcher hoped to confirm the different data sources used in an integrative manner. In the present research interviews, observations in classrooms and questionnaires were used comprehensively to justify the researchers findings.
5.3 DISCUSSION OF FINDINGS

The researcher has attempted to place the context of her research in as natural a setting as was possible. The sections below discuss in greater depth key elements related to the implementation and understanding of OBE in selected Australian and South African schools. The material is organised as follows for greater clarity: descriptions of schools, number of learners, classroom resources, use of group work, instruction and assessment. Five main areas are identified:

- Description of schools
- Classroom resources
- Use of group work
- Instruction: Teachers understanding of OBE
- Assessment: Criteria used to assess competence, basis for promotion and critical incidents.

5.3.1 Description of schools

Schools visited in the one territory and two states will be described below.

5.3.1.1 Australia

Schools in the Northern Territory (NT)

After discussions with the educational authorities in the NT, it was jointly decided which schools would be part of my research in the NT.

School A (Private School) caters entirely for the Aboriginal population close to a town. While it is categorised as a secondary school catering for Year 7 to Year 9 learners, learners are taught at Year 1 to Year 2 level. A distinct feature of this particular school is its abundant supply of resources and educational infrastructure. School B (Peri-urban state school) is situated on the outskirts of Alice Springs. It has a cosmopolitan make-up catering for various communities in the area. Resourcing at this school appeared to be more than adequate. School C (Rural state school) is situated in the deep rural areas of Alice Springs in the Northern Territory. A one-man school, with an enrolment of 20 pupils, it also caters entirely for
Aboriginal children. Although not as well supplied with educational infrastructure as School A, the school is adequately supplied with resources.

The number of learners in the classes visited is displayed in the table below.

<table>
<thead>
<tr>
<th></th>
<th>Number of learners</th>
<th>Grade</th>
</tr>
</thead>
<tbody>
<tr>
<td>School A</td>
<td>14</td>
<td>Year 7</td>
</tr>
<tr>
<td></td>
<td>12</td>
<td>Year 7</td>
</tr>
<tr>
<td>School B</td>
<td>24</td>
<td>Combined Transitional/Year 1</td>
</tr>
<tr>
<td>School C</td>
<td>20</td>
<td>Combined Early Childhood/Primary</td>
</tr>
</tbody>
</table>

From the above it was established the teacher-pupil ratio was found to be extremely managing; ranging between 14-24 with the assistance of teacher aides in most instances.

**New South Wales (NSW)**

Given educational policy of the Department of Education in Sydney, access to state schools was limited to one school with no prior arrangements made in terms of state policy, one year in advance (Bradburn 1999). However, two other private schools and one Catholic school were observed.

**School D (Peri-urban state school)** is a state primary school situated in downtown Sydney. The school caters for a cross section of different communities, both indigenous and immigrant communities. The school was adequately supplied with resources. **School E (Private School)** is situated in one of the more picturesque suburbs of Sydney. It is multilingual, catering for a more affluent cross-section of indigenous and immigrant communities. It is Presbyterian controlled and like many other private schools in Australia, is well supplied with educational resources and facilities. **School F (Catholic School)** is located in one of the less affluent suburbs of Sydney, catering essentially for children of immigrant workers. It is moderately
supplied with resources. School G (Private School) is situated in the heart of Sydney and is characterised as a Grammar School offering a variety of languages as a medium of instruction. Like School E, it is abundantly resourced for optimum learning to take place. A distinct feature is that the playground facilities for learners are situated on top of the building.

The number of learners in the classes visited is exhibited in the table below.

**TABLE 5.4 Number of learners per class**

<table>
<thead>
<tr>
<th>School</th>
<th>Number of Learners</th>
<th>Grade</th>
</tr>
</thead>
<tbody>
<tr>
<td>School D</td>
<td>31</td>
<td>Year 2</td>
</tr>
<tr>
<td></td>
<td>27</td>
<td>Kindergarten/Transition</td>
</tr>
<tr>
<td>School E</td>
<td>24</td>
<td>Year 1</td>
</tr>
<tr>
<td>School F</td>
<td>19</td>
<td>Combined Year 4 and 5</td>
</tr>
<tr>
<td>School G</td>
<td>10</td>
<td>Kindergarten-Preschool</td>
</tr>
</tbody>
</table>

The number of learners varied from 10-31 in the classrooms visited indicating manageability with the assistance of teacher and parent aides in most classes.

**Schools in Victoria**

Permission was granted by the educational authorities to make contact with schools that were willing to participate in the research. However, the researcher visited only two schools, as her visa in Australia was about to expire.

School H (State School) is suburban, situated within the metropolitan area of Melbourne, and catering for learners of all types. A particular feature of this school is that the infrastructure is disabled-friendly. The school is more than adequately resourced for optimum learning to take place. School I (Catholic School) is situated in a more affluent part of Melbourne and is a predominantly Catholic school. It appeared to be adequately resourced with the necessary infrastructure in place.

The table below illustrates the number of learners present in the classes visited.
The number of learners in the schools visited ranged from 24-27 indicating that the teacher - pupil ratio was manageable.

**TABLE 5.5 Number of learners per class**

<table>
<thead>
<tr>
<th></th>
<th>Number of Learners</th>
<th>Grade</th>
</tr>
</thead>
<tbody>
<tr>
<td>School H</td>
<td>27</td>
<td>Combined (Kindergarten-Year 2)</td>
</tr>
<tr>
<td>School 1</td>
<td>24</td>
<td>Year 1</td>
</tr>
</tbody>
</table>

5.3.1.2 South Africa

Thus the four schools visited in KwaZulu Natal will be referred to in numerical form indicating the Ex-Department to which the school belonged:

- School 1: Ex- House of Delegates (HOD)
- School 2: Ex- House of Representatives (HOR)
- School 3: Ex- Natal Education Department/House of Assembly (NED/HOA)
- School 4: Ex- Department of Education and Training (DET)

School 1 formerly run under the HOD is situated in a peri-urban area. While supplied with the basic requirements for a school, most of its facilities were found to be in a state of disrepair. Electricity cables provided for the school are non-functional. This dilapidated state can be attributed to a lack of financial support from the parent community as well as a low limited monetary allocation from the educational authorities. While functional resources for teachers are present, they are sadly lacking for the pupils: Teachers are provided with a table and chair but there is a lack of desks, chairs and working space for pupils. School 2 (ex HOR) previously a state aided school under the aegis of the Roman Catholic Church, AND has since been converted to a fully-fledged state school. Given the previous involvement of the Roman Catholic Church as well as the support of parents, this school is infinitely better resourced than School 1. It appears adequately resourced for learning to take place, computers available for learners to utilise. School 3 is a previous Model C school previously running under the auspices of the NED. As indicated in the literature review, white education in South Africa was characterised by schools which were very well resourced, an observation confirmed at this
particular school. The school is more than adequately resourced for optimum learning to take place, with excellent sporting facilities as well as a fully equipped reception class available on site. Like School 2, this school also houses computers. Certainly school 3 was the most abundantly resourced of the four schools visited. School 4 is a previously DET public school situated in the deep rural areas of KwaZulu-Natal. Unlike School 3, which is multiracial, this school has only black students. Like many of the other black schools in the apartheid regime, it is very poorly resourced. Basic requirements such as water, electricity and conventional toilet facilities are missing. A significant feature of the school is the fact that almost 90% of the parents whose children are enrolled at the school are illiterate. Extreme levels of poverty and far distances from the school mean that pupils are often absent. While the functional necessities for teachers are provided, resources are lacking for pupils. They are even compelled to provide their own seating where necessary.

The table below illustrates the number of learners per class in the schools visited.

<table>
<thead>
<tr>
<th>School</th>
<th>Grade 1</th>
<th>Grade 2</th>
<th>Grade 3</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>25</td>
<td>57</td>
<td>51</td>
</tr>
<tr>
<td>2</td>
<td>37</td>
<td>38</td>
<td>38</td>
</tr>
<tr>
<td>3</td>
<td>23</td>
<td>22</td>
<td>24</td>
</tr>
<tr>
<td>4</td>
<td>60 (Grades 2 and 3)</td>
<td>Combined 60</td>
<td></td>
</tr>
</tbody>
</table>

5.3.2 Teacher profiles

In this paragraph a summary is made of professional qualifications of teachers, teaching experience, age and qualifications.
### TABLE 5.7 Teacher Characteristics Profile: Australian Schools

<table>
<thead>
<tr>
<th>School</th>
<th>Teaching experience of teacher observed</th>
<th>Age</th>
<th>Qualifications: Year attained Most recent</th>
</tr>
</thead>
<tbody>
<tr>
<td>A</td>
<td>21 years 38 years</td>
<td>41+</td>
<td>Bachelor of Education (1993)</td>
</tr>
<tr>
<td></td>
<td></td>
<td>41+</td>
<td>Bachelor of Education (1987)</td>
</tr>
<tr>
<td>B</td>
<td>32 years</td>
<td>41+</td>
<td>Bachelor of Education (1992)</td>
</tr>
<tr>
<td>C</td>
<td>19 years</td>
<td>41+</td>
<td>B.A., Diploma in Education (1980)</td>
</tr>
<tr>
<td>D</td>
<td>14 years 27 years</td>
<td>31-40</td>
<td>Diploma of Teaching-K.G (1985)</td>
</tr>
<tr>
<td></td>
<td></td>
<td>41+</td>
<td>Diploma of Teaching (1971)</td>
</tr>
<tr>
<td>E</td>
<td>27 years</td>
<td>41+</td>
<td>Bachelor of Education (1997)</td>
</tr>
<tr>
<td>F</td>
<td>25 years</td>
<td>41+</td>
<td>Bachelor of Education (1990)</td>
</tr>
<tr>
<td>G</td>
<td>8 years</td>
<td>31-40</td>
<td>Bachelor of Education (1990)</td>
</tr>
<tr>
<td>H</td>
<td>11 years</td>
<td>31-40</td>
<td>Diploma of Teaching (1988)</td>
</tr>
<tr>
<td>I</td>
<td>1 year</td>
<td>20-25</td>
<td>Bachelor of Arts and Teaching (1997)</td>
</tr>
</tbody>
</table>

### TABLE 5.8 Teacher Characteristics Profile: South African Schools

<table>
<thead>
<tr>
<th>School</th>
<th>Teaching Experience of teacher observed</th>
<th>Age</th>
<th>Qualifications: Year attained Most recent</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>18 years 15 years 28 years</td>
<td>31-40</td>
<td>Bachelor of Education (1992)</td>
</tr>
<tr>
<td></td>
<td></td>
<td>31-40</td>
<td>Higher Diploma in Education (1996)</td>
</tr>
<tr>
<td></td>
<td></td>
<td>41+</td>
<td>Diploma in Education (1998)</td>
</tr>
<tr>
<td>2</td>
<td>16 years 19 years 10 years</td>
<td>41+</td>
<td>Higher Diploma in Education (1979)</td>
</tr>
<tr>
<td></td>
<td></td>
<td>41+</td>
<td>Diploma in Education (1981)</td>
</tr>
<tr>
<td></td>
<td></td>
<td>31-40</td>
<td>F.D.E (School Management) (1998)</td>
</tr>
<tr>
<td>3</td>
<td>18 years 17 years 14 years</td>
<td>31-40</td>
<td>Higher Diploma in Education (1987)</td>
</tr>
<tr>
<td></td>
<td></td>
<td>31-40</td>
<td>Higher Diploma in Education (1981)</td>
</tr>
<tr>
<td></td>
<td></td>
<td>31-40</td>
<td>Higher Diploma in Education (1983)</td>
</tr>
<tr>
<td>4</td>
<td>21 years 12 years</td>
<td>41+</td>
<td>Primary Teacher’s Course (1978)</td>
</tr>
<tr>
<td></td>
<td></td>
<td>31-40</td>
<td>Higher Diploma in Education (1998)</td>
</tr>
</tbody>
</table>
5.3.3 Classroom observation

Research in Australia and South Africa was divided into three stages: observation, recorded protocols and interviews with teachers and educational authorities. The stages set out were not always sequential, as discussed below.

On arrival in schools observations of teaching practice was undertaken by the researcher. Classroom teaching was observed over a number of days before audiovisual recordings were made. The observation period differed from school to school. In some schools teachers were reluctant to have the researcher present in the class for a number of days. Thus recordings were done much sooner than anticipated. A trial run was used as means of acquainting the teachers and learners with the camera and also to set the teachers at ease since the majority was nervous and afraid. Thus the researcher took her cue from the teachers as to when they were ready for formal recordings.

The last stage involved interviews with the principals and teachers through the filling in of a questionnaire. One-to-one interviews were also held with the principals, educational authorities and, in one instance, a parent.

A diagrammatic representation follows of the research programme.
<table>
<thead>
<tr>
<th>SCHOOL</th>
<th>DATE</th>
<th>YEAR</th>
<th>AUSTRALIA</th>
<th>SOUTH AFRICA</th>
</tr>
</thead>
<tbody>
<tr>
<td>A</td>
<td>2/2/99</td>
<td>Level 7</td>
<td>9:00 - 12:00</td>
<td>1</td>
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**INTERVIEWS**

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5.3.3.1 Classrooms in Australia

Descriptions of classrooms visits are done according to the following headings:

i. Classroom resources

Despite being spatially separated on the continent of Australia, both private and state aided schools in the urban and rural areas were more than adequately resourced for learning to take place. Schools found in the deep interland of Australia had all the necessary support infrastructure and compared favourably with schools in the metropolitan areas of Australia. An outstanding feature in the Victorian Department of Education is that almost every teacher in the state is provided with a laptop computer to assist him/her with assessment procedures and the implementation of profiling. Learner and teacher support materials were more than adequately supplied.

ii. Use of group work

In Australian schools visited the researcher found that three types of grouping were prevalent namely: mixed social grouping, ability grouping and no grouping at all. For a definition of the various types of groupings see (cf. 2.5.3.2). Group teaching choices were based on learner ability (maths and reading) age, social maturity and languages spoken. Ability grouping is being employed as it allows for better classroom control and management as well a result of varying aptitudes and age groups present in the classes. In the researchers opinion teachers have employed ability grouping because of their comfortability with traditional teaching methods and their lack of versatility with OBE grouping. Mixed social grouping is employed on the basis of varying age groups and social maturity. With regards to mixed social grouping it is the researcher's opinion that there appeared to be no co-operative learning and interaction taking place within the group. Thus it would appear that learners were merely placed and that traditional teaching was being practiced.

iii. Instruction

Instruction provided to learners depended on teachers understanding of OBE. Hence a description of teachers understanding of OBE is provided below in terms of the states and territory visited in Australia.
Teachers’ understanding of OBE

During interviews in the Australian schools visited, teachers never spoke in terms of OBE but always in terms of profiling. This was the term that they were most familiar with. Absolutely no reference was made to Spady and any related concept. In the many schools visited teachers asked me “What does OBE mean? ... We are not implementing OBE... we are implementing profiling... Is it the same as OBE?” Teachers understanding of OBE was limited to profiling, inputs and outcomes. No other terminology was used. In discussions with many teachers held it appeared that they were still very confused and grappling with profiling. At the time of my visit to the schools, teachers were in their second year of implementation and thus appeared very anxious and nervous about speaking about profiling.

iv. Assessment

OBE argues for the assessment of many dimensions (cf. 2.5.2.1) when assessing criteria used to assess competence, assessment techniques employed by teachers and the basis for promotion. A learner’s level of attainment can be best estimated from holistic ratings, analytical ratings, outcomes achieved and scored responses (van Rensburg, 1998: 93). While the majority of teachers in the schools visited assessed competence of learners on the basis of social maturity and social skills, the ability to communicate, read and write and cope with oral and written work one teacher assessed competence on age, working co-operatively and attaining an understanding of the culture of schooling. It should be noted that only one teacher in Australia measured competence against outcomes in the different stages. Assessment techniques employed by teachers for promotion varied from observation, to formal and informal tests. According to the teachers in the classrooms observed there is no basis for promotion in Australian schools. Learners merely proceed to the next year and are only kept back if they cannot cope as a result of social immaturity for which extensive reports and case studies have to be conducted to show the legitimacy of such a decision.

From the above it can be gleaned that teachers prefer to use traditional, convenient and familiar methods to assess competence. It would also appear that criteria used to assess competence are vague with no specific criteria although benchmarks exist in Australia. Furthermore, many teachers employ written formal and informal tests to assess competence with coincides with traditional methods of assessment. It would then appear that the promotion standards are contradictory. While it is asserted that learners must demonstrate competency, they are
promoted anyway. Lastly, teachers are of the opinion that they have no say in the promotion of learners. Promotion rests entirely with management. According to one teacher, while state based outcomes are advocated to assess competence, not much use of it is made in many schools. Interestingly, a comment made by one of the teachers, is revealing: “This new method, whatever you call it, allows for all learners to progress to the next year irrespective of their incompetence... I am not interested in this type of system... I will rather retire... in all my years of teaching I have not witnessed such confusion and uncertainty... this government is really going to produce an illiterate nation”. It is thus safe to say that there are no standards regarding promotion.

v. Critical incidents

A critical incident may be defined as an incident that stands out by contradicting or exemplifying a recognised principle of OBE. The researcher attempted through the use of the questionnaire to identify one critical incident in the classroom that either exemplified or contradicted OBE principles. This was written on the interview schedule under Section F by the researcher. Many of the critical incidents observed were similar in nature. Thus they will be discussed holistically and not according to each class observed.

a. Exemplifications of OBE principles

i. Catering for the needs of all learners

A distinct feature in Australian schools visited is the supply of human resources and physical resources available to learners to not only enhance their learning experiences but also cater for their disabilities, varying aptitudes, socio-cultural backgrounds and individual attention. OBE was exemplified by the following examples in certain classes:

- A deaf child in a public school in a mainstream class was catered for by a professional aid, referred to as a ‘easy listener’ who was attached to the teacher and learner to assist the learner in listening and hearing so that she could participate in and contribute to all the lessons being taught.
- During observation of literacy lessons in a number of classes where learners home languages differ to the medium of instruction in Australian schools (English)
Learners are removed from the class and instructed in their mother-tongue by the various teachers concerned until they can communicate and participate in English.

- Learners of varying aptitudes, social maturity and age were catered for by means of the assistance of teacher aides present in the class to assist both the teacher and individual learners to cope with their differing paces of development each being allowed to progress at his or her rate.

From the above it can be deduced that OBE was exemplified since the premise “all students can learn and succeed but not at the same rate” (cf. 1.1) was adhered to as well as differences in student learning rates (cf. 2.3.5.1) showing specific incidents where the needs of individual learners were catered for.

ii. Administering groupwork

The researcher only observed one class where groupwork was properly administered thereby exemplifying the principles of OBE. The lesson observed was activity based, involving co-operative learning (cf. 2.5.3.2) with each member of the group coaxed into excercising a responsibility towards his peers. The learners appeared confident with the exercise of teamwork displaying unity and assistance in problem solving while the teacher appeared comfortable in facilitating the group but more so individuals within the group, since the class only comprised of 12 learners. What was most surprising was the enjoyment and excitement in which learners carried out their tasks. The lesson was well prepared, devoid of ambiguous instructions, thus preventing confusion and disciplinary problems (cf. 2.5.3.2).

From the above it would appear that group work and co-operative team work can be successful if properly administered.

b. Contradictions of OBE principles

i. Ignoring the learners limitations

It should be noted at the onset that the class observed comprised of level 7 learners (grade 7 in South Africa) who were being taught English as a second language at level 1 (grade 1). The lesson taught incorporated formal language, for example diphthongs, consonants etc. which seemingly exceeded the language proficiency of the learners. During the lesson learners
appeared disinterested and lost, even though there where teacher aides present to assist them with the completion of the written task. Furthermore learners appeared disillusioned and embarrassed at their failure to answer questions and their inability to complete the written tasks. Lastly, learners were labelled negatively as a result of their inability to answer questions. Thus it would appear that the principles of OBE was contradicted as the teacher concerned did not cater for the varying degree of the learners in this lesson and also labelled learners negatively thus impeding their self concepts and ability to succeed (cf 2.3.5.1).

ii. Overlooking the varying aptitudes of learners

A common problem observed in a number of classes was the teacher’s inability to accommodate the varying abilities and aptitudes of the learners in the class. This was evidenced through the teachers teaching the entire class with no regard for the differences in age groups, social maturity and language proficiencies. This appeared to conform to the traditional method of teaching and contradicted OBE as learners are supposed to be grouped according to their ages (cf. 2.4.1) working at different levels. Teachers merely transmitted the knowledge expecting responses when tasks were administered. No group work was employed at all as teachers assumed that the entire group was comfortable at the level of instruction. Some learners merely sat passively showing boredom, while others became fidgety and inattentive and disruptive.

iii. Ability grouping

In one specific instance learners were grouped according to their various abilities. However, when it came to the actual teaching, no differentiation, guidance and attention was given to the various learners. Learners were left to their own devices with discipline problems emanating, learners unable to administer tasks competently as a result of the teacher’s inability to conduct group work effectively. The teacher acknowledged that she is steeped in traditional teaching and is unable to control a large group of 30 learners even though parent aides where present to assist in the group work. Thus the principles of OBE were contradicted in that not only was group work not properly administered (cf 2.3.5.2) but learners were neglected in terms of their varying needs and abilities.
### 5.3.3.2 Classrooms in Kwa-Zulu Natal, South Africa

#### i. Classroom resources

There appeared to be not only a lack and shortage of classroom resources in the schools visited but also inappropriate learner support materials for the learners. Schools 1, 2 and 4 complained that they had received very little, if any, support materials from the department. Comments made by the teachers indicate that the LSMs were above the levels of the learners. Three Grade 1 teachers asked: “How are children who just enter school be expected to read instructions and complete activities?” The LSMs for Grade 1 according to the teachers were stored away, and were not considered user-friendly. Particular reference was made to the Policy Document published for the Foundation Phase. Schools 1 and 4 had stationery shortages. According to the teachers and principals of both these schools, the onus rests with parents to provide books and pencils because the school cannot afford to supply the demand. However, many parents simply do not respond to the stationery requirements of the school because they cannot afford them. Thus pupils write on scrap pieces of paper with very little frame of reference to prior written work. Schools 2 and 3 felt that the LSMs were of no consequence to them as they were using their own traditional worksheets and activities.

#### ii. Use of group work

The majority of teachers employed ability grouping for the teaching of Reading and Mathematics, as they believed it was essential for monitoring the progress of learners and determining the pace at which they worked. Learners were randomly grouped into mixed social groups with no specific criteria in mind. Many teachers also claimed that mixed social grouping encouraged the slow and lazy learners to “feed off the brighter kids, while the brighter kids’ progress was hampered as they were always tied down by the slow learners’. It was also felt that that mixed social grouping discriminated against the slow and bright learners.

According to one teacher “…the slow learners feel out of their depth worrying about the bright learners who appear to be completing their tasks so quickly, while they have barely begun…this demotivates the slow learners even more”. The bright learners, in contrast become bored and begin labelling the slow learners negatively because of their frustration or having to wait for them. There were one or two teachers who stated that mixed social grouping helped: “the children learn better from the other kids…they are less intimidated when they are offered
assistance by their peers”. Mixed social grouping was used in the teaching of health lessons, environment studies and any other lessons where testing was not required. One teacher who tried mixed social grouping stated: “It is sad to note that since I have employed mixed grouping the slow learners are just left behind and I have no time to attend to them since so much is expected of us as teachers...if it is not activity work which takes the whole day it is assessment and record keeping”.

Of the four schools visited, only two employed ability and mixed social grouping. Schools 1 and 4 did not apply any form of grouping in the classroom because of the large number of learners present in the group. It can be deduced that large numbers pose a problem to group and activity work in the Foundation Phase. According to teachers, any form of group work in the classroom is also hampered as a result of the shortage of space. In the researchers opinion teachers in South Africa like Australia have employed ability grouping because of their comfortability with traditional teaching methods and their lack of versatility with OBE grouping (cf. 2.5.3.2). With regards to mixed social grouping it is the researchers opinion that there appeared to be very little co-operative learning and interaction taking place within the group. Learners were merely placed in these groups for convenience. Thus it would appear that the call for mixed social grouping in C2005 is not really heeded.

iii. Instruction

Teachers Understanding of C2005/OBE

- It became clear that conceptualisations of C2005 and OBE varied in a number of ways: The teachers interviewed voiced considerable differences in their understanding of C2005 and OBE within schools and from school to school. The majority viewed C2005 and OBE as one and the same. Teachers defined OBE principles as synonymous with mixed social grouping, integrated teaching, activity-based learning and a learner-centred approach. Since OBE meant different things to teachers in these schools, the researcher found a lack of coherence of what constituted OBE practice and progression from grade to grade. In many of the schools visited there appeared to be poor communication amongst the teachers regarding the preparation of phase organisers, for example, each teacher was concerned merely with her immediate class. No mention was made of the underlying principles or theoretical background of OBE at all. According to Jansen (1999) & Chisholm (2000), the distended variations of OBE
voiced by teachers is indicative of the wide range of terms used in the official documents.

- All the teachers interviewed appeared insecure and unsure of their teaching practice irrespective of their years of teaching and the resources available to them. Teachers were not clear about what actually constituted OBE practice. Confusion about the teaching of phonics, reading, spelling and the drill method were constantly addressed to me as both facilitator and researcher. Once again it was observed that Foundation Phase teachers within schools were acting on their own interpretations of practice.

- A sore training point articulated amongst many of the teachers interviewed was the duration of the workshops held. Teachers felt that the workshops were too short, with inadequate time for the amount of information requiring assimilation. There was much disillusionment and frustration as a consequence. Some disparity in preparation required for the workshops was noted. The white and Indian teachers felt that they needed a more intensive programme focusing on their needs, while black teachers felt that they needed basic training on the revised maths and theme teaching before even attempting to grapple with the concepts of OBE. Record keeping was also a concern amongst the black teachers.

iv. Assessment

The polemic surrounding assessment strategies and promotion in the Foundation Phase is evident below. In the schools visited, assessment done by teachers was conducted on a weekly, fortnightly and continuous basis. Teachers claim to assess learners in groups and individually. It is interesting to note that the criteria for assessing competence in learners varied from teacher to teacher within a school and from school to school. The majority of teachers assessed competence of learners on legible writing, oral communication, responses to oral and written instructions, interaction with peers, ability to read and write and understanding, managing and successful completion of activities. **Not a single teacher in South Africa measured competence against the specific outcomes prescribed in C2005.** Assessment techniques employed by teachers for promotion to the next grade included observation, formal and informal testing. Teachers stated that learners were promoted on the ability to communicate, comparison of peers in class and perceived expectations of the next grade, ability to cope with
numeracy as learners can always catch up with reading at some stage or the other and the ability to complete addition and subtraction sums up to 10.

From the above it is evident, as in Australia, that teachers prefer to use traditional, convenient and familiar methods to assess competence which are vague and appear to lack substance demonstrating a very narrow view of assessment. It is also clear to the researcher that the criteria used for assessment and the requirements for promotion contradict one another in many ways. While the administering of promotions is conducted through the use of observations and tests it is futile since learners as in Australia, are rarely kept back unless they exhibit serious learning and social problems for which extensive reports and case studies have to be conducted to show the legitimacy of such a decision. According to the teachers, promotion rests entirely with management.

v. Critical incidents

The term critical incident was discussed in (cf. 5.3.3.1, v). Many of the critical incidents observed were similar in nature, thus they will be discussed holistically and not according to each class observed.

a. Exemplifications of OBE principles

i. Integration of learning areas

An outstanding feature in one of the schools visited was the application of prior learning (cf 2.5.1.1) and integration of the various learning areas present in C2005 (cf 4.6.3.2). Two specific incidents will be discussed here. Firstly a lesson on dinosaurs was observed where discussions centred on the different types of dinosaurs, descriptions of the dinosaurs etc. The outcome of this lesson was learners writing a poem on dinosaurs in groups. While facilitating this lesson the teachers incorporated vocabulary extension and spelling, counting, group work with each member of the group sharing a certain amount of responsibility. Co-operative group work (cf. 2.5.3.2) was evident with the teacher assisting and guiding learners where needed. At the end of the lesson groups not only compiled the poems but also drew pictures relating to the poem. The second lesson observed was a discussion on the ‘Bill of Rights’. Initially a discussion was held on the meaning of ‘rights’. Thereafter the teacher presented each group with a topic to discuss and each group member was assigned a task of either being the scroll,
checking spelling, presenting the topic etc. Effective groupwork and co-operative learning was most evident in this lesson. The teacher not only managed to elicit responses relating to the various topics but also incorporated grammar in her lessons, writing, reading etc. Thus it is the researcher’s opinion that OBE was exemplified since a variety of learning areas were incorporated showing integration and understanding, as well as the teacher’s reference to prior learning, which enhanced the learning experience of the learners.

b. Contradictions of OBE principles

i. Grouping

A distinct feature in many of the classes visited was the teacher’s inability to conduct group work effectively. While teachers claimed to be employing ability grouping and mixed social grouping, this was not fully evidenced by the researcher. Examples of this were:

- Learners were placed in rows according to abilities and given verbal or written instructions and tasks from the teacher. No groupwork or teamwork was evidenced. The teachers concerned offered no guidance or support to learners. Learners only received some sort of acknowledgement when their work was being marked.

- In another instance while the teacher employed ability grouping she ignored the slow learners and left them to their own devices. Learners were also labelled negatively because of their inability to cope. It was also observed that the teacher dominated the entire lesson acting as a mere transmitter of knowledge with little feedback from the learners.

- In one particular school the class sizes were so huge (60 learners per class) that group sizes comprised 15 learners per group. Effective group teaching was impossible conduct as the learners were far too many per group and discipline problems, inattentiveness and insecurity (cf. 2.5.3.2) emanated as a result of the large numbers and the teacher’s inability to cope with the number of learners.

ii. Rote learning

In two schools visited rote learning was the order of the day. All learning was conducted through learners merely repeating the teacher’s statements. In fact learners merely chorused the teacher’s phrases with little or no understanding of what was being said. For example, in
numeracy learners had to chorus timetables, addition and subtraction sums. In literacy, learners had to regurgitate phonic sounds and sight words with no opportunity for the learners to demonstrate understanding, recognition and recall. Thus it would appear that the principles of OBE was contradicted since there was no active participation of learners and demonstration of understanding (cf 2.3.5.1) or performance for that matter.

5.3.4 Interviews

Informal interviews were conducted with teachers in Australia and South Africa at the end of the observation period to determine the following:

- Their successes and achievements in the implementation of OBE
- Difficulties experienced in the implementation of OBE and
- Advise to the Department of Education regarding the future implementation of OBE.

5.3.4.1 Teachers in Australia

Teachers in Australia do not view the concept of OBE very positively. Only two teachers interviewed showed a positive response. Both the teachers claimed that their teaching had become much more focused and that they were now more sensitive to the needs of individual learners. Many claim not to have experienced much if not any success with OBE. Many teachers in private school are of the opinion that since the implementation of profiling is not mandatory there is no need to implement it. A large majority of teachers claimed that they have not experienced success with this method. They are of the opinion that there is far too much emphasis and focus on assessment and reporting at the expense of teaching. Furthermore the terminology related to profiling is difficult, abstract and confusing. Comments by teachers are as follows:

This approach is just not on. It is far too confusing and makes too many demands on my time. The outcomes are ambiguous and not clear at all (3.10.1.1, 3.10.2.3)

It appears to me that it doesn’t matter so much whether I teach as long as I can show evidence of good reporting and assessment skills I will be classified as a competent teacher. This approach is a farce.
A grave problem experienced by many teachers is the mapping of learner’s progress. A comment made by Alister:

If I had to map the progress of each and every child in my class I would never be able to teach. I am not an administrator, I am a teacher...if I wanted to be an administrator I would have chosen a different field of study.

Likewise, Carol is of the opinion that it is impossible to teach and map students progress simultaneously. Carol adds:

I am just not able to cope. I have to teach, mark, watch the learners, supervise them, deal with behavioural problems and map a student’s progress. It is impossible. I also have a family to see to...the workload is just too much, even though the recording is done on the computer, it still requires time (3.10.1.1, 3.10.2.3)

Other difficulties experienced by teachers were the amount of training received towards the implementation of OBE. Teachers complained that the training received was far too little. Comments made teachers who had to go back to their schools and cascade profiling were extremely negative. “I was totally confused, afraid and embarrassed”.

I didn’t have the foggiest notion of what was going on in the training session. Mind you, I had only received three to four hours of training. After the training I took leave for a couple of weeks so that I didn’t have to face the teachers.

Ann, a senior teacher and vice-principal felt exactly the same way. She added:

I was just presented with a whole lot of material and endless rambling on about the theoretical aspects of profiling. I was totally confused. Well we are not implementing it our school, as I do not understand it. In any event each political victory in Australia heralds a change of focus in education. We just hope that profiling is not here to stay and that the next government will be more sensible.

Advice offered to the Department of Education by teachers interviewed was as follows:

201
Reduce the class sizes from 30 to 20 learners. Employ administrative staff in schools to assist in reporting and assessing. Go back to traditional teaching.

From the above it would appear that implementation of profiling in Australia is not without problems. Problems centre on insufficient workshops provided, difficult terminology, extra workloads and problems with assessment in reporting. The next section deals with interviews conducted with teachers in South Africa.

5.3.4.2 Teachers in Kwa-Zulu Natal, South Africa

In interviews conducted with teacher the implementation of OBE was viewed positively and negatively with the majority of teacher’s attitudes leaning to negative ones. Achievements experienced by teachers in the implementation of OBE was as follows:

With the focus of active involvement of all learners in my class I know and then elicit positive responses out of them.

Lynette and Renelle add to the above by stating “I have definitely become more focused in my teaching and more sensitive to the needs of my learners”.

I now know how to work with mixed social grouping, cope with large class sizes and change the foci from self to learners.

The researcher did not evidence any of the successes from the comments made by the teacher above. Her statements are totally contradictory in relation to the lessons observed.

The majority of teachers claimed not to have experienced any success with the implementation of OBE as a result of the limited exposure to OBE via the workshops, a lack of support systems (cf 4.8.2) to help them in the implementation process, insufficient resources, poor infrastructure (cf 4.8.2) and difficulties experienced with the implementation of OBE. Difficulties experienced by teachers varied depending on infrastructure of the school, socio-economic status of the learners, parent involvement and the locality of the school. Responses of the interviewees were as follows:
I have not experienced any success with OBE as a result of the obstacles and difficulties encountered in trying to implement OBE thus far. There has been a lack of resources (cf 4.8.2.5), a lack of parent involvement and a shortage of desks and chairs and working space for the learners. Furthermore, the workshops were impractical and that more practical workshops on OBE are required by the Department of Education and visits to schools by subject advisors are needed (cf 4.8.2.4)

Niri claims that difficulties and obstacles encountered by her are: a lack of cooperation from learners in bringing the resources necessary for the lessons at hand, large class numbers, time constraints (cf 4.8.2) and a lack of parent involvement. I advise the Department of Education to have workshops for parents on OBE and go back to the Drill Method of teaching.

Marcelle, Debbie and Saras claim that their exposure to OBE is very limited as they have attended only two workshops (cf 4.8.2.4). They state that they are comfortable with traditional teaching methods. Difficulties and obstacles encountered by them are a lack of resources (cf 4.8.2.5) and a lack of involvement from the learners. Lastly, the teachers advice to the Department of Education is to limit the implementation of OBE to secondary schools where pupils are less dependent on their parents for assisting them in tasks and projects and they implore the Department to hold more workshops on OBE.

I cannot come to grips with the terminology, eight learning areas (cf 4.8.2.2) and the expectation to assess and report (cf 4.8.2.3) on 57 learners on a continuous basis. There is just far too much to comprehend in OBE. I advise the Department to scrap the terminology, reduce class sizes and go back to traditional teaching.

I do not know how to really carry out assessment (4.8.2.3), comprehend the terminology and then use it appropriately in the lesson preparation (cf 4.8.2.2). I would advise the Department to simplify the terminology, concentrate on the three Basic R’s, make the workshops more practical and network the workshops.

Problems experienced by teachers in South Africa centre on large class sizes, a lack of resources, insufficient workshops and support systems and the structure of the curriculum.
5.4 CONCLUSION

This chapter has outlined the research design of this study in terms of its methodological and theoretical position. The programme of the research has been documented as thoroughly as possible. Distinct patterns emerge in the implementation of OBE (profiling) in Australia with regards to public schools and private schools. It would appear that since the Department of Education does not have a say in the educational policy of private schools, private schools do not feel obliged to be in vogue with educational changes surrounding them and are not afraid. In many of the public schools visited teachers do not appear to be really implementing profiling as they are not comfortable with the approach and would rather stick to traditional teaching. Teachers interviewed in Australia are of the opinion that the Department of Education has provided insufficient workshops for them to implement this new policy called profiling. Teachers in public schools are afraid and sceptical surrounding the change that is expected of them. Implementation strategies in Australian schools on assessment, group teaching and criteria used to assess competence differed not only from school to school but within schools. An outstanding feature in Australian schools is the small class sizes coupled with assistance provided to teachers by means of teacher aides. An abundant supply of resources as well as technology was also noted in almost every classroom in Australia be it urban or rural. The mindset of teachers in Australia is very similar to that of teachers in South Africa. The attitudes of teachers in private schools as opposed to teachers in public schools are similar to that in Australia. However problems experienced by teachers in South Africa regarding implementation are compounded by large class sizes and a lack of resources. Notable differences between teachers in Australia and South Africa surround teacher characteristics profiles, which will be discussed in the next chapter.
CHAPTER SIX

SYNTHESIS OF FINDINGS, GUIDELINES FOR EDUCATIONAL PROVISION AND CONCLUSIONS

6.1 INTRODUCTION

This study has dealt with a comparative analysis of OBE in the education systems of Australia and South Africa with a view to developing guidelines for education and future research. Such guidelines which have suggested themselves on the basis of this exploratory study, are aimed at improving future educational practice.

6.1.1 Overview of the investigation

In this section an overview of the study is presented in the light of the research problem set forth in 1.2. The researcher set out to investigate the following (cf 1.3):

- The factors which have contributed to the development of an outcomes based education approach to education, explaining key terminology and models of outcomes based education and expounded the components of an outcomes based approach to teaching and learning. This provided a conceptual framework within which to work (chapter 2).
- The study aimed at describing the shift towards an outcomes based approach to teaching and learning in the education systems of South Africa and Australia. Attention was given to the structure of the education system and the particular factors leading to the development of an OBE approach in those countries respectively and the extent to which OBE has been introduced in schools in those countries (chapters 3 and 4).
- The implementation was explored by means of a qualitative investigation of classroom practice in a small sample of South African and Australian schools using multiple methods of data gathering (chapter 5).

All the above aims were fulfilled which will be discussed in the next section.
6.2 SYNTHESIS OF SIGNIFICANT FINDINGS

The significant areas uncovered by the qualitative investigation are here synthesised and brought into relation to prior research and theory, especially as reviewed in the literature study presented in Chapters 2, 3 and 4 and in the discussions in 5.3.3.1 and 5.3.3.2. The following approach is followed: the synthesised findings are not arrived at from a mere summary of the themes as discussed in 5.3.3.1 and 5.3.3.2. By the scrutinising of the themes for salient and frequently occurring aspects, certain rubrics emerge.

The findings are based on an indepth conceptual analysis of key terminology related to OBE, an indepth literature study of systems of education namely: Australia and South Africa, completed and enhanced by a qualitative study of a small sample in each country. Each of these will now be discussed.

6.2.1 A conceptual analysis of key terminology

The terms ‘performance’, ‘competence’ and ‘competency’ were explored and analysed in detail. ‘Performance’ was described by Doll as mechanical, carrying no value judgements (2.3.1) while the HSRC viewed performance as an integration of knowledge + skills + values + attitudes which are essential in determining performance (2.3.1). The term ‘competence’ was analysed by a number of views such as:

- Integrated application of capabilities within specific contexts (HSRC - 2.3.2.4).
- Competence equates performance and is not directly observable/measurable (Wolf – 2.3.2.1).
- Performable roles are dependent on standards of competence and meaning attributed to competence (Mansfield – 2.3.2.1).
- Performance, i.e. what a person does, is influenced by many factors including attention, memory, non-linguistic knowledge and knowledge – largely unconscious of grammar. The latter is referred to as competence (Chomsky – 2.3.2.2).
- Learning is framed in structural terms and comprises ‘structures of the whole’ namely the sensory motor, pre-operational, concrete operational and formal operational stages.
One may equate the ‘structures of the whole’ to a definition of competence as the abilities underlying and partially controlling performance (Piaget – 2.3.2.2).

- It is not differences in competence which condition linguistic and intelligence differences but rather the social context. Therefore groups diagnosed as culturally deprived may have the same competence as those in the mainstream culture. Competence is internally and externally driven and importantly this means one cannot rely entirely on the social context to assess competence and differences in competence (Bruner – 2.3.2.2).

- Competence is viewed as a given task, goal or skill which has to be learned and evidence of which can be verified (Fagan – 2.3.2.3).

- Competence is presented in terms of potential, ability and aptitude (Noddings – 2.3.2.3).

- Capacity to perform generally and not specifically in a specific realm (Short – 2.3.2.3).

Lastly, the term ‘competency’ was described by Short (2.3.3) as perceptions that are subjective and restricted depending on the perspective of the assessor while Pearson (2.3.3) adds that competency implies mastery of basic knowledge.

From the above definitions of ‘performance’, ‘competence’ and ‘competency’ there appears to be no consensus on the meaning attributed to each concept. This poses serious problems for South African education (2.3.2.5).

### 6.2.2 Common problems experienced in Australia and South Africa

Problems experienced by teachers in Australia and South Africa centred on the structure of OBE, training received, reporting and assessment and the extra workload. In the Northern Territory (3.10.1.1), New South Wales (3.10.2.3) and Victoria (3.10.3.1) similar complaints were echoed on the profiling concepts and language being convoluted, complex and too difficult to read and understand. The terminology was described as user-unfriendly (3.10.2.3). Teachers felt that there were far too many outcomes which were perceived and interpreted differently by different teachers as they appeared to be ambiguous and lack clarity. The majority of teachers viewed reporting and assessment negatively as it was viewed as a large amount of time being taken up instead of teaching (3.10.2.3). The extra workload associated with the profiling of students’ progress was seen as an imposition, with shocking demands...
made on the time of teachers. In South Africa the very same issues were raised. Teachers complained about the language of OBE being too complex, and the terminology being extremely confusing. The curriculum was also seen as being overcrowded with eight learning areas and 66 specific outcomes which were unclear and provided no guidance on progression from year to year (4.8.2.2). Teachers experience grave problems with assessment and reporting since they have to administer it with no proper guidelines and policy on assessment (4.8.2.3). Furthermore, teachers felt disillusioned at not only having to reorganise the curriculum with no assistance but also have to reorganise it to suit assessment and reporting which took up considerable time and increased the workload considerably (4.8.2.3). This suggests that there are problems inherent in the system of OBE.

6.2.3 Problems specific to South Africa

Firstly many South African schools have a large number of learners in their classes which makes it almost impossible to implement OBE (5.3.1.2). Secondly, South African schools are faced with the problem of inadequate resources and poor infrastructure (4.8.2) which makes it impossible to not only implement OBE but to provide suitable education. In the outlying and rural area schools do not have access to the basic commodities such as electricity and water and conventional toilets are missing (4.8.2, 5.3.1.2). Added to this is insufficient classroom space for learners, insufficient chairs and desks for learners to work on and a lack of the basic necessities: exercise books, pens, pencils and textbooks (4.8.2). Thirdly, learner support materials issued by the Department of education have had little relevance for schools and teachers as it appeared above the level of the majority of learners. In many instances teachers were expected to develop their own materials and resources which they were not skilled to do (4.8.2.5). This could be attributed to the large class sizes, lack of equipment and the disparity in teacher training. Fourthly, the time-frames for the implementation of OBE was not feasible (4.8.3) and presented major problems from the onset as a result of financial, physical and human shortfalls (4.7.1). Pilot programmes for grades 1-3 and 7-9 were aimed at during the second half of 1997 as preparation for full-scale implementation which was to start in 1998 (4.7.1). The INSET programme was aimed at reaching all 300,000 teachers in the system. However, this was not achieved and implementation plans were scaled down to Grade one in 1998. Thus the implementation of the other grades were postponed.
6.2.4 Advantages in the Australian education infrastructure

The Australian education system will be examined from a macro and micro perspective. On a macro view Australia is a 1st world – developed country (1.1.2) characterised as a stable political, social and educational country which is well resourced with approximately ten years of experience in the implementation process of OBE (3.9.1). The implementation of OBE has been carefully planned in Australia with numerous reviews having been conducted during the pilot studies (3.10.1.1, 3.10.2.3, 3.10.3.1) before the actual implementation of OBE. **While the preparation towards the implementation officially commenced in 1988 (3.9.1) it should be noted that the formal implementation of OBE only commenced in 1998 with only one learning area being implemented a year (3.10.1.1).** Therefore it would be safe to say that the implementation of OBE in Australia was considered with great care and planning before implementation. It is also evident that even though so much planning and preparation was put into the implementation process teachers still felt that they had received insufficient training (3.10.1.1, 3.10.2.3, 3.10.3.1).

On a micro level Australian schools are far better resourced than South African schools. The researcher not only in the schools observed, but also in other schools, evidenced the basic necessities such as water, electricity and conventional toilet facilities as well. The schools visited were more than adequately supplied with human and physical resources (5.3.1.1, 5.4). In the classrooms observed class sizes ranged from 12 – 31 learners per class (5.3.1.1) with sufficient space for learners to work in. **It was interesting to note that in every classroom visited in Australia a computer was present for the use of the learners and every teacher in Victoria is provided with a laptop computer to carry out assessment and administrative work (5.3.3.1).** Schools in both urban and rural areas are provided with the necessary support infrastructure from the Department whenever it is required.

Thus, from a macro and micro level Australia is well equipped to cater for the needs of the learners.

6.2.5 Differences in the teacher characteristics profile in Australia and South Africa

An outstanding feature in the research undertaken was the ‘Teacher Characteristics Profile’. Out of the 11 classes visited in Australia 8 teachers were qualified with degrees while the
remaining 3 had a teaching diploma. Also of the 8 teachers present with degrees 6 of them had post-graduate degrees. Of the 11 classrooms visited in South Africa only one teacher had a post-graduate degree while the rest of the teachers had teaching diplomas. Thus it is evident that teachers in Australia are better qualified than teachers in South Africa. Furthermore, an outstanding feature in Australian education is that incentives provided for teachers include:

- remuneration for all fees paid towards studying after successful completion of the course or degree;
- courses attended by teachers during the holiday for which payment is made can be claimed as a tax rebate (3.6.3.7)

6.2.6 Recommendations for future research

The researcher recommends the following:

- A large-scale investigation should be carried out on the present research to be able to make empirical generalisations.
- Further research is conducted in schools after the recommendations of the C2005 Review Committee have been put in place to then ascertain the viability of OBE in South Africa.

6.2.7 Educational guidelines

It is essential that the government in South Africa pay immediate attention to in-service programming and training in this country. A large discrepancy exists in the teacher training received through the various ex-Departments of Education prior to 1994. It is the researcher’s opinion that basic training should be given in all areas of teaching first, then training be given in OBE. Furthermore, incentives should be provided in South Africa like in Australia for teachers to improve their qualifications (3.6.3.7) and receive recognition and grading for their qualifications attained. Lastly, it is the researcher’s opinion that the government should introduce a point system whereby teachers are compelled to attend a certain number of refresher courses for the year, thus enabling them to keep up with the latest trends in education and to improve on their educational practice in the classroom. Attaining a certain amount of points could either upgrade or degrade them.
6.3 SUMMARY

South Africa is in the midst of dynamic political, social and educational change as a result of the past laws of this country which discriminated against people on the basis of colour in all spheres of life. However, the move towards change regarding education in this country has been hasty and not properly thought out and planned. South Africa must acknowledge that it is a developing country with many problems as described throughout this dissertation, and that it is essential to avoid indiscriminate cultural borrowing of policies which is not suitable to the South African climate. South Africa will have to carefully look at the contextual factors in this country and maybe gradually introduce change over a period of time so that the disadvantaged in this country are not further disadvantaged.
BIBLIOGRAPHY


Traditional Education (not dated). History of Outcome Based Education. Arizona.


APPENDIX

QUESTIONNAIRE PROFILE

A. SCHOOL PROFILE

The principal or his/her delegate will complete this instrument.

1. Name and position of the person completing this form
   1.1 Name ____________________________________________
   1.2 Position at school: __________________________________

2. Name of school: _______________________________________

3. Location of the school __________________________________
   3.1 State/Province: ____________________________________
   3.2 Circuit ___________________________________________
   3.3 Region ___________________________________________

4. Name of the ex-department of your school: ________________

5. Is this school classified as a [cross one of the following]?
   5.1 Primary school
   5.2 Combined

6. Which grades operate in your school? _______________________

7. Complete the following with regard to number of students in the school in 1999
   7.1 Number of Males
   7.2 Number of Females
   7.3 Total number of students
8. Home language of most students: ____________________________

9. Home language of other students: ____________________________

10. Language of instruction in the school: ____________________________

11. Please indicate if the school is a

<table>
<thead>
<tr>
<th>11.1 Single shift school</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>11.2 Double shift school</td>
<td></td>
</tr>
</tbody>
</table>

12. Rate the general condition of the school buildings by ticking ONE of the following?

| 12.1 the school needs complete rebuilding |             |
| 12.2 some classrooms need major repairs |             |
| 12.3 most or all classrooms need minor repairs |             |
| 12.4 some classrooms need minor repairs |             |
| 12.5 the school is in good condition |             |

13. Which of the following options most accurately depicts the general availability of learning materials in your school? “The percentage of students in your school who have all required learning materials in all the school subjects is” (Please tick)

| 13.1 About 80-100% of students |             |
| 13.2 About 60-79% of students |             |
| 13.3 About 40-59% of students |             |
| 13.4 About 20-39% of students |             |
| 13.5 About 0-10% of students |             |
14. Does your school have the following items? AND, if yes, what is the status or condition of each item?

<table>
<thead>
<tr>
<th>ITEM</th>
<th>YES</th>
<th>NO</th>
<th>GOOD</th>
<th>POOR</th>
</tr>
</thead>
<tbody>
<tr>
<td>14.1 telephone</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>14.2 fax machine</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>14.3 photocopier</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>14.4 store room</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>14.5 staff room</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>14.6 sports field</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>14.7 swimming pool</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>14.8 computers</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>14.9 e-mail facility</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>14.10 Internet</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
B: TEACHER CHARACTERISTICS PROFILE

This instrument will be completed once by the teacher for each selected classroom

1. Name of school: .................................................................

2. Sex:

<table>
<thead>
<tr>
<th>FEMALE</th>
<th>MALE</th>
</tr>
</thead>
</table>

3. Age: (Please tick)

<table>
<thead>
<tr>
<th>&lt;20 yrs</th>
<th>20-25 yrs</th>
<th>26-30 yrs</th>
<th>31-40 yrs</th>
<th>&gt;41 yrs</th>
</tr>
</thead>
</table>

4. Teaching experience:

<table>
<thead>
<tr>
<th>Number of years</th>
</tr>
</thead>
<tbody>
<tr>
<td>4.1 How many years altogether have you been a teacher</td>
</tr>
<tr>
<td>4.2 How many years have you been a teacher at this school</td>
</tr>
</tbody>
</table>

5. Please list your academic and professional qualifications:

<table>
<thead>
<tr>
<th>Qualifications</th>
<th>Year obtained</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
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<tr>
<td></td>
<td></td>
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<td></td>
<td></td>
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<tr>
<td></td>
<td></td>
</tr>
</tbody>
</table>

6. Please list all the OBE in-service training courses you have attended. In each case indicate how you rate the value of the in-service training.

<table>
<thead>
<tr>
<th>Focus of course</th>
<th>Who offered it</th>
<th>Duration</th>
<th>Value of training</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td></td>
<td>Useful</td>
</tr>
<tr>
<td>1.</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>2.</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>3.</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>4.</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>5.</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
C. CLASSROOM RESOURCE PROFILE

The researcher will complete this instrument at the beginning of each observation session.

1. Indicate how you would describe the classrooms being observed (Please tick)

<table>
<thead>
<tr>
<th></th>
<th>YES</th>
<th>NO</th>
<th>Qualitative Comment</th>
</tr>
</thead>
<tbody>
<tr>
<td>1.1</td>
<td></td>
<td></td>
<td>Pupils have adequate seating space/place</td>
</tr>
<tr>
<td>1.2</td>
<td></td>
<td></td>
<td>Adequate writing surface for pupils</td>
</tr>
<tr>
<td>1.3</td>
<td></td>
<td></td>
<td>Chair for teacher</td>
</tr>
<tr>
<td>1.4</td>
<td></td>
<td></td>
<td>Table for teacher</td>
</tr>
<tr>
<td>1.5</td>
<td></td>
<td></td>
<td>Adequate lighting</td>
</tr>
<tr>
<td>1.6</td>
<td></td>
<td></td>
<td>Adequate space for movement Between desks</td>
</tr>
<tr>
<td>1.7</td>
<td></td>
<td></td>
<td>Charts displayed in the class</td>
</tr>
<tr>
<td>1.8</td>
<td></td>
<td></td>
<td>Walls are painted and well maintained</td>
</tr>
<tr>
<td>1.9</td>
<td></td>
<td></td>
<td>Ventilation</td>
</tr>
<tr>
<td>1.10</td>
<td></td>
<td></td>
<td>Classroom is adequately roofed</td>
</tr>
<tr>
<td>1.11</td>
<td></td>
<td></td>
<td>Windows available and in a Reasonable state of affairs</td>
</tr>
<tr>
<td>1.12</td>
<td></td>
<td></td>
<td>Chalkboard available</td>
</tr>
</tbody>
</table>

2. General comments on classroom resources observation

........................................................................................................................................

........................................................................................................................................
D. GROUPING PROFILE

The researcher will complete this instrument during the observation session.

1. Indicate how you would describe the class grouping.

<table>
<thead>
<tr>
<th></th>
<th>Number</th>
<th>Yes</th>
<th>No</th>
<th>Qualitative Comment</th>
</tr>
</thead>
<tbody>
<tr>
<td>1.1 Ability grouping</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>1.2 Mixed social grouping</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>1.3 No grouping</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>1.4 Number of groups</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>1.4 Group size</td>
<td></td>
<td></td>
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</tbody>
</table>

2. General Comments

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..................................................................................................................................................
This instrument is to be completed by the researcher for each session on each of the visits (30 min – 1 hr sessions):

1. Number of learners in the class: ...........................................

2. How often do you do assessment in your class? ...........................

3. Do you assess pupils in:
   Groups: ...........................................................................
   Individually: ......................................................................

4. What criteria do you use to assess competence?
   .........................................................................................
   .........................................................................................
   .........................................................................................

5. On what basis is promotion done?
   1. formal tests
   2. informal tests
   3. observations

6. On what basis are pupils being promoted to the next grade?
   .........................................................................................
   .........................................................................................
   .........................................................................................

7. General comments:
   .........................................................................................
   .........................................................................................
F: CLASSROOM OBSERVATION SCHEDULE

This instrument is to be completed by the researcher for each session, on each of the days of the observation (30 min - 1hr sessions)

1. Phase Organiser: ............................................................

2. Programme Organiser: ....................................................

3. Learning Area: ..............................................................

4. What is the number of learners in the class? ......................

How often did you observe each of the following in a classroom session? Tick the relevant box.

<table>
<thead>
<tr>
<th></th>
<th>None</th>
<th>Little</th>
<th>Much</th>
</tr>
</thead>
<tbody>
<tr>
<td>1. Students organised in groups</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>2. Learning is activity-based</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>3. Teacher integrates themes from different learning areas</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>4. Teacher-led questions</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>5. Learner-initiated questions</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>6. Teacher provides learners with individual feedback</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>7. Learners given opportunities to demonstrate what they learn, eg, reading aloud</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

6. Describe fully one critical incident in the classroom (The critical incident should either exemplify or contradict OBE principles):

____________________________________________________________________
____________________________________________________________________
____________________________________________________________________
____________________________________________________________________
____________________________________________________________________
____________________________________________________________________
____________________________________________________________________
G: TEACHER INTERVIEW SCHEDULE

The researcher will complete this instrument at the end of the observation session.

1. You have now had the opportunity of implementing OBE. What would you regard as some of the main ACHIEVEMENTS AND SUCCESSES, which you experienced with this curriculum in your class?

2. What are the main DIFFICULTIES AND OBSTACLES, which you encountered this year as you tried to implement OBE?

3. Given your experiences with OBE this year, what would you advise the school or Department with regard to the future of the implementation of OBE? Please be specific?
This instrument is to be completed by the teacher.

1. How have your teaching strategies changed since the implementation of OBE?

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2. General comments on how your teaching has changed (or not) before the implementation of OBE compared to currently.

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