

**A qualitative study of the impact of organisational
development interventions on the implementation of
Outcomes Based Education.**

By

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DECLARATION

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I DECLARE THAT:

A qualitative study of the impact of organisational development interventions on the implementation of Outcomes Based Education is my own work and that all the sources that I have used or quoted have been indicated and acknowledged by means of complete references.

Signature

R S RAMROOP

Date

DEDICATION

TO PAUL

ACKNOWLEDGEMENTS

I WISH TO EXPRESS MY SINCERE APPRECIATION TO:

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ABSTRACT

Outcomes Based Education (OBE), has been, since its inception, fraught with problems. OBE in its very nature is complex. To fully embrace this method and ensure its success, schools must be able to make the necessary paradigm shift. This can only be achieved when schools receive relevant and empowering training, support and development. In other words, organisational development must be the key words. The aim of this study is to explore the impact of organisational development interventions on the implementation of OBE. The case study method was employed where it was realised that schools that received organisational development interventions, together with Outcomes Based Education, were able to implement this method with greater understanding, skill, and confidence.

The investigation recommends an organisational development design that could be used instead of the cascade model, and provides suggestions on what can be done to ensure a more successful implementation process.

KEY TERMS

Educational change

Change management

Sustainable development

Organisational development interventions

Outcomes Based Education

Outcomes Based Assessment

Curriculum 2005

Revised National Curriculum Statements

Cascade model

Expanded opportunities

ACRONYMS

OD:	Organisational Development interventions
OBE:	Outcomes Based Education
OBA:	Outcomes Based Assessment
NQF:	National Qualifications Framework
SAQA:	South African Qualifications Authority
SGB:	School Governing Body
RNCS:	Revised National Curriculum Statements
SMT:	School Management Team
DoE:	Department of Education
LRC:	Learner Representative Council
NGO:	Non-government Organisation

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CHAPTER ONE

OVERVIEW OF THE STUDY

1.1. INTRODUCTION

The launching of Outcomes Based Education (OBE) and Curriculum 2005 in 1997 was greeted with mixed feelings in the education sector - excitement, anger, trepidation, outrage and caution. While some people saw it as a definite move towards redress and equality in education, others saw it as a way to drop the existing 'standards' of education. But with pressure on the new government to address the plight of education, coupled with global politics and economics, Outcomes Based Education and Curriculum 2005 were to become the key strategies to educational change and reform in South Africa. It is believed that this new curriculum has great potential to achieve a society that meets the needs of the new millennium. Unfortunately, in South Africa, the implementation has been fraught with problems and negativity that have seriously hampered the realization of a new education system that could be based on equality and democracy.

The question then begs: Why is the implementation so fraught with problems? What is missing in this process that hampers the development of the schools? Could it be a case of the many gaps that exist between the policy makers and practitioners? What are the readiness and skills level of the educators on the ground to be able to implement the changes? De Clerq (1997:139) states that "although this approach has the potential to restructure and realign a poor and ineffective system, the way it is conceptualized and introduced may jeopardize its ability to address and redress the real problems and causes of the existing poor system." De Clerq (1997:140) also argues that the manner in which the

curriculum changes have been implemented will be counter-productive to the need for redress and actually benefit the privileged schools. Could it be true that this new way of teaching and learning only feeds and reinforces the divisions that have crippled and continue to cripple the development of a post-apartheid society?

It becomes imperative that questions are posed as to why there has been such dismal failure in the implementation of OBE at schools, what the contributing factors to this failure are, and what can be done to alleviate these problems, so that the transformation that South Africa seeks is fulfilled.

1.2. MOTIVATION FOR THE RESEARCH

In 1997, when OBE and Curriculum 2005 were officially launched, ‘quality in education’ were the key words that were placed firmly on the national agenda. However, these national level initiatives saw huge gaps between policy design, the national vision and the reality of the actual implementation and the delivery on the ground. The provinces were and still are expected to meet basic needs, bring in the changes and maintain fiscal discipline (amidst growing evidence of poor financial management in many provinces). No doubt this all led to a financial crisis experienced by many provinces, especially the ones beleaguered with the negativity that came with the Bantustan history. Amidst all the changes that were taking place both nationally and in the education system, the next drastic blow to the education sector was the implementation of the rationalization process and the redeployment of teachers. The teaching force was left to cope with the implementation of a new curriculum as well as the uncertainty, frustration and disillusionment of having to be ‘put on the list’ and not knowing what tomorrow will bring. This led to many good and experienced teachers leaving the teaching profession. Countries seeking experienced teachers to save their own country’s education crisis easily lured some of South Africa’s best teachers (Mkhize: 2004). The teaching force became more and more demoralised and yet within this atmosphere they were

expected to bring in the new system, be excited about OBE, and be enthusiastic about implementing it in class. According to Motala (1997:2), “the successful transformation of education depends on a committed cadre of dedicated teachers.” This therefore brings us back to the question of how much real transformation is taking place and just how much the system remains the same.

In delivering training and support on OBE and the changes in curriculum, it becomes increasingly clear that for the policy to work on the ground, there needs to be a greater awareness on the part of government and service providers of the educational context and the dynamics on the ground. In 1996, *The School Register of Needs Survey*, a major data gathering and information analysis project conducted by the Department of Education was compiled (Motala: 1997). This survey gives a very bleak picture of the historical and systematic patterns of neglect and deprivation in South African schools. It shows clearly that the vast majority of children in the South African education system experience conditions of extreme neglect. In 2000, another survey was conducted to update the 1996 statistics. Although a number of improvements were noted in the 2000 survey, a considerable backlog remains, especially in KwaZulu Natal, Eastern Cape and Limpopo. To illustrate:

Table 1. Illustration of results from School Register of Needs Survey

% of schools that have:	NATIONAL		LIMPOPO		KWAZULU NATAL		EASTERN CAPE	
	1996	2000	1996	2000	1996	2000	1996	2000
Media centres	17	20	5	7	18	20	7	10
Computers	9	12	3	5	7	10	4	5
Toilet facilities	88	91	91	93	90	94	75	81
Electricity	43	55	21	51	38	43	22	40
Water	65	71	34	63	65	68	57	59
Telephone	41	65	38	49	35	68	19	59

(Bot: 2001).

Further information worth mentioning includes:

- In the 1996 Survey:
 - 51% of schools in South Africa had no adequate textbooks;
 - 73% of schools in South Africa had no learning equipment (for example laboratory equipment); and
 - 69% of schools in South Africa had no learning materials.
- In the Limpopo Province, educators have to share classrooms, teach outside, utilize other facilities and teach in shifts. Yet, between 1996 and 2000, the number of schools in Limpopo increased by 104 from 4157 to 4261, a mere 3%.

It is important to note that the 1996 *School Register of Needs Survey* was conducted one year before the 'roll out' programme for the introduction of OBE. The implementation process continued even though the above survey revealed quite clearly that schools across the country were neither well equipped nor ready to implement curriculum changes of this magnitude.

It is therefore not surprising that the Ministerial Review Committee, that reviewed the implementation of Curriculum 2005 in 2000, revealed that although support for OBE was evident, the implementation was confounded, amongst others, by:

- inadequate orientation, training, and development of teachers;
- learning support materials that are variable in quality, often unavailable and not effectively used in classrooms; and
- shortage of resources and personnel to implement and support Curriculum 2005.

(DoE: 2005)

Furthermore, the majority of the schools in South Africa are characterized by an authoritarian paradigm that is contradictory to the essence of OBE. For the

schools to reap any success from the new curriculum, this paradigm needs to be addressed as a starting base for any further interventions. At present, the new system does not “have an appropriate understanding of the change process and is unable to develop strategies to influence the reform process and empower the disadvantaged to struggle for a fairer, more equitable and effective education and training system” (De Clerq 1997:143).

It is recognised that change is inevitable in this fast-paced world as schools, too, need to adapt to the changing requirements of the economy. It is also recognised that with change, no matter how big or small, comes both the potential for conflict, low morale, and other problems, and also opportunities for making things better. Therefore, with change, especially of the magnitude of OBE, further understanding and support is definitely needed for the people expected to implement the changes. Change impacts significantly on people and institutions and, if not administered correctly and sensitively, with a lot of skill and support, it can so easily see good ideas become unachievable. Furthermore, if the people who need to be the driving force behind the change are not equipped with the knowledge, skills, and attitude to empower them to be a positive force of change, then any change attempt is sure to fizzle out.

Darling-Hammond (1990:240) in *Instructional Policy into Practice*, elaborated on some important lessons about policy and implementation:

“First, policy must be better communicated if it is to be well understood. Meaningful discussion and extensive professional development at all levels of the system are critical components of such communication; directives are not enough.

Second, policies do not land in a vacuum; they land on top of other policies.

Third, teachers teach from what they know. If policy makers want to change teachers they should pay attention to teacher knowledge, they must look beyond curriculum policies to those policies that control

teacher education and certification, as well as ongoing professional development, supervision and evaluation.

Fourth, the process of change is slow and difficult. It requires perseverance and it requires investment in those things that allow teachers, as change-agents, to grapple with transformation of ideas and behaviour: time for learning about, looking at, discussing, struggling with, trying out, constructing and reconstructing new ways of thinking and teaching.”

In looking at the first lesson outlined above and applying it to the SA context, the question could be asked: Was the change to OBE as well as the rationale for it and Curriculum 2005, well communicated? According to Vally & Spreen (1998:14), most teachers across the country have consistently expressed views about the lack of information, resources or teaching materials for implementing the new curriculum. In fact, many schools had only one copy of the policy document if at all. The adoption of the cascade model for teacher training has resulted in teachers receiving one-day training courses from their districts. This has left many teachers confused and with a feeling that, with the circuit officials conducting the training, it is a case of the blind leading the blind. Furthermore, these teachers are then expected to return to school and train the rest of their staff. According to Vally & Spreen (1998:16), “the (arguably questionable) assumption that after a one-day workshop a teacher will understand enough about a new teaching approach to go back to his/her school and teach it to the colleagues is wrought with problems and contradicts most of the research on teacher professional development.”

It is therefore not surprising that many teachers and departmental officials display both active and passive resistance. This resistance is natural in a change process and unfortunately is not addressed at all in the training of OBE. Furthermore, most teachers receive their knowledge of OBE from the media

which gives its popular opinion, but is definitely not a sound and reliable source of information for teachers to use to transform the country's education system.

Darling Hammond's second lesson is also very important. Before a new process is implemented there should also be a process of unlearning and an understanding as to why there is a need for change. Often this is ignored and it is assumed that, as the new policy lands on top of the others, teachers must be able to take on these changes and easily incorporate them into their daily practice. From working with teachers and schools, one would realise that this is not such an easy task and this assumption and myth really needs to be addressed. In schools across the country, there have been very few interventions to address change management issues towards the purpose of making the change to OBE easier, more manageable and more acceptable. According to Vally & Spreen (1998:16), "those who have participated in training have been sceptical about their usefulness. Many have pointed to the fact that in order for change to take place there will need to be very real institutional changes."

The third lesson as stated by Darling-Hammond talks about the importance of teacher knowledge, and yet many teachers have been made to feel very disempowered during this change process. Furthermore, it is a well documented fact that a significant number of teachers in the South African system are under-qualified. Govender, Greenstein & Kgobe (1995) note that the overall rate of under-qualification is 36 %, with women (64 % of the total number of teachers) comprising 71 % of the under-qualified teachers. While nationally 40 % of women teachers are under-qualified, in the Northern Cape, Free State and Eastern Cape, this figure rises to 52 %. Many of these teachers struggle with the various requirements of teaching and the difficult circumstances in impoverished ex-homelands and rural areas. Yet they are also expected to embrace the curriculum changes and implement them. Once again

the question to ask is: Did the training in OBE take into account these inadequacies that exist and ensure that the training programmes are conducted with this crucial lesson in mind?

The fourth lesson is that change is slow and difficult, that time should be allowed for debate, and for teachers to develop ideas and understand the dynamics of the change. Did this happen at schools? Were teachers given the opportunity to discuss and understand themselves and all the demands of the new curriculum or were they pushed too fast into a transformation process they did not yet understand? Unfortunately, the adoption of the cascade model of training gave no time and space for meaningful discussions at all levels in the education hierarchy. Therefore, if one looks at just these four simple lessons outlined by Darling-Hammond that could ensure the successful implementation of the new curriculum, one would realise that in many ways and in many degrees the various South African Departments of Education failed the teachers and therefore sabotaged the potential success of the new system and curriculum.

No doubt, for the policies on OBE and curriculum changes to gain more 'material' rather than 'symbolic' status, the Departments of Education need to become more rigorous with their training strategies and should begin to focus on a more holistic development of the schools to bring about the desired changes and transformation of the South African education system. The shift in focus should rather be on creating enabling learning environments for all stakeholders in the process. The only way to create enabling environments is to ensure that organisational development is an integral part of any transformational programmes at the schools. The approach should ensure that all stakeholders, that is, School Management Teams (SMT), School Governing Bodies (SGB), Learner Representative Councils (LRC), and educators are equally involved in and accountable for the development of the school.

This dissertation therefore hopes to accentuate the importance of organisational development interventions for the holistic empowerment of schools as an integral element for the successful implementation of OBE.

1.3. PROBLEM STATEMENT

What organisational development interventions could be delivered at school level to enhance the quality of the implementation of OBE?

SUB-PROBLEMS:

- What is the rationale behind the adoption of OBE?
- What are the problems/obstacles experienced at schools with regards to the effective implementation of OBE?
- What significant differences in the quality of the implementation of OBE could be determined from schools that receive organisational development interventions and those that do not?

1.4. AIM OF THE STUDY

- To explore the policy characteristics, aims and objectives of OBE;
- To identify the problems and difficulties experienced in the implementation of the change to OBE;
- To explore the importance and characteristics of organisational development at schools;
- To compare the quality of implementation of OBE at schools that receive organisational development interventions with those that do not; and
- To compare the attitude and confidence of school staff who receive organisational development interventions with those who do not.

1.5. METHODOLOGY

A qualitative case study has been decided upon as the research approach. Various methods are used. This will be explained in greater detail in Chapter 3. The geographical focus of this study is on the rural Limpopo Province. In the case study, an in-depth analysis will be conducted in one rural school that has received assistance and support for one year (2001). The school has been experiencing various problems with staff issues, curriculum delivery, absenteeism (staff and learners), and poor academic (matric) results. This case study will therefore assess the impact of organisational development interventions on empowering teachers to implement OBE. This will be done through observation, interviews (focus group and individual) and document analysis. A comparison with another school will also be made. Furthermore, a comparison will be done with a cluster of rural schools that have been receiving organisational development interventions from a non-government organisation as well as specific training and support on OBE. Interviews with key staff members of the organisation, observation, and document analysis will be conducted.

1.6. PROGRAMME OF STUDY

In *Chapter Two*, a further explanation of organisational development and its impact on institutions and institutional development will be offered. Also, a brief account for the rationale of OBE and the changes to the new curriculum will be attempted. There will be a focus on the concept of change and how this can be introduced to individuals and institutions in an empowering manner. Here important guidelines for managing change will also be explored in some detail. Furthermore, an explanation of “What is OBE?” will be attempted and the importance of appropriate assessment of this new way of teaching and learning will be explained. There will be an outline of the implementation strategy of the DoE and therefore a critical analysis of the cascade model and other strategies employed by the DoE in implementing OBE. There will also

be a critical analysis of how departments managed the change process beyond the training of OBE.

Chapter Three outlines and explains the choice of research design and methodology used in this study. The role of the researcher is clearly explained. Also included are the specific measures used to ensure research ethics and credibility of the results.

Chapter Four introduces the empirical research conducted to further understand the problems and issues highlighted in this study. The case studies used in this dissertation are rural schools in Limpopo Province. Findings at the site of the case study (the school), are analysed and conclusions drawn.

Chapter Five presents the final conclusions, recommendations as well as the limitations of the study and how these could have impacted on the findings of this research.

1.7. CONCLUSION

This Chapter not only introduces the reason for this study but it also highlights the fundamental problems experienced by teachers and department officials in the implementation of OBE. The aim of this study is to analyse the OD related issues hampering implementation and at the same time to find ways in which these issues can be resolved. Ways will be explored on how organisational development interventions can impact on the creation of an enabling environment. This would ensure that curriculum changes do not hamper the development of the school, but rather ensure that the school is equipped with skills to manage change effectively so as to ensure that the transformation that South Africa seeks is given an opportunity to flourish. Methodological issues were presented in an introductory way and the further programme of research outlined. The next chapter includes an explanation of why South Africa saw a need for curriculum change, a brief look at the National Qualifications Framework and OBE, a more detailed discussion of organisational development, the impact of change, and what can be done to make the change process an empowering one.

CHAPTER TWO

LITERATURE REVIEW

2.1. INTRODUCTION

The idea that the education system must change after South Africa changed from apartheid to democracy had been under serious discussion long before the African National Congress (ANC) took its official position as leaders of the South African democracy. However, if one looks at the Constitution of the Republic of South Africa, 1996 (Act 108 of 1996), one can see that it provides the basis for curriculum change in the new South Africa. The Constitution embodies the values of the new South Africa, which the changes in the education sector also seek to embody in the knowledge and skills it develops. In the preamble, the Constitution states that its aims are to:

- Heal the divisions of the past and establish a society based on democratic values, social justice and fundamental human rights;
- Improve the quality of life of all citizens and free the potential of each person;
- Lay the foundations for a democratic and open society in which Government is based on the will of the people and every citizen is equally protected by law; and
- Build a united and democratic South Africa able to take its rightful place as a sovereign state in the family of nations.

2.2. RATIONALE FOR THE CURRICULUM CHANGES SINCE 1994

Due to the past policy of apartheid education, South Africa did not have a national education system. Rather it was characterized by various departments that functioned separately from one another. In particular, education for ‘Blacks’ was placed under the jurisdiction of Education and Training and the

six independent homelands (Christie: 1992). The following quotation best sums up this situation with the observation that, “the racially exclusive departments, provinces, homelands and self-governing territories have resulted in an excessive fragmentation of the South African education into 19 different education departments, a concern raised by opposition groups as far back as the early 1950s. Such a fragmented structure has prevented the implementation of a single national policy on any matter” (DoE 1997d: 9). It was this extreme fragmentation that demanded, with the new democratic government, that the new education system be transformed into a single national system. The reason was simple: To change the historical inequalities that were so embedded in the education system, the system had to be completely overhauled to meet the demands of the new democracy and to redress past inequalities. More importantly, with the apartheid Christian National Education system and specifically the Bantu Education Act, many people were denied access to information, skills and experience that are critical to develop the country and its economy (Christie: 1992).

With the new government determined to bring about speedy transformation and economic growth, a system that would change the negative impact of Christian National Education and Bantu Education was critical. Therefore the discussions and policies evolved into the strong conviction that the system adopted must promote critical, analytical and creative thinking. Moreover, the system must be able to streamline the nineteen education departments into one. This need paved the way for the National Qualifications Framework (NQF), a policy that would be of equal benefit to all South African citizens, that would emphasize the concept of lifelong learning, and would further the goals of democracy and economic stability. In this framework, there would be a transformation of formal mainstream education and Adult Basic Education and Training in the business sector, with the goal of bringing synergy to the development of the South African population (Phillips: 1996). In the NEPI Report (1992) it is stated that a curriculum policy for South Africa needs to be grounded in an

analysis of existing circumstances and to be meshed with goals for future social development (DoE 1997d: 10). It was with this focus that transformational OBE was born within the NQF to lead South Africa into the 21st century. OBE was seen as the logical method of teaching and learning to be introduced into the new formal education system to ensure that the concepts outlined in the NQF are achieved. The new system that housed this OBE method was called Curriculum 2005 which was later adapted in the Revised National Curriculum Statement (RNCS). In a nutshell, Curriculum 2005, which embodies the principles of transformational OBE, hopes to unify the South African education system and achieve the social values that the Constitution so eloquently enshrines.

2.3. THE ROLE OF THE NQF

The key idea of the NQF is that all qualifications gained in various learning contexts will be based on clearly defined national standards against which people will be assessed to determine competence and earn credit. The system will recognize competence and will emphasize what learners know and can do. Furthermore, people can follow various learning pathways to achieve the standards, and learning will be more relevant to the needs of learners (Phillips: 1996). The following important advantages of the NQF should be mentioned:

- it gives persons access to nationally accepted qualifications;
- it is a map showing different learning pathways;
- it enables persons to acquire qualifications through both formal and informal learning situations;
- it closes the gap between education (knowledge) and training (skills);
- it focuses on what must be learned rather than what must be taught;
- and
- it recognizes and gives status to different kinds of learning.

(Independent Examinations Board 1998:11)

Therefore the NQF will see a shift from institution-centred learning to learning that is more relevant to learners' needs. Learners will also be able to combine credits for unit standards into national qualifications. However, for this change to be authentic, the NQF has outlined principles which require qualifications to be:

- credible both in South Africa and around the world;
- coherent in that they provide clear learning pathways;
- relevant in that they take into account changing knowledge, technology and occupational structures;
- quality focused in terms of nationally agreed learning outcomes and assessment criteria;
- flexible enough to be gained anywhere and at any age and in ways other than through formal education;
- accessible in providing appropriate entry points and multiple pathways to the qualification;
- portable in that they recognize the importance of generic and transferable skills;
- responsive to the rapidly changing needs and diversity of South African society and its economy;
- reflective of the needs of both learners and providers of learning;
- progressive in that learners can progress through the eight levels of the NQF;
- articulated so that learners' achievements are recognized across providers;
- effective and efficient in the use of resources, in order to minimize cost barriers to learning; and
- appropriate in that they are 'fit for purpose'

(Phillips 1996:8)

The above principles of the NQF are clearly aimed at ensuring that the South African education system reaches its goal of bringing about equality in the standards provided in the various sectors and to all citizens. Moreover, these principles recognise the element of change and its impact on development, and that South Africa needs to be equipped to be responsive to the changes brought about by various dynamics. Finally, the very nature of these principles reveals that the new education system aims at ensuring the sustainable development of the country as a whole.

2.4. THE RELATIONSHIP BETWEEN ORGANISATIONAL DEVELOPMENT AND SUSTAINABLE DEVELOPMENT.

As outlined in Chapter One (see paragraph 1.2.), one of the fundamental obstacles in the successful implementation of OBE has been the lack of people and human resource development. In general, the training did not include programmes that would equip the education sector with skills to manage the change to the new system and neither did it take into account the serious difficulties faced by the under-resourced and underprivileged schools, especially those in rural areas. Furthermore, the training did not take into account the issues of poor educator qualifications and re-training. For the successful and sustainable development of OBE, these factors must be taken into consideration, especially for change of the magnitude of OBE. Organisational development in its very nature and focus, i.e. looking at developing people and institutions in a holistic manner, aims at bringing about sustainable development. But what does sustainable development mean?

Sustainable development has been a fairly complicated issue to understand and implement. There are many views, theories and approaches as to how it can be achieved. According to Coetzee in *'Development is for People'* (1987:153), development using the hermeneutics approach can only be created by consensus, pluralistic tolerance and direct democracy. Development interventions should be implemented in a way where all peoples' personalities

are realized and their lives enriched. All interventions should therefore emphasize the need to involve all those who are supposed to benefit from development. People should not be the object of development planning but an integral part from the initiation to the realization of the goals. According to Coetzee (1987:162), the idea that development can be a top down approach where the interventions are designed by planners and then delivered by technicians and agents at the local level cannot be entertained. Authentic development where people develop their self-reliance can only be achieved by ensuring that all beneficiaries of the development are contributors to the development process. To ensure its sustainability, development should be a total educational experience with the whole community being involved. The ultimate aim should be the liberation of human creative potential and the mobilization of human resources in order to solve social, political, economic, and material problems.

Therefore, sustainable development cannot be achieved through *enlightened despotism*, i.e., a process of the people, for the people but without the people (Encyclopedia Britannica). Rather, it can only be possible with the direct participation of all in the process. However, it is also crucial to understand that participation is more than just an information blitz or a quick meeting - participation by the people has to be authentic with definite structures in place that allow for the people who are to benefit from the interventions and changes, to have the space and opportunity to apply themselves constructively (Coetzee 1987:153). The question then arises: Did the DoE's and other organisations that undertook to provide OBE training to teachers keep the above characteristics of sustainable development in mind?

2.5. ORGANISATIONAL DEVELOPMENT

2.5.1. THE ROLE OF ORGANISATIONAL DEVELOPMENT IN EDUCATIONAL CHANGE

From personal involvement in the education sector as a trainer, materials developer and evaluator, it has been observed that organisations often responded with training and support to the skill shortages/needs of schools, for example, that of Mathematics and Science. The recent call by the DoE for the improvement of Mathematics and Science education in South Africa has also reinforced this narrow focus on teacher and school development. This emphasis on one or two subjects has, in many ways, reinforced a fragmented approach to training and support. Although this approach seems to be changing in that recent interventions, especially programmes from certain ‘donor’ agencies (for example Open Society for SA, Joint Education Trust and Research Triangle Institute programmes in the Limpopo Province), are looking at whole district development, it still does not look at developing the school as a self-standing, functioning learning centre. It has been observed that in general, the training trend is to train a few select people who are then expected to make a difference to their schools by training others at the school with their newly acquired skills and knowledge. This method is known as the cascade model and is the preferred model for the implementation of OBE and Curriculum 2005.

From discussions with various teachers during the researcher’s role as a trainer and evaluator in the education sector, it appears that some teachers have been expected to re-train on curriculum changes after receiving a one-day training programme. It is the opinion of the researcher that most educators or management staff who receive training and are expected to cascade it into their schools, are actually unable to share and enrich their schools with their new knowledge in the way the cascade model hopes to achieve. Salim Vally (1998:16) also mentions that “the cascade model of training where a group of trained teachers impart their knowledge to others who in turn would pass it on has also proved not as successful as envisaged.” Apart from the message

“getting badly distorted as it travels down the human chain” (Vally 1998:16), these ‘trained’ teachers have to go back into a school environment that has not changed and therefore they find it difficult to incorporate the ‘new’ ideas into the school’s programme. The school, because of its very own dynamics that have not changed, cannot create the space or support for the trained teacher to make any significant contribution. This leads to a sense of paralysis on the part of the ‘trained’ teacher and therefore on the whole implementation process. Furthermore, in most training programmes, the teacher generally receives training in OBE but does not receive any training or support in terms of managing conflict, managing attitudes, or the general management of people when cascading these skills. The result is that the new ideas, approach, and skills acquired in the teachers’ training courses become difficult to implement, the enthusiasm loses its impetus and the training programmes dwindle into mediocrity or failure. Thus, the training that was designed to empower the person to effect changes at the school has actually created a somewhat dysfunctional situation. According to Vally and Spreen (1998:16), preliminary studies of the in-service training of Curriculum 2005 suggest that most teachers were generally critical of the workshops and found them of limited benefit in the classroom. More importantly, many involved in the training process pointed out that in order for change to take place, very real institutional changes will be needed. Thus far, the interventions are often initiated without assessing or improving the readiness level at the school that is to receive such training programmes and this compounds the problem of sustainability. Therefore, it has been suggested that teachers should be directly trained and that schools that are confident with the demands of the new curriculum should go ahead with implementation, while schools that are unprepared should be allowed the flexibility to implement the new curriculum within a reasonable time frame (Vally 1998). No doubt, if educators feel that “they are unhappy with life in the organisation but believe that they themselves have no hope of making it better” (Schmuck and Runkel 1994:10), the untested assumption that they can become

the peer cadres to inject enthusiasm and skills development in their environment is in itself problematic.

Therefore, clearly, to create an enabling and self-sustaining school environment, there needs to be more than just a 'needs' training on what is deemed the fashionable focus of the day. The training should be looking at the whole organisation and providing interventions that would empower both the individual and the system. Therefore, OD has a definite place in developing the school environment.

2.5.2. THE CONCEPT OF OD

What is OD and why is it important in an educational environment? Schools are social organisations, made up of people who have to interact with each other in a very intense and dynamic way. It consists of departments, various levels, structures, systems, management teams, parent bodies, and learners. Therefore it must be viewed in the totality that it is. The whole school can only be understood when all its elements and its relationship with its broader environment is acknowledged and included. Davidoff and Lazarus (1997:35) state that “we cannot develop an organisation (school) without developing the people who work in the school; thus professional (human resource) development is seen to be a necessary aspect of organisation development.”

All organizations are made up of certain elements which need to function in a particular way to ensure that the whole organisation is healthy. Any aspect of the organization that shows itself to be malfunctioning will have an impact on the whole system (Davidoff and Lazarus 1997). Therefore it is critical that all components of the institution gain skills and insight into how they should function and how they need to contribute to the healthy functioning of the whole system. As stated by Morrison (1998:xii), the effective way to manage change and to empower people is by addressing the human side of an organisation.

In a nutshell, organisational development is an intervention and a process that looks at an organisation in its totality and the aim of which is to harness and mobilize the strength and skills of the available human resources to improve the organisation's effectiveness and efficiency in its day-to-day functioning (Tutorial letter: MEDEM3-S/103/99:5).

2.5.3. THE HISTORY OF OD

Since the mid 1950s, OD has been used in industrial and governmental organizations. Nowadays, organisational development has become an important strategy for building organisational capacity in many different types of organisations. It has become an important strategy for school development (Davidoff and Lazarus 1997:36). Although the educational environment has been largely influenced by work done in industry, many modifications of the methods have been made to suit the special characteristics of the education environment (Schmuck and Runkel 1994:10).

According to Schmuck and Runkel (1994:11), there are three social-psychological conditions that make schools different from most industrial organizations. These are:

EDUCATORS' GOALS: Educators' goals are different in that:

- rapid change in the educational sector with various new pedagogical needs makes it increasingly difficult for the sector to understand the needs and requirements;
- educators work very hard towards goals that are not concretely defined because of the nature of meeting these ends. Aspects such as mental health, intellectual ability, creativity are difficult to measure;
- educators must cope with new students every year and yet at the same time the goals can actually only be realized when students become adults. There are also very few, if any, indicators that measure the interim development of the students; and

- educators work and develop human beings and are therefore always in relationships where influences are exerted and this makes the measurement of progress more complicated.

HIERARCHY AND SPECIALISATION OF WORK: Schools, both big and small, have three to four levels of hierarchy and the specialisation of work at the different levels do not differ that greatly from each other. It is, therefore, less difficult to embark on OD interventions than in organisations that have as many as 18 levels of hierarchy. According to Schmuck and Runkel (1994:12) many levels of hierarchy make it difficult for OD to make changes at one level as the different levels display relationships of power that impact on OD work.

SOCIAL PRESSURE: Although schools and educational institutions are less vulnerable to competition than industry, they are more vulnerable to community pressures. Furthermore, as there are many more stakeholders (who each come with their own special issues) to consult and include, OD work can become difficult as the changes need to be communicated between all stakeholders.

It is clear that OD can assist schools to create an enabling environment so that they are able to “achieve a sustained capacity for solving their own problems” (Schmuck and Runkel 1994:13). Davidoff and Lazarus (1997:37) further elaborate that an enabling environment is “an environment which is flexible enough to change and adapt to environmental demands.” No doubt, through OD efforts, schools could develop their values in interpersonal relationships, participation in, and commitment to quality in their environment. Davidoff and Lazarus (1997:37) further outline the key characteristics of organisational development as including:

- a focus on the development of people and structures;
- a reflection of humanistic and democratic values;

- emphasis on organisational self-renewal;
- emphasis on planning and goal setting;
- focus on an open problem solving climate; and
- ongoing action planning and reflection;

2.5.4. TYPES OF OD DESIGN

In order to develop the school in its totality, a range of different methods can be employed to ensure that optimal development in all aspects of the school is undertaken. According to Lazarus and Davidoff (1997:37) there are two types of strategies that are used in OD. One is person-centred, in which staff, students and parents are included. The second strategy focuses on the structural change of the school. Schmuck and Runkel (1994:28), provides three OD designs that can be implemented in an educational institution. Below is a brief explanation of these designs.

2.5.4.1. TRAINING

In South African schools, training has been the most common type of OD design where the OD practitioner or external facilitator determines the learning outcomes and organizes activities for the staff.

2.5.4.2. SURVEY–DATA FEEDBACK

In this OD design, information is systematically collected through questionnaires, interviews, observations and informal discussions. This information is then reported to a working group to use as a basis for diagnosis, problem solving, and planning. It is imperative that the OD practitioner is adept at collecting information and is able to communicate the information to participants in a captivating and effective manner.

2.5.4.3. PROCESS OBSERVATION AND FEEDBACK

This OD design is intended specifically to get participants to become more aware of how they work together in a group. The OD practitioner mostly

observes how the group works and occasionally will comment on the process or pose a question that will get the group to reflect on the process.

These design types can be used mutually exclusively or they can be combined to ensure that the desired goals of the institution are achieved. However, to ensure that long term sustainable solutions are achieved, the design would need to go through various stages or phases in its planning and intervention cycle.

PHASE ONE: START UP AND MEMORANDUM OF UNDERSTANDING

For productive change to occur, a significant part of the group needs to see that something is wrong and they need help to correct it. For the practitioner to get support from the group, there should be at least verbal commitment from all those who would be part of the process. Communication about the possible intervention must be done with all involved and not only with the powerful participants. Here it is useful to have a memorandum of understanding drawn up. This indicates that the OD project is indeed underway. This memorandum should include the project's goals and time frames. It should be made available to, and agreed upon, by all stakeholders.

PHASE TWO: DIAGNOSING CURRENT FUNCTIONING

During this phase, detailed information about the present situation is gathered. This information is important in deciding what interventions are going to be necessary. Multiple methods should be used to access information. Furthermore, insight and foresight are needed as this can also be a sensitive phase since people can become negative and unwilling to provide honest feedback about the current situation.

PHASE THREE: DESIGNING THE OD PROJECT

Schmuck and Runkel (1994:33) divide this phase into:

- Macro aspects: Here the overall structure, sequence and forms in which activities would flow are developed; and

- Micro aspects: These include the activities that would be carried out in a limited time period.

It is a challenging task for an OD practitioner to tailor the macro and micro aspects of the overall design with the specific objectives and level of the participants.

PHASE FOUR: ASSESSING DESIGN AND MONITORING PROGRESS

It is critical that the design is tailor made for the institution and its particular diagnostic data. Before a design is implemented it should be assessed by ‘scrutinizing it and trying to anticipate what could go wrong before it does go wrong’ (Schmuck and Runkel 1994:35). Questions that should be asked in this phase are who does the macro design relate to in the diagnosis of the institution and how does it further the goals set for the project. If necessary, the practitioner would need to redesign aspects to ensure that it is within the overall goals of the project and that it addresses the needs of the participants.

PHASE FIVE: TERMINATING THE INVOLVEMENT OF THE OD PRACTITIONER

For the sustainability of the project, it is crucial that the OD practitioner must prepare participants to continue with the project after the OD practitioner has left. If this is not done properly, it will create a sense of dependency on the OD practitioner.

PHASE SIX: INSTITUTIONALISING OD

If the OD efforts are to continue, then it must become part of the daily routine of the organization’s operations. By establishing procedures and structures to maintain the ‘new’ skills gained and needed for organizational adaptability, OD itself can be institutionalised.

In Table 2 below, the goals of OD are succinctly outlined:

TABLE 2: GOALS OF OD

SHORT RANGE	LONG RANGE	ULTIMATE METASKILLS
1. Clarifying communication 2. Establishing clear goals 3. Working with specific conflicts 4. Improving group meetings 5. Making clear decisions 6. Assessing progress	1. Understanding different roles 2. Developing clear communication networks 3. Understanding different goals in the system 4. Uncovering larger conflicts for problem solving 5. Involving more personnel in decision making 6. Establishing procedures in searching out innovative practice	Institutionalized norms, structures and procedures for: <ul style="list-style-type: none"> ○ diagnosing, ○ gathering information, ○ mobilizing synergistic action ○ monitoring other metaskills

(Schmuck & Runkel 1994:55)

In this study, the researcher mainly used training and survey-data feedback as explained by Schmuck and Runkel (1994). Process observation and feedback were also used to gather more information on the issues that faced the staff and the school (see paragraph 2.5.4.). The researcher also adopted the phases outlined above. However, not all guidelines given were used and Phase Six was not attempted due to time constraints.

2.6. EDUCATIONAL CHANGE

2.6.1. MANAGEMENT OF ORGANISATIONAL CHANGE

People live in a world where change is constant, where everything is dynamic and sometimes even turbulent. Especially in South Africa, where over the last few years the pace of change has been dramatic, it is imperative that people learn to live with uncertainty and, therefore, need to acquire skills that will enable them to respond to change and the demands it places on people and

institutions. The nature of the education sector makes it more vulnerable to constant innovation and change as it is embedded in a social and community system. Morrison (1998:3) argues that change and reform in education are inescapable because education, as an indicative component in sociocultural and economic renewal and development, is caught up in changes that are wide-ranging. Van Niekerk (2003:182) further states that “because schools are subject to continuous change, especially since 1994, they should put in place a meaningful and purposeful strategy for change and school development. In order for school improvement and development to take place, changes in schools have to be brought in that increase their capacity and performance for continuous improvements.” Managing educational change can be quite complex as there are so many levels that must be addressed. According to Kendall (1989:28), the following levels need to be studied: The individual, in that one needs to ascertain the change in the individual and how s/he changes others; the institutional; the organisational; the community; and the wider environment.

It is only over the last few decades that the process of change and how it impacts on people and institutions has been studied in an in-depth and systematic manner. The person who is generally seen as a pioneer in the field of change management is Kurt Lewin (Schmuck and Runkel:1994). He developed a model for understanding how change impacts on people and the outcome it has on institutions. He stressed that people go through a cycle when faced with change and if, in this cycle, people are not supported and given the necessary coping skills, the change process becomes stagnant, destructive and obstructive (Schmuck and Runkel:1994). In simple terms, Lewin identified the three phases as *Ending*, *Neutral* and *New Beginnings*. People need to go through these phases so that they understand and internalise the change and their role in it. If the people and their emotional and psychological needs are not taken into consideration when bringing about structural and policy changes,

then the policy does not have the will and commitment of the people who are actually the driving force (Hersey and Blanchard:1993). In the case of the education sector and OBE it is the teachers as well as the circuit and district officials who are the driving force behind the effective and successful implementation of any educational change. Although there are many views on change, Lewin's model seems useful for analyzing curriculum changes in SA, as he proposes a three stage change process that moves from one state of existence, through an intervention, and achieves a desired future state (Ideas for Change 1999). This approach, therefore, is based on the assumption that a change process can be planned through a designed intervention and that change occurs progressively and is goal orientated (Ideas for Change 1999).

2.6.2. KURT LEWIN'S CHANGE MODEL

The following discussion is based on an adapted working document of Lewin's change model. These adaptations and expansions are the result of workshop inputs developed by the late Helen Robb of the Qhubeka Network (Robb 1996).

2.6.2.1. ENDING PHASE

The ending phase is characterized by separation. This is where the 'unfreezing' occurs or a sense of 'conclusion' takes place. There is a general feeling of loss even if the change is for the better. People experience grieving which is both real and anticipated and there is a feeling of 'letting go.' The further feelings associated with this phase are shock, denial, not ready to take in information, anxiety, sadness, depression, low energy, and blame. The stress that one experiences is the stress of 'who loses what' and the loss of certainty. Therefore a person in this phase would need to talk and be listened to, to be reassured, to be supported. The person needs to be honest, be self reflective, to take the time to gain a feeling of centredness. Impatience should be avoided as this could lead to blaming and preaching (Robb:1996).

2.6.2.2. NEUTRAL ZONE

This period is characterized by a feeling of being neither here nor there. It is a transition that is generally accompanied by a sense of chaos, confusion and a sense of stagnancy. Feelings generally associated with this phase are anger, sadness, uncertainty, tension, confusion, loss of faith, loss of direction, loss of confidence, and a feeling of not knowing who to be angry with. The stress that one would go through is the lack of familiarity and predictability (Robb:1996). It is in this phase that there is a tendency to want to regress or resign or take the package or emigrate. The person in this phase therefore needs to redefine and reorientate himself or herself, build allies and strengthen the team or core group. It is important that, in this phase, the effort, progress, and creativity be monitored and rewarded. Options must be encouraged and discussed and feelings attended to. Again, the person would need time and support.

2.6.2.3. NEW BEGINNINGS

This is the phase where the desired change has happened and these changes should now 'refreeze' in their new state. There is an incorporation of ideas where the vision is clarified and therefore goals and plans can be developed. In the reviewing and re-evaluation, there is a feeling of taking from the old, in other words, valuing things that can be incorporated into the new way. Here people are generally looking forward with a sense of leadership and are making or have made paradigm shifts. The feelings associated with this phase are hopeful, optimism, excitement, stimulation, energy, motivation, realism, and patience. Here all progress is acknowledged and victories (both big and small) are celebrated. However, stress is also experienced as people must be able to identify needs and find strategies to facilitate the changes. In this phase, a person also has needs that must be addressed to maintain the change. These include trust building, ongoing planning and evaluation, feedback, encouragement, honesty, training and support, commitment, consistent behaviours, support and time.

From the above model, it may be seen that to understand and take people through change is a demanding process. But it is essential that the well-being of the person is taken into consideration. If this is not done, then there is the possibility that the change fails or does not gain the desired momentum. It is human nature for people to resist change as it aims to take people away from their comfort zones that they have built (Hultman 1998). Therefore, when change is imminent, people generally respond to this change in a variety of ways, especially if the change is dramatic and calls for substantial change in people, organizations and institutions, like that demanded by OBE.

Thus, in any change process, there are two forces at work, i.e. the force of change and the force of resistance (or ‘action’ and ‘reaction’). Therefore, for any change process to be successful, it is equally important to work with the force of resistance, to see it as a valuable resource that brings in new perspectives and ensures that peoples’ interests are brought into play (Hultman 1998). Change agents should, therefore, listen to resistance, uncover it, work with it and recognize its value (Ideas for Change 1999). In *Ideas for Change* (1999 Part 4:14), many reasons for resisting change are outlined. However, the one that aptly describes the general resistance to OBE is termed “too much too soon.”: In this type of resistance, it is not the change that people will resist but the pace of it. People are caught in the tension of having to do their present work, to keep things going and to take on new things (meetings, planning sessions, extra work, and training). They are overwhelmed by the sheer pace of the change and the demands that it places on them.

2.6.3. THE PROACTIVE INTRODUCTION OF CHANGE

For any change effort to be effective, it is the way it is approached and implemented that will determine its success. Morrison (1998:17) describes the nature of change as successful when it is congruent with the existing practices in the school, understood by all, communicated effectively and seen to be an improvement on existing practice.

However, there are many techniques and skills one can put to use before a change event is brought into the organisation. These techniques also give the change agent some idea of where people are at in terms of the change and what the best way to handle this change would be.

One simple yet effective technique is the force field technique. This is a creative process that is used to identify the forces that either promote or inhibit change (Hersey and Blanchard 1993:63). Before embarking on any change strategy, it would be useful to determine what is to be achieved in this change effort by systematically assessing the driving forces (positive) and the restraining forces (negative).

Once the force-field analysis is done, one can analyse the results and use the following guidelines:

- If the driving forces far outweigh the restraining forces, managers interested in driving for change can push and overpower the restraining forces;
- If the restraining forces are much stronger than the driving forces, then managers have a few choices:
 - Give up the change effort seeing that it would be too difficult;
or
 - Pursue the change effort by concentrating on the driving forces and immobilize the restraining factors so that they are no longer factors in the situation; and
- If the forces are fairly equal the change agent may begin to push for the driving forces and at the same time convert or immobilize the restraining forces.

(adapted from Hersey & Blanchard:1993)

It is also incumbent upon the change agent to be clear on the approach used for sustainable change. For example, the change agent should, amongst others,

make the reasons for the change explicit to the people, focus on key issues, create conditions for regular interactions, give change the time it needs and link the change process to people's aspirations (Ideas for Change Part 4:1999).

2.6.4. BARRIERS TO EFFECTIVE CHANGE

According to Flederman (1997:14), "studies in the 1970s looking at innovation in education pointed to the fact that many failures occurred not because of the merit of the innovation, but because of the method of implementation". Flederman (1997:14) also outlines common reasons why so many change attempts fail. These are:

- lack of commitment and ownership;
- lack of input by key stakeholders in decisions;
- inadequate resources;
- ambiguous power relations; and
- over dependence on models, formulas and guides.

Interestingly, these reasons for failure are also commonly given in various debates, discussions and newspaper publications as reasons why the implementation of OBE at schools has been so problematic. However, in order to understand the problem of implementation, it is important that one has a clear idea of what OBE is and the demands it places on the education sector. The characteristics of OBE are discussed in greater detail below.

2.7. THE ROLE OF OD IN THE CHANGE TO OBE

2.7.1. THE CONCEPT OF OBE

Since the introduction of the new curriculum and OBE, there have been many debates and discussions as to what exactly OBE is and how it is going to be implemented in SA. According to William Spady (1992:5), who is seen as the 'father' of OBE, Outcomes Based Education is about preparing students for life, not simply getting them ready for university. This means focusing and organizing a school's entire programme and instructional efforts around the

clearly defined outcomes that all students should be able to demonstrate when they leave school. These outcomes must be practical and primarily significant to life after school. From an OBE perspective, it is not a matter of what students have experienced or what courses they have taken; it is a matter of what they can do when they exit the system (Spady 1992:6).

From various readings, lectures, workshops, and media reports one can deduce that OBE's key objective is to ensure that all learners are equipped with the knowledge, skills, and values that they will need to fulfil various roles in society. This is, therefore, achieved by having clearly defined outcomes that learners will work towards attaining in their various learning contexts. Thus the school environment in both structure and functioning must support and encourage learners to achieve these outcomes.

The core assumption that underpins OBE is that all learners can succeed at their own pace and that the way the school is operated and managed will have an impact on the level of success of the learner. Thus OBE is learner-centered in that the emphasis is on what the learner should be able to know, to understand, to demonstrate, and to become and not what the teacher wants the learner to achieve. This shift demands that learners become active participants in the learning process and are expected to take responsibility for their own learning. The educator is required to give opportunities to learners to work at their own pace and in different ways according to their individual abilities and levels of development (DoE 1997a).

According to a DoE's information booklet on OBE (DoE 1997c), there are three types of OBE:

Traditional OBE

Here the curriculum remains constant but the focus is on the outcomes. The outcomes are specific and not holistic and are often not linked to skills that the

learner would need in work and general life. These outcomes are elicited from the syllabus. Traditional OBE does not really challenge the conventional nature of the school day.

Transitional OBE

This type lies between traditional and transformational OBE. It extends beyond the traditional as it uses the subject matter as a vehicle to assist in the cultivation and integration of higher order competencies. In transitional OBE, critical thinking, problem solving, and effective communication skills are emphasized. However, this type does not allow enough real change to take place.

Transformational OBE

This type is seen as important to ensure educational reform as it is seen as future-orientated, not just creating good students to graduate at the end of the school year. It is designed to equip all students with knowledge, competence and orientations that they will need to successfully meet the challenges, demands, and opportunities in their lives. Its clear focus is on a person's lifelong adaptive capacities. In transformational OBE, critical outcomes (with the knowledge, skills, and attitudes that people need to function as critical citizens) become the sole determinants of a new curriculum. Schools are allowed to choose content and use teaching methods of their choice as long as these meet the critical outcomes and develop people who display the agreed-upon critical outcomes. This allows educators to relate their teaching directly to their local contexts.

“Success at school (or any other place of learning) is considered to be of limited benefit unless learners are equipped to transfer that success to life beyond school and are able to see learning as a life long process, which is essential to keep pace with rapidly changing conditions in the world of work and in society”

(DoE 1997c:19)

The type chosen by South Africa is no doubt that of transformational OBE as it meets the demands of the rapid social change that South Africa is facing. This type will be the best to address the transformational needs of South Africa, especially to develop a critical, economically stable, and democratic society.

The important characteristics of Transformational OBE are:

- integration of concepts in a cross curricular approach which includes the structure of curriculum, instructional methods and assessments;
- learners are put first in any curriculum development or learner-centered approach;
- cooperative learning is a key element;
- progress is monitored using a range of assessments through integrated tasks;
- educators are responsible to construct meaningful learning to ensure the mastery of outcomes; and
- learners progress at their own pace towards mastery of the outcomes

(Spady 1992:10)

2.7.2. OBE AND CURRICULUM 2005

In South Africa, the OBE approach was first housed in the new curriculum called Curriculum 2005. It is within this curriculum that the outcomes were derived with reference to SAQA, the NQF and the vision of the new South Africa. However, a distinction is made between the two types of outcomes that characterize Curriculum 2005, namely, the ‘essential’ or ‘critical cross-field’ outcomes and the ‘specific’ outcomes. The seven critical cross-field outcomes are those that pertain to all learning areas, which determine the competence, knowledge, and character that South African citizens should achieve through their lifelong learning process.

The seven critical cross-field outcomes are:

- Communicate effectively using visual, mathematical, and/or language skills in the modes of oral and /or written presentation;
- Identify and solve problems by using creative and critical thinking;
- Organise and manage themselves and their activities responsibly and work effectively with others in a team, group, organisation and community;
- Collect, analyse, organise, and critically evaluate information;
- Use science and technology effectively and critically showing responsibility towards the environment and the health of others;
- Demonstrate an understanding of the world as a set of related systems. This means that problem solving contexts do not exist in isolation; and
- Work effectively with others as members of a team, group, organisation, community

(DoE 1997a).

Specific outcomes are outcomes that pertain to a learning area. For example, Social Sciences have outcomes that are different to that of Language, Literacy and Communication. These outcomes have been developed to focus on the specific learning areas taking into account the specific knowledge and skills for that learning area. Another key feature of OBE in Curriculum 2005 is the integration of learning areas to make learning occur in a broader context (DoE 1997a). For example, if one had to use the theme of 'Water', various activities using this theme in the different learning areas can be planned and delivered. In the RNCS, the Critical Outcomes remain the same and the Specific Outcomes have been modified and simplified. However, OBE is still the key methodology and therefore the demands placed on schools still remain the same.

The question that begs is: How can these outcomes be attained in a day-to-day teaching and learning process? The ‘design down deliver up’ principle provides the clearest explanation of how outcomes can be attained in a learning experience (Spady 1992:16). Simply put, the ‘design down deliver up’ method is achieved by the teacher deciding on the outcome s/he would like to achieve in a learning experience. With this outcome in mind, s/he would plan activities from the basic to the more complicated that would provide the best learning path for the learner to attain this outcome. Basically, from the outcome, one would design down to the simplest step for the final attainment of the outcome. During the learning process, from step one to the subsequent steps, the educator is delivering up to the final culminating demonstration. The intention behind the ‘design down deliver up’ principle is that the educator does not lose sight of the outcome that needs to be attained (IEB:1998).

Another key principle of OBE is expanded opportunities. This principle, simply understood, is to provide various ways and learning contexts for learners to demonstrate their achievement of the outcomes. This comes from the fact that all people are different and not only learn at different paces but also the level of effectiveness that learners demonstrate can be in a variety of ways. For example, some learners can demonstrate their learning by writing while others prefer a verbal context. Therefore, this principle of expanded opportunity is fundamental in understanding and making OBE work in the classroom. (Spady 1992:16)

According to Spady (1992:18), education should be managed by five practices:

- Define outcomes: Clear outcomes that must be achieved need to be set;
- Design the curriculum: Clear decisions and processes need to be set to manage the teaching and learning in terms of linking what should be learned to the outcomes that need to be achieved;

- Deliver instruction: Once the curriculum plans are complete, they must be put into practice at the learning sites;
- Document results: Learning needs to be assessed during and at the end of the learning process. This ensures the management of the process and the final assessment of the culminating proof of the achievement; and
- Determine advancement: Once the process is complete and the learner has succeeded, the next decision is to understand and plan for the next step or the next level. Also, if the outcomes have not been achieved, then other ways must be designed to provide opportunities for the learner to achieve success.

2.7.3. ASSESSMENT IN OBE

From the above explanations and understanding of how OBE works and the demands it makes on educators, learners, and the teaching and learning process, it is clear that the shift to OBE also demands enormous changes to be made to the assessment of learning. With OBE being a learner-centered, result-orientated approach to education, it implies that the way learners are assessed must be changed accordingly. No longer could the old system of end-of-year examinations be sufficient to assess the progress the learners make in attaining the outcomes. By the very nature of OBE, in which learners have to work towards an outcome where progress is determined by demonstration, assessment in OBE also requires a radical shift in terms of approach, timing, recording, and reporting (IEB 1998).

In the *Assessment Policy in the General Education and Training Band* (Government Gazette 1998), the purpose of assessment is explained as:

“In keeping with the principles of the NQF, assessment will serve to:

- determine whether the learning required for the achievement of the specific outcome is taking place and whether any difficulties are being encountered;

- report to parents and other role players on the levels of achievement during the learning process and to build a profile of the learners achievement across the curriculum;
- provide information for the evaluation and review of learning programmes used in the classroom; and
- maximise learner's access to the knowledge, skills, attitudes, and values defined in the national curriculum policy.

The assessment purposes outlined above show that the paradigm shift required for the successful implementation of OBE is complex.

Some of the assessment principles are:

- the criterion-referenced approach is to be used;
- the purpose should always be made explicit;
- assessment must be authentic, continuous, multi-dimensional, varied and balanced;
- the methods and techniques used must be appropriate to the knowledge, skills, and attitudes to be assessed as well as to the age and developmental level of the learner;
- assessment must be bias free and sensitive to gender, race, cultural background, and abilities; and
- evidence of progress in achieving outcomes shall be used to identify areas where learners need support and remedial intervention.

In order to ensure that the functions of OBE are maintained in the assessment of learning, different types of assessment need to be applied to different learning contexts. These types are not mutually exclusive and can be integrated into an overall assessment process. The different Outcomes Based Assessment (OBA) types are:

- *Formative assessment:* Where the positive achievements of the learner are recognised, discussed, and the appropriate steps for further learning

are planned;

- *Diagnostic assessment:* Where learning difficulties are gathered and appropriate remedial help and guidance are designed and provided;
- *Summative assessment:* Where the overall achievement of a learner is recorded over a period of time in a systematic way; and
- *Evaluative assessment:* Where learners' achievements are compared and information is aggregated so that this information can be used to assist in curriculum development and the evaluation of the teaching and learning process (IEB 1998).

Basically, assessment in OBE consists of the progress of learning, the process of learning, the diagnostic purposes, and the outcomes. The fundamental shift with assessment in OBE is that assessment is done on a continuum and not only at the end of a learning experience, it is criterion-referenced, and it is an open and transparent process (DoE 1997a). Learners must be aware of the criteria, what they are being assessed on, and how. In OBE, learning is a shared responsibility and therefore assessment also becomes a shared process.

2.7.4. OD INTERVENTIONS IN THE CHANGE TO OBE

From the above explanation of OBE, assessment and how it aims to work in the classroom, it is clear that OBE and its implementation is complex in its very nature. It certainly requires more than just one day of training. Moreover, coupled in the demands OBE makes on teachers and schools, is the need for organisational development interventions. The change from the old to the new curriculum demands a paradigm shift in teaching, assessment, and the way teachers view their role and their learners. In a country where, amongst others, resources and teacher qualifications are also problematic, this process becomes even more complex to deliver.

Therefore, it is imperative that teachers receive direct training and support on OBE as well as skills to improve the functioning of the school as an

organisation to ensure success. Some of the OD interventions that should be considered in OBE training are:

- re-structuring the school as an organisation;
- technical support;
- interpersonal relationships and dynamics, in particular teamwork and team planning, as this is crucial to the new curriculum and OBE;
- change management: Effective and ongoing management of the change process;
- leadership, strategic planning, and management;
- action research and reflective practice;
- staff professional development and appraisal;
- conflict management; and
- anti-bias course that deals with issues of prejudice and diversity.

Although schools are different from one another and will require a ‘tailor-made’ programme of intervention, the above suggestions would improve the functioning of the school and therefore the implementation of OBE and the resulting quality of teaching and learning.

2.8. CONCLUSION

In this chapter, an effort was made to explain in some detail the requirements of OD and some thoughts were presented on change and the various skills and techniques that can be used when institutionalising change in any institution. An explanation of OBE and how it is implemented in South Africa has also been outlined. Understanding the dynamics of change and how to ensure its sustainability is key to the successful implementation of OBE in schools. The next chapter provides a detailed explanation of the methodology used in this study.

CHAPTER THREE

THE RESEARCH DESIGN AND METHODOLOGY

3.1 INTRODUCTION

The previous Chapter provided the literature review for this study and attempted to provide a broad overview of the content of the study. This Chapter is a continuation of Chapter One in terms of the outline of the research methodology adopted in the study and attempts to provide a sound understanding of the qualitative research paradigm and how it is used in this study.

3.2 THE QUALITATIVE RESEARCH PARADIGM

According to Macmillan and Schumacher (1993:371), qualitative research can be classified as primarily interactive field research or primarily non-interactive document research. For this study, the use of this paradigm was most appropriate because of the nature of the topic to be researched as it involves the study of human behaviour in its own unique setting. The characteristics of the education sector make it easy for researchers to use a qualitative paradigm because it aims to understand people's behaviour. According to De Vos et al (1998:249), practitioners in the caring professions are in a unique position to collect data regarding their participants' daily lives and therefore it is easier to adopt a qualitative approach to problem solving.

In contrast to quantitative methods, the qualitative paradigm aim, as postulated by De Vos et al (1998:243), is to “understand reality by discovering the meanings that people in a specific setting attach to it.” Thus participants' behaviour at the research site is intentional and natural and therefore the qualitative researcher's focus is:

- to understand the phenomenon as it presents itself;

- to conduct naturalistic observation; and
- to explore the reality as it is presented from an insider's perspective.

(De Vos et al 1998: 243)

These focal points demand that the role of the researcher is not a detached one as in quantitative research. Here the researcher needs to be immersed in the situation and become part of the group that is being studied so that a full understanding of the observed phenomena is reached. In other words, the researcher often fulfils the role of a participant observer. The researcher in this study, as a participant observer, holds the belief that “human behaviour is influenced in many ways in the milieu or setting in which it occurs” (De Vos et al 1998:280). Therefore the researcher spent a considerable amount of time at the site of study, observing the natural day-to-day habits of the participants. Thus the reality that was being studied can be described as “multi-layered and interactive” (Study Guide 2, MEDEM2-R 1999:76).

A few characteristics of qualitative research are:

- research involves holistic inquiry carried out in a natural setting;
- humans are the primary data gathering instrument;
- purposive rather than random sampling;
- design emerges as the research progresses; and
- utilisation of intuitive insights (Borg and Gall 1989:385).

Miles and Huberman (1994:92) state further that qualitative research can be seen as having an open agenda where the researcher interprets and contextualizes the situation in an open manner, and where data collection occurs spontaneously and as close to the natural situation as possible.

Educational research, due to the complexity of its nature, requires a deep understanding of the issues and problems at hand, and therefore requires a research methodology that can provide a broad and in-depth understanding.

Creswell (1994:5) therefore maintains that in a qualitative research paradigm, the process is inductive with a mutual shaping of factors. Unlike quantitative research instruments that can blind the researcher to the site and its context (Miles and Huberman 1994:91), qualitative research provides a wider insight into subtle contextual dynamics. However, qualitative research should be systematic, rigorous, strategically conducted, flexible and contextual, and produce social explanations that can be generalised in some way (Mason & Bramble 1989:5). All of the above characteristics and features of qualitative research make it appropriate for this particular study. For example, the choice of the school as the site of study was purposive in itself. It was a rural school that displayed all the difficulties generally experienced by rural schools in that it was understaffed, under-resourced and situated in a poor parent community. Furthermore this school also experienced other difficulties, for example, poor matric results, an inability to maintain discipline, internal conflict, and lack of motivation to embrace the new curriculum. The researcher spent many hours at the site of study merely observing the participants in their natural setting, gathering data, designing the research and trying to get an in-depth understanding of the dynamics at the site.

3.3 APPROACH: CASE STUDY

In qualitative research, it is quite common to use the case study approach as it encapsulates all the requirements and characteristics of qualitative research. Dockrell and Hamilton (1980:33) provide an apt definition of the case study as:

“Case study is the examination of an instance in action. The study of particular incidents and events, and the selective collection of information on biography, personality, intentions and values, allows the case study worker to capture and portray those elements of a situation that give it meaning.”

A case study in simple terms concentrates on a study of a single bounded system where the focus is on one phenomenon, which the researcher selects to

understand in an in-depth way. According to Macmillan and Schumacher (1993:375), a case study provides some very useful methods in educational research because of its flexibility and adoptability to a range of contexts, processes, people and foci. Furthermore, in a case study, researchers are able to discover and pursue the important topics and issues in education. In this case study, a rural school was used as a single site that was studied in-depth by the researcher, who was present as part of the day-to-day routine of the school in order to gain an understanding of the context.

3.4 VALIDITY

Due to the open-ended and exploratory nature of qualitative research, researcher bias is a potential threat to validity. According to Johnson & Christensen (2000:207), this bias can be due to the researcher's selective observation and selective recording of information. Furthermore, researchers can quite easily and unknowingly allow their personal views and perspectives to impact on the research process and on the interpretation of the data. In general, case studies have been criticised for lacking validity due to the nature of how the investigation is conducted and the assumption that each site is "the study of a bounded system" (Stake 1988:255), and therefore not very representative of other cases. A key strategy in understanding researcher bias is reflexivity. This means that the researcher actively engages in critical self-reflection about his or her potential biases and predispositions. Through this process of reflexivity, the researcher becomes more self-aware so that attempts are made to control and monitor his/her biases (Johnson & Christensen 2000:207). It is important that in a case study, the researcher reports clearly and accurately on all that happened.

Taking into account the above issues of validity, serious attempts were made in this study to ensure that an objective and a true reflection of the context as it unfolded and presented itself, was recorded. The researcher made attempts to be critical of the process and the data being recorded. One useful yet simple

strategy used by the researcher was to ask ‘why’ for every conclusion made during and after observation or an interview. This ensured that the researcher remained critical of the data and the process. The researcher also conducted peer reviews with persons who were not involved in the study but who, with their knowledge and skills, were able to help the researcher to remain as objective as possible which helped to provide useful insights.

The researcher made attempts to further validate the findings by comparing findings and conclusions with another school (see paragraph 4.5.5.) and with another non-government organisation (see paragraph 4.5.1.). The researcher interviewed and observed a school in the same village that did not receive any training and support from the researcher. This was done to check if the training and support provided by the researcher to the chosen site did indeed make a significant difference to the school. The researcher chose a school in the same village so that factors affecting the school would more or less be the same as that of the chosen site. Furthermore, the researcher compared results with an organisation that conducts a training and support project to a cluster of similar rural schools to see if there were any similarities in the findings and conclusions. Here the researcher used documents generated by the organisation on the progress of the schools as well as an interview with the project manager (see appendix 2).

3.5 TRIANGULATION

The researcher needed to ensure that the data collected at the site was a valid reflection of the dynamics of the site in order to improve the credibility of the results and determine whether the conclusions drawn are generalisable or not. To find regularities in the data Macmillan and Schumacher (1993:498), state that researchers should compare different sources, situations and methods to see if there are recurring patterns. Therefore, similar to most researchers in the qualitative paradigm, the researcher used triangulation, which in simple terms

suggests that the researcher used multiple methods to collect the relevant data. “The opportunity to use multiple methods of data collection is a major strength of a case study research” according to Merriam (1991:69). According to Merriam (1991:69), methodological triangulation combines dissimilar methods to study the same topic so that the flaws of one method are used as the strengths of another. In this study, the researcher used observations, interviews and documentation analysis to collect data on the phenomenon studied.

3.6. PERMISSION FOR RESEARCH

The researcher, as an organisational development practitioner, was approached by the school to assist in improving the general management of the school and the outcomes-based programme that they were expected to implement. After an initial meeting, the researcher proposed the idea of combining a training programme with a research study, as the school provided the researcher with a good case study to pursue the belief that OBE can only be successfully implemented and managed in schools that have sound management and organisational development skills. As suggested by de Vos et al (1998:258), the staff was presented with the aim and object of the proposed investigation and how it would be undertaken. The researcher further discussed the practical aspects of data collection and the recording of data. The researcher gave the assurance of honesty and integrity throughout the research. It was not difficult to get the cooperation of neither the staff nor the stakeholders as the researcher had embarked on other organisational development programmes in the area and had already established a good reputation in this regard. However, before any work began, the school stated their willingness to be part of the programme and study in a letter to the researcher. Permission was also verbally granted by the School Governing Body, as well as the regional and provincial DoE offices.

3.7 ROLE OF THE RESEARCHER

It must be stated that the role of the researcher in this case study was more than an observer of the process. The researcher also played the role of an organisational development practitioner who, through training and support, attempted to bring about change and development in the school environment and thereafter observed what impact the interventions made on the implementation of OBE. The researcher also acknowledges that certain biases were brought into the study. Although every effort and various strategies were used during the study to ensure objectivity, these biases may shape the way the data was viewed, understood and interpreted. After various work experiences in organisational development and outcomes-based education, the researcher commenced this study with the perspective that effective implementation of outcomes-based education can only be achieved by developing schools in a holistic manner, in other words, by providing development and support programmes according to the needs of the schools. The researcher believed that teachers and management teams, especially in the previously disadvantaged schools, required in-depth training and intense support in various components of the school (e.g., curriculum training, conflict management, time management, assessment, record keeping, strategic planning, and team-building) to become functional and effective in order to adapt and deal with changes in the curriculum.

3.8 METHODOLOGY

Due to the characteristics of qualitative research and the adoption of the case study design, it is imperative that a range of methods are used to ensure that the study yields the results it hopes to gain in a trustworthy manner. Therefore a detailed explanation of the methods used to gain an understanding and insight into the phenomenon being studied are outlined below.

3.8.1 PARTICIPANT OBSERVATION

Participant observation plays a very important role in educational research as it ensures that the researcher spends a considerable amount of time in the subjects' natural habitat so that the researcher can gain first hand data on how the subjects lead their day-to-day lives (De Vos et al 1998:280). Participant observers see their subjects in a holistic way and are primarily concerned with the process rather than the outcomes. However, by virtue of being directly and actively involved in the site studied, the participant observer gains insights and develops interpersonal relationships that can only be achieved through this method (Borg and Gall 1989:391). Borg and Gall (1989:391) further state that the level of this participation can be varied. For example, in complete participation the researcher becomes a full member of the group. The researcher can also function primarily as an observer but may participate to gain rapport with the subjects, and thus gain a better understanding of the group dynamics. Moreover, by observing and recording impressions and happenings one can develop first-hand knowledge of the actual context and how people behave within this context. One of the advantages of participant observation, according to De Vos et al (1998:292), is that it is particularly flexible and questions can be asked quite casually without it being regarded as uncalled for. However, it is important to obtain relevant data, so the researcher need to remain focused on the task as it is very easy to become distracted from the topic. Bias is also a factor in this method as the "idiosyncratic perceptions and interpretations of the observer, influenced by previous experiences, affect the recording of the behaviour" (Macmillan and Schumacher 1993:258). It must be mentioned though that one clear disadvantage of this method is that "most participant observation studies are single case studies so they make no claims to generalisability or their attempts towards generalisation remain implicit" (De Vos et al 1998:293).

In this study, the researcher spent one year at the site, playing, amongst others, the role of participant observer. In the early days of fieldwork, unobtrusive measures in observing and taking notes had to be used. The following was observed: the staff as they went about their day to day tasks; their meetings; teaching in the classroom; interaction within the staff, learners, Governing Body; and the general atmosphere of the school. The researcher attempted to collect data and provide an analysis of how they (staff at the school) go about understanding and implementing OBE at the school before and after a programme of organisational development training and support. This observation occurred on a weekly basis for the first six months and then on a more irregular basis for the next six months. Notes were made on what was physically observed as well as on comments and feelings. It needs to be mentioned that, due to the length of time spent at the site and the nature of this case study, an enormous amount of data was collected. However, the researcher included only the essential information (a mere fraction of the findings) in this study.

As stated above, the researcher also played other roles during this study. A key role played by the researcher was that of a change agent. The researcher provided organisational development and curriculum training and support to the staff at the site. Gold (1958) in De Vos et al (1998: 269) aptly describes one of the roles played by the researcher as that of a full participant who, during the course of the research, becomes involved in the central activities of the subjects under study. However, the researcher was aware that this role could have undermined the validity of the results and findings. To minimise this potential threat to validity the researcher held discussions (questions like: “Did you notice this behaviour or change? What did you notice when you did your observation?”) with peers and used data collected by the peers who were also involved in the training and support programme at the school. In this way data collected, observations made, and conclusions drawn by the researcher could be verified.

3.8.2 INTERVIEWS

Interviews are a very useful technique for accessing information and are generally necessary when the researcher cannot observe the subjects' behaviour, feelings, or how they interpret their context (Merriam 1991:72). According to Powney and Watts (1990:355), an interview can be described as a conversation between two or more people where one person takes responsibility for reporting the substance of what was said. In this study, interviews took place at various stages and with all the staff members for the purpose of understanding the subjects' life experiences as expressed in their own words (De Vos et al 1998:299). Different types of qualitative interviews were used in this study. Informal conversational interviews, which are spontaneous and loosely structured (Johnson & Christensen 2000: 144), at the beginning of the study, were quite useful as the discussions were essentially exploratory in that the researcher was trying to learn enough about the situation to formulate questions for subsequent interviews (Merriam 1991:74). The researcher made notes during discussions and casual 'chats' with the subjects. Although Johnson and Christensen (2000:144) suggest the use of a tape recorder due to the casual nature of this type of interview, the researcher preferred to make notes of the discussion as it was less intrusive and more personal. These notes were made during the interview when possible, or immediately after so as to record the data and findings as accurately as possible.

The second type of interview used in this study was the interview guide approach. In this type of interview, the researcher developed a plan to explore specific topics, together with a set of specific open-ended questions. Here the interviewer did not have to follow the questions in any specific order but allowed for a more unstructured style. However, the interviewer still covered the general questions and topics with all the interviewees (Johnson & Christensen 2000:144). The researcher was very aware of ensuring that the discussions kept to the focus of the study.

Thirdly, standardised open-ended interview was also used in this study to a limited extent. According to Johnson & Christensen (2000:144), in this type of interview the interviewer enters the interview session with a standardised interview protocol. In using this type of interview, the researcher developed open-ended questions before the interview and each interviewee was asked the same questions in the same order.

The final type of interview used to collect data in this study was focus group interviews. This is a type of interview in which a moderator leads a discussion with a small group of individuals to examine in detail how the group members think and feel about a topic. The moderator uses open-ended questions to generate the discussions (Johnson & Christensen 2000:147). During this study, the researcher found this type of interviewing very useful in gaining insight and information on the subjects' thoughts, feelings and ideas on OBE and OD. In fact, the teaching staff preferred this method to one-on-one interviewing. Macmillan and Schumacher (1993:432) state that "by creating a social environment in which group members are stimulated by the perceptions and ideas of each other, one can increase the quality and richness of data through a more efficient strategy rather than one-on-one interviewing."

At various stages during the study, interviews were conducted with various staff members who included the management teams. The researcher also used the key informant interviews for a more in-depth understanding with individuals who have a special knowledge and status in order to gain richer information and deeper understanding. Again, although tape recordings would give a far more accurate account of what transpired during the interviews, they were not used in this study as it was more important to honour the request made by the staff and maintain the trust developed between the researcher and the individuals. Furthermore, a more personal and conversational situation was seen as far more favourable in getting a natural reflection from the interviewees.

It must also be mentioned that, in this case study, interviews were held before any intervention or other methods were employed to simply assess the situation before any interventions were made. In other words, the researcher first conducted interviews with subjects and key informants before any training and support were conducted. Thereafter, interviews were conducted during and at the end of the training programme. In any research, an interview as a data collection method has both advantages and disadvantages. An interview allows one to get to the heart of the issue by asking the right questions, probing and eliciting information from people who are directly experiencing the issues being researched. In the interview, ideas expressed by the interviewee can be probed, clarified and elaborated. This echoes the view of Cohen and Manion (1990:272) that “it allows for greater depth than is the case with other methods of data collection.”

However, an important disadvantage of this method, as recognised by Macmillan and Schumacher (1993:251), is that the interviewer can unintentionally and unconsciously become involved with the issues and therefore taint the findings with subjectivity and personal bias. According to Cohen and Manion (1990: 273), the cause of invalidity in using interviews is often bias. They suggest that results should be compared to other sources that have been shown to be valid, and, in this way, if the two sources are similar, then it can be safely assumed that the results are valid. Therefore, it is imperative that the interviewer is constantly aware of the problem of bias and distortion, and devises strategies to ensure that it is greatly minimised. Although it is difficult to escape the human factor during the interview, a good interviewer and researcher, as suggested by Merriam (1991: 75), should refrain from arguing, be a good reflective listener, and should listen with lively interest. The researcher also used the skill of ‘re-stating’ to occasionally rephrase a response for clarity and understanding. Merriam (1991:76) further states that the success of the interview is determined by the researcher remaining non-judgemental, sensitive and respectful towards the interviewee.

In this research, responses to questions and discussions were written down during the discussions and further notes and reflections on the interview were made immediately after the interview.

The researcher made sincere attempts to make the subjects feel comfortable with the interview process during the study. Requests from subjects were taken into consideration, for example, not using tape recorders. From the beginning, the researcher remained honest and committed to the process and established a cordial atmosphere so that the subjects felt secure and confident to contribute in a free and meaningful manner, as advised by De Vos et al (1998:302). Once the subjects recognised the integrity of the researcher as their change agent and as a researcher on this topic, and then relaxed, both the subjects and the researcher found the interviews to be quite a pleasant way to obtain information. Also, the natural progression of questions during the unstructured discussions gave a more in-depth understanding of the issues. As stated by Prof. S Shultze, if the interviewer establishes a good rapport, asks questions in an acceptable way and in general does his/her job well, and if the respondent is sincere, then accurate data can be obtained (Study Guide 2. MEDEM2-R 1999:83). All the interviews were conducted on site so that subjects felt comfortable in their familiar environment. Since the researcher was on site on a regular basis, times for the interviews were negotiated accordingly. It must be noted that the researcher chose not to include an in-depth interview response gained from the staff as an appendix as the researcher used direct responses of the participants in the data analysis to highlight the findings (see Chapter 4). Instead, the in-depth interview that verified the findings were included (see appendix 2).

3.8.3 DOCUMENTATION

According to Macmillan & Schumacher (1993:433) personal and official documents are two types of artefacts produced by educational institutions that can be useful in research. Both these types of documents were studied, including, for example, policy documents, minutes of meetings, previous

workshop materials, personnel records, teacher's preparation schedules, and manuals. These provided significant data that assisted in verifying and understanding the information gained from the other research methods used. Creswell (1994:151) points out a distinct advantage in using documents, i.e. that it enables the researcher to obtain the language and words of informants. However, the concern with the use of documentation is that generally documents state what the intentions are rather than that which actually happens (Harber 1997). Furthermore, Creswell (1994:151) argues that the documents may not be authentic or accurate. All these points were taken into account when attempting to understand and synthesise the data from documents.

3.9 ETHICAL ISSUES

The researcher established openness and trust right at the outset of the study by being completely transparent about the purpose of the study, the way data would be collected, and how the data would be used. Subjects were informed that their participation in and cooperation with the study was voluntary, and that the researcher would also be guided by what the participants determined as important data. According to De Vos et al (1998:259), to set the foundations for a contractual relationship between the researcher, subjects, and gatekeepers, the researcher must create an atmosphere of equality, where the parties enter into the research agreement as equals. A clear understanding of how observations and interviews would be conducted was discussed and agreed upon. For example, it was agreed that the researcher alone would conduct all the interviews and that no tape recorders would be used. Most subjects were more comfortable with focus group interviews rather than individual interviews. Classroom observations were done on a voluntary basis and subjects decided when the researcher could visit and observe. Discussions were held with the subjects after the observations. The researcher assured subjects that their interviews were strictly confidential and that the information

gained from the interviews was for research purposes only. The researcher also used technique of re-stating to ensure minimal misunderstandings occurred. At the end of every interview, the researcher provided the interviewee with a summary of all that was discussed so as to verify the accuracy of the data obtained. Often, and in common with other case studies, the researcher held spontaneous casual discussions with subjects. The researcher always asked the subject for permission to use the points brought up in the discussion in the study. The researcher also respected the right of the subjects to decide which staff meetings could be attended by the researcher.

Furthermore, the researcher spent a long time on site, observing and gaining information and insights into the dynamics of the site. In other words, the researcher adopted the strategy of prolonged engagement (De Vos et al 1998:261) to become familiar with participants, their environment, and to gain subjects' confidence. The researcher also learned more about the cultural habits of the subjects so as to ensure a greater respect and understanding of how they function and respond to the study. These measures were used to help increase the level of confidence and trust between the researcher and the participants.

3.10 CONCLUSION

This chapter focused on the research paradigm used and on an explanation of the methodologies used. Further, this chapter outlined the reasons for adopting the qualitative research paradigm together with a fairly detailed explanation of the data collection techniques. The role of the researcher was also discussed. The focus in the next chapter will be on the interpretation and analysis of the data obtained.

CHAPTER FOUR

ANALYSIS AND INTERPRETATION OF DATA

4.1 INTRODUCTION

The previous Chapter focused on the research design and the different methodologies used to obtain data for this study. This chapter is an analysis and interpretation of the data collected in the form of documents, observational notes and interviews.

According to Taylor and Bogdan in Merriam (1991:130), the goal of qualitative data analysis is ‘to come up with reasonable conclusions and generalisations based on a preponderance of the data.’ Some concerns in data analysis, as stipulated by Gans in Merriam (1991:95), were definitely experienced by the researcher. This relates to the worry about the flow of research activities and the anxiety about how to make sense of what one is studying. The researcher spent eight months on site and therefore collected a large amount of data that needed to be coded, categorised and analysed. Furthermore, the ambiguity of the researcher’s role as a participant observer created some anxiety in terms of when to be detached and when to be involved. The researcher was very aware of this ‘schizophrenic’ role and tried to ensure that it did not adversely affect and influence the findings.

4.2. DATA AND ANALYSIS OF DATA BEFORE ANY INTERVENTION

4.2.1. INTERVIEWS

Before any organisational development interventions were conducted, the researcher interviewed key individuals and held focus group discussions. The aim was to understand the general situation at the school and the staff’s

understanding of the curriculum changes. Interviews with the departmental officials revealed that there were differences between how the departmental officials, on the one hand, and the teachers on site, on the other, perceived the situation with regards to curriculum changes.

The departmental officials revealed that the province used the cascade model for all its training on OBE and Curriculum 2005. In 2000, there were one hundred and forty provincial officials trained to cascade the training for implementation, made up of 50 from the Foundation Phase and 90 from the Senior Phase. The cascade process was on five levels: National; provincial; regional; district; and school. The 50 Foundation Phase officials were in turn expected to train and support 4549 Grade One teachers and 4566 Grade Two teachers. Although there were twenty pilot schools for the implementation of OBE at the Grade Seven level, the implementation of OBE in this grade for all schools had 90 provincial officials to train 4580 teachers (these figures exclude figures in two regions). The interviewees confirmed that the 1999 budget was sufficient to accomplish the goals they had set for implementation. In 2000, all schools were implementing Curriculum 2005 in Grade One and Two.

When asked the question, “How successful is the implementation of OBE in the school?” the interviewees felt that they were not too concerned about the implementation process purely because they felt that the teachers and departmental officials were functioning to the best of their abilities. They were aware that the teachers were faced with the challenges of lack of transport, not enough learner support materials and the existence of only one policy document in some schools. The interviewees stated that they understood that regions and districts did not meet the requirements because of problems related to transport and other typical rural logistics. Furthermore, the officials realised that the teachers needed more training on integration and assessment that the department could not deliver at that point, especially since the budget also did not allow for outside service providers to be brought into the training process.

All the interviewees sounded optimistic and confident that Limpopo was 'moving in the right direction' and that they were functioning very well within their constraints.

Unfortunately, the teachers who were interviewed did not share the departmental officials' optimism. Perhaps this does not come as a complete surprise as, according to Vally and Spreen (1998:14), the Limpopo province has fallen behind in terms of educational service delivery, especially in terms of teacher preparation and resource materials. Moreover, only a few selected officials have attended government workshops. There are still many under-qualified teachers and there are subject teacher shortages. The teachers interviewed felt that they had been 'sidelined' in the implementation process and that they had not received adequate training to implement OBE. They felt that they were getting a lot of pressure from the department to implement the changes in the curriculum. The teachers indicated that they did not know what they were supposed to do and they 'just carry on..... [And]...will see what happens.' One teacher laughed and stated that they paid lip service to the district official who 'does not know anything about OBE himself.'

The different perceptions on the success of the implementation process are clearly the result of the cascade model. It seemed as if this model did not work as well as expected, especially when it was 'watered down' five times. Teachers expressed quite clearly that they, 'were all swimming in the dark.' Assessment was a thorny issue. Teachers did not know how to conduct outcomes-based assessment or how to integrate assessment into their learning programmes and daily preparation. When asked who from the department could give them assistance, they stated that they could not ask anyone in their districts purely because the district officials did not have the skills and knowledge themselves.

4.2.2. QUESTIONNAIRE

A questionnaire was developed to gauge the general and specific knowledge of the staff on the new curriculum (see Appendix 1). This was completed in writing by all twelve staff members before any organisational development interventions were conducted. From the responses to the questionnaire (see appendix 1), it is evident that the teachers were not familiar with the new curriculum, as shown by a select summary of responses:

Question 1: Describe the National Qualifications Framework (NQF) and explain its role in the new education system.

Only two out of twelve respondents showed that they had some understanding of the NQF and what it meant for the education system.

Question 2: Do you have a copy of the policy documents relevant to the grades you are teaching? If not, have you looked through a policy document at any point?

All respondents stated that they had not looked through one nor did they have one in the school.

Question 3: Are you able to change your approach to learning and teaching by interpreting and applying the new education policy? If yes, in what way.

All respondents answered 'NO'.

Question 4: What is a learning programme?

No respondents could answer this question

Question 5: What do you understand by the term group work?

The respondents knew that group work was part of the new curriculum but showed little understanding of how to manage group work in the classroom.

Question 6: In your own words describe at least 2 critical outcomes

Respondents could not describe the outcomes and many of them had clearly confused the terminologies. For example, some respondents named two learning areas.

Question 7: How is OBE managed at your school?

All respondents stated that it had not started as they did not know what to do.

Question 8: Are you coping with the demands of the new curriculum?

All respondents answered 'NO'

4.2.3. OBSERVATION NOTES

The researcher spent the first few weeks at the school observing how people worked with each other and trying to assess the general atmosphere of the school. Some points worth mentioning are:

- there was a lot of tension amongst the staff members. There were two groups, i.e. management (and those seen to be supporting management) and those who were not. Staff meetings were very stiff with members of the different camps arguing over issues that seemed fairly simple to conclude;
- there was no sense of urgency or energy amongst the staff. They almost seem to plod to class and wasted a lot of time between lesson changes and tea breaks;
- they had no sense of loyalty to the school or their learners. They spoke quite negatively about their own school and its community;
- there was a lot of blaming going around. No one wanted to take responsibility for the school and their role in the present situation;
- they were very wary of the School Governing Body. From the first meeting with the SGB in 2001, there was a lot of distrust and finger pointing. The parents blamed the teachers and the teachers blamed the parents and their home situation; and

- notes taken by various teachers who attended OBE workshops were kept by the teacher and not shared with the rest of the staff, nor did the staff member conduct a ‘training’ with the rest of the staff.

Other points worth mentioning include:

- the school’s telephone often did not work. They could only receive incoming calls and not make outgoing calls;
- the school had no computer; and
- they had no photocopying or printing facilities. The nearest one was 40 kilometres away.

4.2.4. DOCUMENT ANALYSIS

Accessing documents was a real challenge as the school did not have an efficient and user-friendly administration system. The reason for this state of affairs was partly because they had little space to house their documentation and partly because they were not familiar with how to design and manage a system. However, the following information was gleaned from various documents:

- teacher absenteeism was a problem;
- learners always came a few days late to school at the beginning of each term and almost a month or two late at the beginning of the year;
- there was no official file for the minutes of staff meetings. A few teachers had minutes of some meetings held over time. The minutes were very unclear and no one could remember what the issues were about; and
- from the logbook, one could see that the school had very few visits from DoE officials from either the district or circuit office. The reason cited for this was that the school was too far away in a ‘deep rural’ area.

4.2.5. ANALYSIS OF FINDINGS

It became evident from the general discussions, casual interviews and the above questionnaire that none of the teachers had sufficient knowledge of OBE, the reasons for change, or any other important background information, for example, the NQF.

Interestingly, was that most of the teachers interviewed agreed that they do need a new system to change the apartheid legacy of unequal education and to align their learners to the demands of the new South Africa. Unfortunately, many of them did not know whether Curriculum 2005/OBE was the correct path mainly because they felt very insecure with their lack of skill and knowledge. Many of them stated quite strongly that they would be able to get on with things if only they could get the necessary training and support from someone who could help them on the ground. It therefore became quite clear in the initial data gathering phase that the teachers were not opposed to the changes in the curriculum. Their main problem was that their training was not adequate or substantial; they did not get any support, and felt abandoned. Their frustration, therefore, lay more in the expectation that they should implement curriculum changes and OBE without the necessary skills. This later spiralled the teachers into feeling insecure about themselves and their situation.

The optimism expressed by the departmental officials and the pessimism of the school teachers revealed the different levels that people seem to function on and see progress. The above findings are in line with the sentiment that “provinces are struggling to keep within budget, have barely enough money to meet recurrent costs, and have very little money available for new initiatives. At the same time they are faced with the urgency of delivery and visible educational reform. This also raises the question of the nature of systemic change – how much transformation is occurring and how much remains the same” (Motala 1997:2).

From observations it also became clear that the staff at the school were very pessimistic about their general situation. Although they all lamented the fact that the staff was not a cohesive team, they did not seem to know how to change it. The School Governing Body had no confidence in the staff and instead of finding ways to understand and improve the situation at the school; they became very 'heavy' towards the staff and the principal in particular. They, too, did not know how to cope and what proactive measures they could initiate to change the situation at the school. Many parents opted to send their children to other neighbouring schools. The school, therefore, experienced a decrease in learner intake. This lack of confidence by the School Governing Body and the community in general added to the dismal outlook the staff had, and made them feel even more resentment towards the community. In fact, one teacher even felt that the only hope they had was that the school would eventually be closed, after which they would be placed in another school. She felt that this was the only way out for her. The teachers who had previously gone on an OBE training programme did not have the motivation nor the support from the rest of the staff to share their knowledge. Furthermore, the teachers who went on these workshops were chosen by management, while the teachers who were seen as against management were marginalized. This prompted even more resentment within the staff.

Lastly, the school's state of maintenance left much to be desired. It needed a lot of physical repairs (e.g. broken windows, incomplete flooring, and damaged chalkboards and notice boards). Furniture was also a problem, with many broken chairs and desks merely piled up and stored in the classroom. There was also no drinking water available. The principal brought in drinking water every day for the staff and learners. These difficult physical circumstances also added to the difficulties and despondency of the staff and learners. Many felt that the physical barriers were insurmountable, such that they were too paralysed to even attempt OBE as they felt that they could not deliver with such meagre resources. As stated by Vally (2000:4), "There is a view that teachers in

disadvantaged schools have to be creative in mustering additional resources and inventing alternatives, but without adequate training and resources to sustain their initiatives, this is akin to providing teachers merely with ‘a lamp and three wishes.’” Many of the teachers felt that the departmental officials expected them to come up with miracles rather than acknowledging that it was difficult for them to implement changes and OBE under such trying conditions.

4.3. IMPLEMENTATION OF OD INTERVENTIONS

After the above initial interviews, document analysis and observations, the researcher embarked on the task of sifting through information (e.g. coding and categorising) and holding peer discussions to come to some understanding and insight into how the OD programme should proceed. The researcher came up with a suitable draft plan, using the phases and goals of OD as presented in Chapter Two by Schmuck and Runkel (see paragraph 2.5.4.). A meeting between the staff and the researcher was held where an analysis of the researcher’s findings, opinions, ideas, and draft plan was outlined. After an animated discussion, it was agreed that the following OD interventions should be treated as urgent:

- **Outcomes Based Education Training:** The staff insisted the training starts from the very basic. This also included assessment in OBE;
- **Strategic Planning:** They felt that it would be most beneficial for them to know and commit themselves to the overall goals for the school;
- **Team building:** There was general consensus that the staff needed to start working as a team rather than in little groups;
- **Learner-centred methods:** The teachers agreed that they needed to gain skills on how to use a variety of methods, especially group work and co-operative learning in their classrooms;
- **Administrative system:** Teachers agreed that they needed a system, and committed themselves to begin with keeping minutes of meetings as a

starting point. They felt that many options needed to be explored and considered to take care of this problem; and

- **On-going support:** Teachers were very pleased with the idea of on-going support and committed themselves to being part of weekly meetings with the researcher for ongoing support and assessment of their progress.

Over a period of three months, workshops with the teaching staff were conducted on the identified interventions. These workshops were done in a very participatory and empowering manner. A key strategy used by the researcher when conducting these workshops was to incorporate team-building exercises into the broader workshop. This strategy seemed successful as the staff worked together in a very authentic way towards their common goal of developing their skills, and at the same time, was strengthening their working relationship.

Since the teaching staff was expected by the DoE to implement OBE at Grade Nine level, they wanted to commence immediately with training and support in OBE. The researcher conducted the OBE training and provided support to the teachers on a weekly basis for three months. As with the team building exercises, learner-centred methods and assessment strategies were incorporated into the broader weekly OBE workshops. The researcher planned the workshops such that the staff directly experienced various learner-centred methods and assessment strategies while working on activities during the workshop. This gave them a hands on understanding of how these methods can be used in the classroom, provided the teaching staff with a holistic understanding of OBE, and how OBE can be implemented in the classroom.

The workshops took place after school hours and were not longer than two hours. The follow-up support visits after each workshop proved useful as it helped the staff to check if they were ‘on the right track’.

In terms of the other identified interventions, the researcher and staff prioritised and began with a strategic planning workshop. This was the only workshop that took place over a weekend.

Workshop manuals, developed by the researcher, were provided to the staff. Support was provided in groups as well as with individual teachers.

4.4. DATA ANALYSIS AFTER INTERVENTIONS

During the follow-up period after the main training programmes were completed, various staff members were interviewed. The interviews were mostly unstructured focus group interviews. The aim was to gauge the impact of the training programmes on the knowledge and skills levels of the staff.

The researcher also continued with observations. This included sensing the general atmosphere in the school and interaction between staff members. In addition, the researcher was invited by some of the teachers to conduct classroom observations. Document analysis focused on how the staff recorded their overall OBE implementation plans as well as their own specific planning and lesson preparations. The researcher also worked with the School Management Team to improve their record keeping.

4.4.1 INTERVIEWS

The questions below were chosen from many random interviews that were held over time:

Question: How do you feel about your ability to implement OBE in the school?

All teachers overwhelmingly agreed that ‘for the first time’ they now understood what OBE was and what was expected from them. They all expressed that they were quite concerned because it demanded a lot from them as teachers. However, they did feel that this new system was definitely better

than the old one. From casual and focus group interviews the following responses are worth mentioning:

- ‘I am so excited because we, this school, know more about OBE than all the schools in the area - even more than the [staff in the] district;’
- ‘I learnt yesterday that our school is the only one in the area that has designed a Learning Programme for the year! They asked me to show them how to do it and I was able to help them with it;’
- ‘Every day I become a little more confident in the class and how I facilitate a learning experience;’ and
- ‘Many people said and I believed that I was too old to learn this new curriculum but now I see that I can also do this...I can also teach OBE.’

Question: How do members of the staff feel about the strategic planning and team building workshops and their impact on their implementation of OBE?

- ‘Just knowing where the school is going - I mean planning our goals and making direct plans to achieve them - has made a whole lot of difference to how I see myself in the school. I think all schools must have a strategic plan - it just makes sense;’
- ‘For me the most important thing is that we have found a way to work with each other. We are planning our work together. I feel easier coming to school because I feel easy being part of the staff again;’
- ‘I think just realising and finding ways to be a team again has made a big difference to how we are as a staff. We are supporting each other with all this OBE stuff.’ and
- ‘I don’t want to sound like I am negative but we still have a long way to go. But I think we all agree that we have made an excellent start because as a team we are now able to tackle all the difficulties with OBE.’

Question: How does the staff feel about the on-going support and discussions held with the researcher?

- ‘To me it feels like for the first time someone believes in usthat we can change things around;’
- ‘Many organisations made promises and said that they will help the school...nobody kept to it. You kept your word, came to meetings, set up workshops and took an interest in us. When we saw how dedicated you were to our improvement, we almost had no choice but to change our behaviour too;’
- ‘During the classroom visits and the discussions I was able to clarify a lot of things that I did not quite grasp about OBE in the workshop. It also made it easier to practise things and try them out because we know you were there to guide us;’
- ‘I think having you around made it easier for us to try things out without being afraid of failing or getting it wrong;’ and
- ‘For me the on-going support made a very big difference and gave me a lot more confidence to design my learning programmes and to use different methodologies.’

Question: How does the staff feel about record keeping?

The staff felt that now the myth that OBE demands copious amounts of record keeping had been dispelled, they felt more relaxed and more focused on what had to be recorded and how to go about doing it. They also had their preparation files up to date and had detailed notes of their lesson plans. The staff room had posters on their plans and daily schedules and a timetable. The staff also indicated that they worked one afternoon per week after school to plan the following week. Some responses included:

- ‘I feel like I am part of a real school now;’
- ‘Keeping records and working on lesson plans were such a boring task for me. Now I actually enjoy preparing my lessons and finding ways to make my lessons exciting.’

4.4.2 OBSERVATION

Some of the noticeable changes observed on various visits over the next few months to the school were:

- classrooms, even with their meagre resources, began to look more and more like OBE classrooms, with desks arranged for group work, and posters on the wall;
- teachers looked more upbeat and their enthusiasm to continue with their development increased. They even had no problems working on weekends;
- when lunch breaks were over, the teachers went to their classrooms fairly briskly as compared to the previous 'hanging around in the staff room' attitude;
- there was a greater sense of ease in how the teachers related to each other. In fact, towards the end of the year, they were all sitting in one room during breaks as compared to their little groups at the beginning of the year. They all felt like they were a team and that they were working as a team;
- a definite improvement in teacher absenteeism was recorded;
- the principal was beginning to feel at ease as he became more confident that his staff were taking and sharing responsibility;
- learners became more responsive in the classroom and the matric learners took the initiative to form a study group. In fact, a huge bonus that came out of the study was that the school improved their matric results in the year the study took place. Their results were the best in the district and they received accolades and recognition from the provincial government. These results included a few A symbols too;
- teachers were enthusiastic to 'experiment' further with various methods of teaching and assessment;

- teachers came up with other ideas and possible workshops in areas in which they would like to improve. They were using their strategic plans proactively and realistically;
- the general atmosphere in the school was definitely lighter than it was at the beginning of the year. After the improved matric results they were highly motivated to continue with their development;
- from their lesson plans and their classroom teaching one could see that the teachers really grasped many concepts and skills demanded by OBE;
- the teachers were more confident about OBE and their abilities to implement it in the various grades;
- the teachers' casual discussion with each other showed their ease at asking for help, bouncing ideas off each other, and sharing resources.

4.4.3. DOCUMENT ANALYSIS

After the training, the staff became more diligent about keeping records. For example:

- minutes of meetings were now neatly recorded and filed and left in the staff room so that all teachers could have access to them at any time;
- the School Management Team drew up a plan with definite time frames to improve their management record system; and
- teachers had lesson preparation files where they recorded how they went about preparing their lessons. Some teachers even showed a good grasp of assessment strategies.

Although the school had a long way to go for an overall improvement in their record keeping, they displayed remarkable improvement over a short period of time.

4.4.4. FURTHER SOLUTIONS

In terms of their need for printing facilities, the researcher agreed to assist the school in printing and photocopying. Together with the staff, it was also agreed

that a suitable donor should be found to donate a computer to the school. In terms of the administrative mess, it was decided that the best decision, taking into consideration the workload of the teachers and the management staff, would be to get a volunteer from the community who would be willing to assist the school in sorting out their administration and setting up a system.

4.5. VERIFICATION OF FINDINGS

These improvements in the school after the interventions and over such a short period of time were noted by the researcher and peers (other employees who were also involved with the school's development). The researcher therefore felt that in order to verify the findings other similar programmes should be included in the study. The researcher chose a project that was managed by a non-government organisation (NGO). This project had many similarities to the style and approach used by the researcher in this study. Both emphasized training and continuous support and the strong belief that all (staff, management, and School Governing Body) in the school had to be part of the programme. The project also conducted regular support visits, observations, and other support.

4.5.1. A BRIEF DESCRIPTION OF THE PROJECT USED FOR VERIFICATION OF THE FINDINGS.

The project started with six schools in Limpopo that had been renovated and refurbished by funds raised by President Mandela. Sacred Heart College was approached to develop a programme for these six schools that would enable and empower them to function as centres of excellence. A key feature of this project was that these six schools became lead schools in developing the capacity of other schools in their immediate environment. Thus, each of the six schools acted as a host to a cluster of schools in their community. The project had two main focus areas:

- curriculum development and teacher empowerment to deliver the new curriculum; and

- improvement of management practices so that they could better support curriculum delivery.

In terms of the curriculum, one of the objectives of the project was to assist teachers with their knowledge and understanding of the new curriculum policies and how to implement it in their schools. The in-school support for the teachers regarding the implementation of OBE was also an important component. These foci and objectives corresponded closely to the programme that the researcher conducted. The management workshops done in this programme included:

- team building;
- conflict management;
- communication;
- change management;
- understanding the SA Schools Act; and
- leadership.

This project was researched as a case study Joint Education Trust who reported the following outcomes of the project:

“The following changes in teacher behaviour were reported: Improved teamwork between staff members, more professional behaviour, improved communication between the school and the community. Teachers noted that they were now more willing to accept observation of their work, they also requested more assistance from their colleagues and accepted criticism of their performance” (Roberts 1999:21).

Other comments included:

- “They (teachers) also reported several changes in classroom methodology (most consistent with the implementation of C2005)

including seating learners in groups, assessing learners ‘as a whole’ and the introduction of new assessment methods;

- “.....management style had become more participative.... Teachers noted that the School Management Team met more regularly and that they discussed matters with the staff. They also commented that the School Management Team was more involved in managing the curriculum, that they encouraged lesson observations, and undertook such observations and gave teachers feedback;
- “The principal noted that teachers were now more prepared for their classes and developed their own teaching aids” (Roberts 1999:21).

4.5.2. EVALUATION OF PROJECT

An internal evaluation of the project was also conducted at the end of 2001 by the Flemish Office for Development, Cooperation and Technical Assistance (FODCTA). The following comments were made in their evaluation:

“The ‘Whole School Development’ project has brought about many significant changes in a number of schools in the Northern Province. The initial concept of using an integrated approach to improve the pedagogical context of these schools has been correct. This is especially evident in the domain of school management. For example: There is a change in the leadership styles of the principals, there is an open climate, teachers are more involved in the decision making, there is more teamwork, more responsibilities are shared”
(Heylen 2001:3)

The FODCTA report also mentions that, although several crucial skills still need to be developed, teachers were moving towards a more learner-centred approach in their daily classroom practice. The report further outlines the following improvements:

- School Management Teams were set up and assisted in creating an open school policy;

- teachers show a greater degree of self reliance and are self confident in their ability to do their jobs;
- teachers are working as teams in preparing lessons together and in supporting and giving feedback to each other; and
- teachers have very good insight into OBE and the new curriculum.

4.5.3: RESEARCHER’S VERIFICATION OF PROJECT: INTERVIEW

The researcher also conducted an interview with one of the NGO project’s cluster coordinators, who managed the training and support programme at two clusters, to ask relevant questions that would further verify the findings and conclusions (see Appendix 2).

During the interview, the following comments were elicited:

- teachers found the organisational development interventions, i.e., relevant workshops and support, most valuable;
- teachers found the intense curriculum training and support most valuable and enabling;
- the schools in the project showed significant improvement in curriculum delivery;
- the schools’ management teams were streamlined and strengthened after the interventions;
- the staff became good cohesive working teams;
- each school, due to its own dynamics, took different time periods to show improvements and successes;
- even disadvantaged schools came up with ideas to ensure that their implementation of OBE was successful;
- changing the school culture is a pre-requisite for the successful implementation of OBE as it demands a different style of management;
- the Presidential schools that received direct training showed rapid improvement and when the training programme was cascaded to the surrounding schools, the pace of change and progress slowed down;

- although there was no formal strategy to assess the impact the interventions had on the learners, it was casually observed that learners from schools that received the interventions were more independent learners who could also work well in groups;
- the continuous presence and support of the coordinator had a huge impact on the morale of the teachers in general; and
- for real curriculum change and development to take place at the school, all components of the school must be part of an OD programme.

4.5.4. RESEARCHERS' VERIFICATION OF THE PROJECT:

OBSERVATION

The researcher also conducted a site visit to one school in the cluster managed by the coordinator interviewed, and was impressed with the school and its improvements. The classrooms were abuzz with activity as learners engaged with their learning. The classrooms were arranged to facilitate group learning and were well managed and well resourced with common materials (e.g. seed pods, newspapers, magazines). Short discussions with various teachers showed their confidence in the implementation of OBE and their enthusiasm in how beneficial this approach was to their learners. They all felt very strongly that the project made a difference and impacted on the school because of its whole school development approach. It was encouraging to see teachers in one of the most rural and under-resourced areas of Limpopo showing confidence, knowledge and practical skills in meeting and delivering the demands of OBE and the new curriculum.

4.5.5. FURTHER VERIFICATION: VISIT

The researcher also visited a school in the same village as the site studied. This school has similar characteristics to the research site and was therefore an ideal example for comparison and further verification. This other school had been part of an OBE training programme of the District and a local non-government organisation. One or two teachers attended curriculum workshops conducted by

these service providers. The workshops were on an ad hoc basis and there was no follow-up support or visit to the schools. The following information was collected from discussions with the principal and circuit officer as well as from a general observation of the school:

- the principal confirmed that her knowledge of OBE was very limited and therefore she was not able to provide any support to the teachers who were selected to go on the courses;
- the school desperately needed help in administration, OBE teaching strategies and assessment;
- the teachers were not fully confident about their understanding of OBE and chose to go back to their old methods of teaching;
- there was no cascading of the workshops into the school as the teachers were not confident to share their new found skills with others;
- the school did not function as a team and it had no functioning School Management Team in place; and
- a walk to the classrooms showed no evidence of any change in teaching strategies, for example, learners were still seated in rows (no evidence of group-work at all), and the classrooms were totally bare (no evidence of interesting material like posters or evidence of learners' efforts on display).

From the above verification strategies conducted by the researcher, it became obvious that OD interventions are necessary for the successful implementation of OBE. As stated previously, OBE requires a paradigm shift in all aspects of educational development and management. This shift requires more than just an information blitz; it requires that people must be brought 'on board', motivated, and made positive about the changes they are required to implement. Teachers will only be able to bring about the desired changes if they are sufficiently equipped with skills, knowledge and a positive outlook. These skills, knowledge and positive outlook can only be achieved if teachers and their schools receive relevant OD interventions.

4.6. CONCLUSION

This chapter presented the findings of the research at the school. It further verified some of the findings at another site using similar programmes. The above results show that organisational development within the school is critical for the successful implementation of OBE. The research further revealed that, for any dramatic change to be introduced in an educational institution, the attitudes, skill levels, and general empowerment of the human element are pivotal in ensuring success. It became clear that all teachers wanted simplicity, clarity, good training and support for them to embrace the demands of OBE. Both the research in the school as well as in the Presidential Schools project, show that, with support and appropriate training programmes, even the most rural of schools are able to become excellent centres of Outcomes Based Education. The next chapter consolidates the research and outlines simple and practical suggestions on how curriculum changes should be implemented in schools. The limitations of this study will also be discussed.

CHAPTER FIVE

CONCLUSIONS AND RECOMMENDATIONS

5.1. INTRODUCTION

In the previous Chapter, the data collected from site observations, interviews and verification methods was presented. In this Chapter, conclusions drawn from the study and recommendations are outlined. The limitations and strengths of the study are also discussed.

5.2. INTERPRETATION OF DATA AND CONCLUSIONS

The findings in this study show that organisational development interventions are vital for the successful implementation of OBE. The implementation of OBE is a complex process and, coupled with the complex history of apartheid education, it demands an intensive strategy for change and implementation. From this study, it is clear, that for OBE to be implemented, the staff and all the school's stakeholders need to have the necessary skills and support to ensure its success.

The analysis of the data collected in this study reveal the following:

- the schools, especially poor rural schools, experience a multitude of difficulties that inhibit them from being able to effectively manage curriculum changes;
- training and support for the implementation of OBE, both from the DoE as well as various other organisations, did not take these difficulties into serious consideration, or the need for the school to develop skills in other vital areas that will ultimately strengthen the implementation of OBE. In his paper "Why OBE will fail?", Jansen (1997:4-5) very eloquently states that:

“OBE is destined to fail in the Southern African education system because it is based on flawed assumptions of what happens inside schools, how classrooms are organised, and what kinds of teachers exist within the system. The policy requires not merely the application of a skill but understanding its theoretical underpinnings and demonstrating capacity to transfer such application and understanding across different contexts. Anyone who seriously believes that such an innovation will be ‘implemented’ with these original insights in mind has not spent enough time inside the average classroom.”

This quote not only sums up the complex nature of the South African education system, it also illustrates the difficulties in implementing policy. However, these difficulties should not be reasons to stop curriculum change. Rather, proper and well planned training programmes to assist teachers on the ground to implement these changes should be the focus. Furthermore, authorities must also realise that this will be a slow process and that the pace of these changes will also impact on the quality and success of the implementation;

- teachers felt more disempowered with the training that they received in OBE from DoE officials and other organisations because it did not fully address their needs and lack of skills;
- the atmosphere and general working relationship amongst staff and management played a significant role in the implementation of curriculum changes;
- after agreed upon organisational development interventions, mainly those of training and support, the staff gained tremendous confidence in their own abilities to implement OBE;
- after receiving training and support in other areas of management and team building, the staff felt that they were better equipped to work as a team to deliver the demands of curriculum changes; and

- compared to other schools in the region, schools that received training and support showed a better understanding of OBE and its implementation demands. Both the quality of teaching in the classroom as well as the physical appearance of the classrooms displayed their knowledge and skills in OBE.

The analysis of data in Chapter Four further illustrates that, for successful implementation of OBE, other key organisational development interventions need to be identified and developed with the whole school. Principals and School Management Teams need not only to change their management style to suit the demands of OBE; they also need to become skilled in OBE themselves so that they meet their support function for their staff. OBE demands a lot of team work and team planning and, without this component, the essence of OBE fails. Therefore it is crucial that staff receive training and support in this area as well as in managing conflict. In this way, they are equipped with skills and confidence to meet the demands of the new curriculum. Furthermore, rural schools that have had a history of neglect need more than just training courses to help them through. There should be an element of nurturing between the trainer and the staff as this gives the staff an improved sense of security in what they are learning and where they are heading. Of course this relationship must not border on dependency; it must still ensure that authentic development goals are reached in an authentic manner. It is also crucial that the School Governing Bodies are part of the broader picture and receive the necessary skills to ensure that they are able to contribute to the development of the school in a proactive way. They need to support the staff in implementing curriculum changes. This support can only be proactive when they have a clear understanding of the process too, and the demands it places on the school, the learners, and the community. Therefore, School Governing Bodies should be trained in, amongst others, aspects of team building, support structures and, conflict

management. In this way, support strategies for all partners in the school will be put in place. Schools also need far more support from the Circuit and District offices.

5.3. A STRATEGY FOR THE IMPLEMENTATION OF OBE

The researcher has outlined the problems experienced, especially by rural schools, with the implementation of OBE. The research shows that, with identified organisational development interventions, significant progress can be made even in the most under-resourced schools. Therefore the researcher believes that the process followed at this research site can be replicated so that more schools can have access to empowering training and support.

5.3.1. PROJECT DESIGN FOR A ONE YEAR INTERVENTION

From the experience gained in the case study, the researcher became convinced that OD interventions are pivotal in spearheading educational and institutional changes in South African schools. As revealed in these findings relevant OD interventions can have a noticeable impact on the management of the school and therefore on the quality of OBE. Thus the approach adopted by the researcher can be streamlined to provide guidelines for an OD intervention programme for anything between one and ten schools. The approach used in the case study by the researcher is fairly simple and therefore it should be possible to replicate it in other schools. This would afford more schools the opportunity to improve their quality of education and therefore help to achieve transformation in education.

To begin with, a skilled OD practitioner should be allocated to one or more schools, preferably schools that are within the same village and therefore fall under the same circuit. As the programme would be people focused, the OD practitioner should plan carefully (Morrison 1998:41). As outlined in Chapter Two (see paragraph 2.5.4.), it would also be important to divide the

interventions into phases and cycles so that it becomes easier to work with the schools and does not compromise the quality of the interventions.

Below are recommended phases. The researcher used the phases outlined by Schmuck and Runkel (1994) as a guide as well as the experience gained from this research.

Phase one: Start up

Here the practitioner should set up initial meetings with the staff and get a sense of the school and how it functions. The practitioner should spend time meeting staff, School Governing Bodies, and School Management Teams. The practitioner must also try to win the trust and confidence of the staff. Official documents should be studied and in-depth notes made in terms of perceptions and areas of concerns. During this phase, if the teachers are ready, the practitioner should also visit classroom lessons to gauge their understanding of OBE in the actual teaching and learning process. Every staff member should be interviewed at least once to gain an understanding of how s/he perceives that school, his/her knowledge of OBE, concerns and areas that need attention. From the findings, the practitioner should find patterns and common ideas. A presentation of the findings and how the practitioner sees a possible way forward should be conducted with all concerned at the school. From this presentation, the short and long term training and support programme and goals should be outlined and agreed upon by all (see paragraph 2.5.4 Phase one & two).

Phase two: Training

In this phase, the actual training will commence. Training programmes that are common can be conducted by combining schools. However, the practitioner must ensure that the number of staff participating in the courses remain reasonable. Furthermore, the practitioner must be sensitive to how the different schools are combined as these dynamics can impact on the training

programme. Some training programmes will also be best conducted with each school, like team building and conflict management.

In terms of OBE, the following should be done:

- a year plan with each school;
- discussions and specific training with phase teachers on methodology and assessment;
- classroom observation;
- support to teachers following classroom visits; and
- support to management.

General monitoring and discussions would continue in this phase. Apart from intensive OBE training, the other training and development needs will not be the same for all the schools. However, the following interventions should be part of the programme:

- conflict management;
- team building;
- strategic planning;
- management development, including financial administration;
- coaching and peer teacher assessment;
- basic school administration; and
- leadership

(see paragraph 2.5.4 Phase three).

Phase three: Support and Monitoring

This phase would only start effectively when the schools begin to show that they have reached a certain level of competence in phase two. Some indicators could be:

- Does the staff show a clear understanding of the requirements of OBE?
- Does management have a functioning monitoring and support structure and strategy in place? Do they demonstrate sound leadership?

- Does the School Governing Body have a sound understanding of their function and a strategy to support their teachers?
- Do the teachers demonstrate their ability to implement OBE in the classroom?
- Do the teachers demonstrate their ability to assess according to OBE methods?

In Phase three, the practitioner would continue with re-training in identified areas, monitoring, and support. However, this would be less intense compared with Phases one and two.

The practitioner would be available to assist in problem areas and, together with the staff, set up strategies for the school to find a way to be more self sufficient. For example, electing a suitable member of staff who is tasked with assisting other teachers. The practitioner, with the permission of staff from all schools, could also set up committees where staff from the schools on the programme meet regularly to discuss, debate, and support each other. They could use these forums to find constructive ways to share resources, ideas, and strengths. In this manner, the schools in the area would all be developing at more or less the same pace and all schools would be offering more or less the same quality and standard of education (see paragraph 2.5.4: Phase 4).

Phase four: Ending

In this phase, practitioners should be rounding up their work at the schools and prepare to leave the school. This is not a total withdrawal but the support from the practitioner should be minimal and at the request of the school. In this phase, a research and evaluation by an independent party should be conducted to measure the impact of the interventions. Areas that need strengthening should be identified for further interventions. It is recommended to include action research into this phase. These schools should then become part of a

broader programme where new policies and ideas, problems and support are discussed in general meetings.

The above is merely a framework that could be used to ensure that schools are sufficiently empowered to implement OBE. The time spent on each phase will also differ from school to school as this hinges on the issues prevalent in the school as well as the levels of understanding and knowledge of OBE amongst the staff (see paragraph 2.5.4. Phases five & six).

5.4. FURTHER RECOMMENDATIONS

Apart from the above guideline for a holistic development approach to curriculum changes and OBE, the following recommendations could be highlighted:

- the DoE should ensure thorough and high quality training to officials who are expected to train others (see paragraph 4.2.1.);
- the DoE should also play a significant quality assurance role or outsource this task to another organisation, so that all organisations providing curriculum training to schools adhere to high quality training that follows the specific policies of the National DoE (see paragraph 4.2.5);
- officials should guard against setting unrealistic time frames and expectations. Officials must be aware of the impact of change on an institution and the demands it places on individuals and institutions. Cognisance of the staff's need to understand, adjust and find ways to cope with the demands of the new curriculum should be taken into consideration (see paragraph 4.2.5. & 2.6.2.3.);
- the DoE and non-government organisations that are directly involved in curriculum delivery should address the lack of resources in schools. Basic classroom requirements for the implementation of OBE, for example, and copies of official documents and policies must be distributed to all schools (see paragraph 4.2.5.);

- for authentic curriculum change to be made and sustained, commitment is needed from all teachers and officials. All who are involved in curriculum training and delivery must be aware of this and find ways to ensure that this commitment is nurtured (see paragraph 4.4.2.); and
- introducing other policies that disturb the morale of teachers when they are required to be change agents is not beneficial to the process. Although this point does not feature directly in the study itself, it was eloquently stated by Darling-Hammond (see paragraph 1.2.).

5.5. LIMITATIONS OF THE STUDY

Purposive sampling was used. The context of this study was located in rural Limpopo. It would be ideal to have a school with different dynamics and socio-economic profile to participate in a similar study to compare the findings. Other information rich participants may have been overlooked and excluded from this study. Due to financial constraints experienced by the organisation (the employer of the researcher), it was not possible to extend this study either for a longer time period or to other schools. Furthermore, other organisational development training (for example, financial management) identified as important was not conducted due to these financial constraints.

As this was a dissertation of limited scope, restrictions on the length of the study had to be adhered to.

The researcher played many roles during this study (researcher, change agent, and trainer) and although strategies were implemented to improve objectivity, the researcher's bias probably had an impact on the study as a whole.

The research was a case study; as such the intention was not to generalise. Therefore its findings and recommendations may not be readily applicable to other schools (De Vos et al 1998:101).

5.6. STRENGTHS OF THE STUDY

This research was conducted during the implementation of OBE in secondary schools (2001). There were many discussions on the viability of the cascade model as the key method of training teachers to meet the demands of the new curriculum. This study showed that an alternative OD method can be employed, and that OD can improve the chances of success. The study was conducted in a rural school that displayed all the shortcomings prevalent in rural schools and yet it revealed that the school, with its limited resources, was able to achieve a measure of success in implementing OBE. This could mean that all schools have the potential to achieve this success.

5.7. CONCLUSION

The focus of this study was on the importance of OD interventions for the successful implementation of OBE. The nature of OD and its impact on institutional development, in particular curriculum changes and development in schools have been considered and discussed. The study has revealed that the implementation of OBE in South Africa is a complex and demanding process and therefore strategies employed for the implementation need to understand and address this very complexity. Suggestions were offered to guide any further implementation of curriculum changes that could be used by schools, non-government organisations and the DoE. Apart from the training and support suggested in this study, schools need ongoing support, dialogue and information to ensure the successful and sustainable development of the South African education system, and therefore South Africans themselves.

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APPENDIX ONE

Questionnaire to assess teacher's baseline knowledge.

1. Describe the National Qualifications Framework (NQF) and explain its role in the new education system

2. What is your understanding of the following concepts:
 - OBE?
 - Curriculum 2005?

3. Do you have a copy of the policy documents relevant to the grades you are teaching? If not, have you looked through a policy document at any point?

4. Are you able to change your approach to learning and teaching by interpreting and applying the new education policy? If yes, in what way?

5. What is a learning programme?

6. What do you understand by the term group work?

7. In your own words describe at least 2 critical outcomes.

8. How is OBE managed at your school?

9. Are you coping with the demands of the new curriculum?

APPENDIX TWO

Interview questions: Cluster coordinator of the Sacred Heart College Research and Development Unit.

Q: What was your role in the Presidential School's Project?

A: I was one of the project coordinator's responsible for one cluster.

Q: What were the challenges that you faced?

A: The management was quite weak. There was no management structure. The principal was often not there. The school still functioned quite properly but mainly because the teachers took the initiative. They ran the school on a daily basis, did their teaching and tried to support each other. It became quite hard for them, yet they never really complained. They were tired, they were not the strongest, but they did things within their abilities. But the lack of management made it quite a challenge.

Q: How key was the OD interventions, i.e., the management, team building, support visits to the changes in curriculum delivery experienced in these schools?

A: I really think that a dramatic change like that demanded of OBE one cannot look at only one aspect of a school's development. It is a complete change so if the management style is still 'old fashioned' then you will run into trouble because schools and the management structures are not ready for it. It demands a completely different culture and the school culture is a managerial responsibility.

Q: Can you give some examples that you experienced in your cluster?

A: In my cluster we had a strong focus on team preparations and overall planning for the coming weeks. This was one of their strengths in that they were able to get themselves together and plan and work according to that plan. That school was running as a team. Although I could not say that there was a

definite change, but the school ran as a team and that made a big difference. For OBE team work is very important . One's whole attitude has to change.

Q: According to the reports and research report written by Joint Education Trust, not all the schools progressed at the same desired rate. Could you comment on this?

A: The overall plan had a generic structure on how the schools should progress. All the schools on the project were so diverse and their circumstances so diverse that progress could not happen at the same desired rate. I think that we desired a bit too much.

Q: What characteristics did a school that progressed well display?

A: There were two clusters that worked pretty close to what we hoped to achieve. They had a fully functioning management and school governing structures and they were all behind the delivery of the project. The fact that the School Management Team and the School Governing Body were supporting the goals made a big difference to the development of the school. There was also no tension between these two bodies. For example, in one of the clusters the teachers who were more involved in the project were given a lower teaching load so that they would have more time to work on the project. The school ran as one unit. On a curriculum level there are many examples of how teachers really tried to get into grips with OBE. One example that stands out for me is the one teacher who used newspapers and motivated others to find creative ways to develop OBE lessons.

Q: How soon into the programme did you begin to notice that positive changes were taking place?

A: On cluster level it was different at different schools. At the presidential schools it went quite fast although each school sort of followed its own path. What was noticeable was that when we worked in the Presidential schools only, changes could be seen quite quickly. As soon as the cascade programme was

introduced for the surrounding schools that pace of change and progress slowed down.

Q: Was there any comparisons done with other schools in the area that did not receive any training from you to determine the success rate of the programme? If so what did the comparison show.

A: Well not really but the high school principal in the cluster that I worked in noticed a difference. He noticed that the learners who come from the schools that were on the programme were able to work in groups and work on their own. They were more independent than the children who came from other schools. But this was just his observation. There was no formal comparison done.

Q: According to the JET report, in 1999 alone 42 curriculum related support visits were made to the school. Can you give us more insight into the impact these visits had on the overall progress of the schools?

A: The general feeling with the staff was that someone was concerned about them and their progress. That made a huge difference. Even if one did not do anything during these visits, that fact that you were there, that they could speak to you, made an impact on the school. These support visits made them feel part of the programme.

Q: The Presidential Schools were on the project for two and a half years. Would you say that this was sufficient time to bring about the desired changes in the school?

A: Not sufficient. But it reached a good level in this time period. Lets say that the Presidential Schools reached a level where I would feel comfortable to send my own kid to the school.

Q: In Phase two of the project, the cascade model was used where the host school elected a cluster coordinator to support 6 other schools in the area. How successful was this cascade model in this project?

A: It has done tremendous change but it is a lot more difficult to pinpoint. But the programme was definitely watered down. But I am not against the cascade model as long as one has a clear idea of what one wants and does not expect to get the same results as one would in a direct contact programme.

Q: In your opinion and experience do you think OBE can be successfully implemented without any Organisation Development programmes being offered to the school simultaneously?

A: No. It's just so important for the general attitude change. One cannot expect change if all are not on board. It's either everyone at the school or no-one. OD is critical for the successful implementation of OBE.

Q: What did you enjoy most being the Project coordinator?

A: To work in a far out rural school and to still see so many positive impressive changes happening.