

**New Assessment Methods in
Business Studies
in
the FET Phase**

by

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SUPERVISOR: PROF F.E. GOUWS

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Preface

DECLARATION

"I declare that NEW ASSESSMENT METHODS IN BUSINESS STUDIES IN THE FET PHASE 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."

.....

Mrs. Y. Russell

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DEGREE: **MASTER OF EDUCATION (Didactics - DIS699E)**

DEPARTMENT: **DIDACTICS**

UNIVERSITY: **UNIVERSITY OF SOUTH AFRICA**

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SUMMARY

Assessment methods in Business Studies in the FET phase have had to change as a result of the implementation of OBE and the NSC in South Africa. In order to analyse how this has affected the education of learners, a case study, based on the IEB was analysed.

Under the supervision of Umalusi, the IEB has developed new moderation systems in order to quality assure SBA (School Based Assessment), represented by learners' portfolios which constitute 25% of the final promotion mark for the NSC. The guidelines and documentation for these moderation requirements are contained in the IEB Business Studies SAG (Subject Assessment Guidelines). This document forms the basis of the case study.

The IEB, however, does not work in isolation and through their partnership with the DoE the experience gained through implementing new assessment methods in Business Studies as described in this study can be adapted for other subjects or schools in the public sector.

KEY TERMS:

Assessment, Business Studies, Further Education and Training, IEB, Multiple Intelligences, Multiple Intelligence Theory, National Senior Certificate, National Curriculum Statement, Outcomes-based Education in South Africa, Portfolios, School Based Assessment

Table of Contents

Preface	ii
DECLARATION	iii
Table of Contents	vi
Table of Figures	xii
Table of Tables.....	xii
List of Appendices.....	xiii
ACKNOWLEDGEMENTS	xiv
List of Acronyms.....	xvi
Chapter 1 - Introduction.....	1
1.1 Introduction	2
1.2 Awareness of the Problem	3
1.2.1 General Awareness.....	3
1.2.2 Personal Awareness.....	4
1.3 Exploration and Formulation of the Problem:	6
1.4 Statement of the Research Problem	7
1.5 Aims of the Study	8
1.5.1 Specific Aim	8
1.5.2 Indirect Aims.....	8
1.6 Definition of Concepts.....	9
1.7 Methods of Research	10

1.8 Research Programme.....	11
Chapter Two - Business Studies in the FET Phase	13
2.1 Introduction.....	14
2.2 OBE as an Educational System	15
2.2.1 Principles of OBE	15
2.2.2 International Development of OBE	18
2.2.3 OBE in South Africa	19
2.2.4 Curriculum 2005 (C2005)	23
2.2.5 Organisations Underpinning Assessment in SA.....	25
2.2.6 OBE Terminology.....	28
2.2.7 Summary of the Major Changes.....	30
2.3 The FET Phase	32
2.3.1 Problems Specific to the FET Phase	34
2.3.2 The Importance of the FET Phase.....	36
2.3.3 Future Development of the FET Phase	36
2.4 The effect of OBE on Business Studies as a Subject.....	37
2.4.1 Previous Dispensation – Business Economics	37
2.4.2 New Dispensation - Business Studies	39
2.5 The Business Studies Learner in the FET.....	42
2.5.1 Changing Learner Profiles in General	42
2.5.2 Changing Learner Profiles in Business Studies	43
2.5.3 Grade 12 Learners of 2008	44

2.5.4 Influence of South African Labour Law on Learners	45
2.6 Conclusion	49
Chapter 3 - Assessment in Outcomes-based Education and the IEB	51
3.1 Introduction	52
3.2 The History of Assessment in Education.....	53
3.2.1 Home Schooling	54
3.2.2 The Birth of Formal Education and Assessment	55
3.2.3 Industrial Revolution.....	56
3.2.4 World Wars	56
3.2.5 Post 1945 – pre-OBE Education Internationally	57
3.2.6 Post 1945 – pre-OBE Education in South Africa	57
3.2.7 Outcomes-based Education (OBE).....	59
3.3 The Concept of Assessment in Outcomes-based Education	60
3.3.1 Assessment FOR Learning.....	61
3.3.2 Assessment Practice in South Africa	62
3.3.3 Dangers of Ineffective Assessment Practice.....	62
3.3.4 Assessment for Individual Learners	63
3.3.5 Ethical Considerations in Education	81
3.4 The Role of the IEB in South African Education and Assessment.....	83
3.4.1 Brief History of the IEB	83
3.4.2 Current Position of IEB.....	86
3.4.3 Contribution of the IEB to Assessment in SA.....	87

3.4.4 Quality Assurance of the IEB.....	88
3.4.5 The IEB Going Forward	89
3.5 Conclusion	91
Chapter 4 - School Based Assessment in Business Studies.....	93
4.1 Introduction	94
4.2 Research Design.....	95
4.2.1 Research Question.....	95
4.2.2 Research Design	96
4.3 School Based Assessment (SBA).....	99
4.3.1 Introduction	99
4.3.2 Evidence of SBA.....	101
4.3.3 Reasoning for the Introduction of Portfolios.....	104
4.4 The Role of the Educator in Portfolio Assessment.....	107
4.4.1 The Educator as Assessor	107
4.4.2 Assessor Training	108
4.4.3 Time Pressures Around Assessing	109
4.4.4 Staff Morale.....	111
4.5 Assessment Issues.....	111
4.5.1 Types of SBA	112
4.5.2 Syllabus versus Curriculum	113
4.5.3 Assessment Methods	114
4.5.4 Assessment Tools.....	115

4.5.5 Assessment Resources	115
4.5.6 Assessment Materials	116
4.5.7 Other Assessment Issues.....	117
4.6 Conclusion	120
Chapter 5 - Empirical Research: Case Study - Business Studies Portfolio Moderation in the IEB.....	121
5.1 Introduction.....	122
5.2 Time-line: Preparation for First NSC Examination - 2008.....	123
5.2.1 Early Business Economics Portfolio Moderation	124
5.2.2 Business Studies Portfolios	125
5.3 IEB Supporting Structures	126
5.3.1 Assessment Specialists.....	127
5.3.2 Examination Panels	127
5.3.3 Cluster Groups.....	127
5.3.4 Regional Groups.....	128
5.3.5 National Subject Forums (NSF).....	128
5.3.6 Annual National Conferences.....	128
5.4 IEB Processes for Introduction of OBE	129
5.4.1 Core Skills Testing.....	129
5.4.2 International Benchmarking Tests in English, Mathematics and Science. 129	
5.4.3 Exemplars	129
5.4.4 Educator Training	132
5.4.5 Subject Assessment Guidelines (SAG)	134

5.5 Quality Assurance (QA) 137

5.6 Moderation..... 138

 5.6.1 Moderation Requirements 138

 5.6.2 Assessment Principles 139

 5.6.3 Moderation Structures..... 142

5.7 Summary of Researcher’s Role in the Process..... 147

5.8 Conclusion 150

Chapter 6 - Summary, Conclusions and Reference List 152

6.1 Introduction 153

6.2 Purpose of the Research..... 154

6.3 Methods of Research 154

 6.3.1 Literature Study 154

 6.3.2 The Empirical Study..... 155

6.4 Results of the Literature and Empirical Studies 157

6.5 Limitations of this Research..... 162

6.6 Recommendations for Further Research 163

 6.6.1 Recommendations Specific to Business Studies..... 163

 6.6.2 Recommendations for the FET Band..... 164

6.7 Conclusion 166

Reference List 169

 Website Reference List 179

Appendices A -D..... 185

Table of Figures

Figure 2.1: Factors affecting Business Studies as a subject, as well as the Business Studies learner.....	14
Figure 2.2 Map of the world – land area.....	21
Figure 2.3 Map adjusted to show the relative number of learners enrolled for Secondary education.....	22
Figure 2.4: Structure of the NQF.....	26
Figure 2.5 Growth in number of candidates for Business Economics in the IEB (2001 – 2005).	39
Figure 3.1 Aspects of Assessment discussed in chapter three.....	53
Figure 3.2 SMART Technology in the classroom.....	79
Figure 3.3 MIMIO Technology in the classroom.....	80
Figure 4.1 The interaction of the three assessment variables in FET teaching.....	95
Figure 5.1 The Three main phases of transition towards the implementation of OBE and the first NSC examination in 2008.....	122
Figure 5.2 Format showing the supporting structures of the IEB.....	126

Table of Tables

Table 2.1 The objectives of the National Qualifications Framework.....	27
Table 2.2 Key functions of Umalusi.....	28
Table 2.3 Fundamental terminology changes.....	29
Table 2.4 OBE Levels of Achievement.....	31
Table 2.5 Critical and developmental outcomes.....	33
Table 2.6 Differences between Employment Equity and Black Economic Empowerment.....	46
Table 4.1 IEB Business Studies Portfolio Requirements (2008).....	102
Table 5.1 Time-line for Introduction of Portfolio Moderation at Grade 12 Level... ..	124
Table 5.2: Summary of Researcher’s Roles in Business Studies.....	148

List of Appendices

Appendix A Summary of National Curriculum Statement for Business Studies.....A1
Appendix B Subject Assessment Guidelines for Business Studies.....B1
Appendix C Business Studies Portfolio Moderator's Report 2007.....C1
Appendix D Letters of Permission.....D1

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**without your loving support and encouragement I
would not have come this far.**

List of Acronyms

ABET	Adult Basic Education and Training
AIDS	Acquired Immune Deficiency Syndrome
ANC	African National Congress
AS	Assessment Standard
BBEE	
BBEE	Broad Based Black Economic Empowerment
BC	Before Christ
BCEA	Basic Conditions of Employment Act
B.Comm	Bachelor of Commerce
BCVO	Beweging vir Christelike Volkseie Onderwys
BEE	Black Economic Empowerment
C2005	
C2005	Curriculum 2005
CEO	Chief Executive Officer
CIA	Classical Item Analysis
CMC	Curriculum Management Committee
CO	Critical Outcomes
CRM	Cluster Report Manager
CSI	Corporate Social Investment

New Assessment Methods in Business Studies in the FET Phase

DO	Developmental Outcomes
DoE	Department of Education
DSSS	Direct Sequence Spread Spectrum
DVD	Digital Versatile Disc or Digital Video Disc
EE	Employment Equity
ETDP	Education, Training and Development Practices
FET	Further Education and Training
GET	General Education and Training
HET	Higher Education and Training
HG	Higher Grade
HIV	Human Immunodeficiency Virus
HOT	Higher Order Thinking
IAEA	International Association for Educational Assessment
ICDL	International Computer Driver's Licence
IEB	IEB – official name of independent assessment body under Umalusi
IPEC	Inter-Provincial Examinations Committee
IQAA	Independent Quality Assurance Agency
ISASA	Independent Schools Association Of South Africa

New Assessment Methods in Business Studies in the FET Phase

JMB	Joint Matriculation Board (now extinct)
KZN	Kwazulu Natal
LO	Learning Outcome
LOT	Lower Order Thinking
LPG	Learning Programme Guidelines
LSEN	Learners with Special Educational Needs
LTSM	Learning and Teaching Support Materials
MI	Multiple Intelligences
MIT	Multiple Intelligence Theory
NCS	National Curriculum Statement
NQF	National Qualifications Framework
NSC	National Senior Certificate
NSF	National Subject Forum
OBE	Outcomes-Based Education
PDI	Previously Disadvantaged Individual
QA	Quality Assurance
QCA	Qualifications and Curriculum Authority (England)

New Assessment Methods in Business Studies in the FET Phase

RPL	Recognition of Prior Learning
SA	South Africa
SAFCERT	South African Certification Council (now extinct)
SAG	Subject Assessment Guideline
SAQA	South African Qualifications Authority
SASA	South African Schools Act
SBA	School Based Assessment
SDA	Skills Development Act
SETA	Sector Education and Training Authority
SG	Standard Grade
SKAV	Skills, Knowledge, Attitudes and Values
SMS	Short Message Service (<i>or send via Short Message Service</i>)
TED	Transvaal Education Department (now extinct)
UK	United Kingdom
USA	United States of America

Chapter 1 - Introduction

1.1 Introduction

South Africa is in the throes of the most drastic education curriculum change in modern history. Following the trend of 167 countries world-wide (Swart 2007) in introducing Outcomes-based Education - the brainchild of William Spady - the education system is, at last, attempting to produce learners who are better equipped to cope with the demands of modern economies (Spady 1993:1). Aspects such as globalisation, population explosions, the threat to our natural resources and the increased pressures brought on by rapid technological change have caused an urgent need for a totally different set of skills and mindsets to be taught to learners at school level.

Job tenure, stability, one-country, one-career living are becoming outdated concepts, and the old syllabus-based educational system which drummed in knowledge and valued a time-based work ethic is no longer adequately preparing our learners for either tertiary study or the world of work.

The OBE approach differs from past education systems in that the focus has shifted away from a factually-based syllabus, to a SKAV-(Skills, Knowledge, Attitudes and Values) based curriculum which is much broader.

In some subjects, the change has not only necessitated a new curriculum, but also a paradigm shift in approach which has resulted in a name-change: for example, Business Economics - which is now, under OBE - following the world wide trend of being known as Business Studies. As a subject it now includes a far broader view of the business world including non-economic aspects such as ethics, team dynamics and creative problem solving (DoE 2003a:9).

Within the FET, one of the greatest paradigm shifts has been from a purely examination-based exit point in grade 12, to the inclusion of SBA (School Based Assessments) in the form of portfolios (IEB 2008a:2). This has necessitated a far more rigorous approach to classroom based assessments and the need for quality assurance of tasks. It has made it possible for a subject like Business Studies to move away from a totally theoretical premise to the inclusion of practical skills, simulation and case-study based assessments.

These provide the opportunity to expose learners to real life situations where they have to make decisions which test not only their knowledge, but also their attitudes and values in response to specific situations.

It is necessary to note that not only schools, but tertiary institutions and work-based training have also, by law, had to embrace the OBE approach, so that the transparency of the process, as well as the transportability of the learning becomes a universal process. Another new concept which has been introduced is **RPL** – Recognition of Prior Learning, which acknowledges that there is more than one avenue to gain access to any particular OBE level of education. Because exit points are based on the achievement of outcomes, it is possible, for someone with practical experience to apply for RPL and do a test to prove that they can achieve those outcomes without having followed the traditional theoretical route of study.

Within this research, the focus will be on looking at assessment within the FET (Further Education and Training) band, which is the exit level for school education, and a vital link between schooling and the outside world. More specifically, it will look at how the **IEB** has addressed these issues, although a lot of work and planning is done in consultation with the **DoE** (Department of Education) and UMALUSI (IEB 2008d: 7).

1.2 Awareness of the Problem

1.2.1 General Awareness

All Educators who were trained under the old dispensation had to undergo retraining through a process of seminars and information sessions on OBE in order to prepare for the new system. As it was initially introduced in the lower grades, high school Educators - especially those in the FET - were less affected, and very few adaptations were initially made in these phases. A few forward-thinking trainers and examiners started using rubrics; portfolios were slowly introduced on a trial basis and exemplars of skills-based projects were emailed and distributed as the new way to go. But in many ways, there was a prevalent attitude of “sticking plasters over broken bones”.

Three major issues contributed to this problem:

- The information that Educators were getting was piecemeal and uncoordinated – bits of information that seemed like pieces of a giant puzzle which just did not seem to fit anywhere. In 2005, when the 2008 grade 12s were choosing their subjects, there was still no clarity regarding university entry requirements around specific questions such as the value of Mathematical Literacy.
- Secondly, the media was having a field day. Not knowing whether to blame the Apartheid government or the new dispensation, they criticised every step of the transformation and reported only on the bad – never the positive. They zoned in on negative stories and literally created mass-hysteria with both parents and the public at large. Even today (2008) with the first grade 12 group writing their exit-level examinations, there are few, if any, journalists with a true understanding of the process reporting on it from an education perspective.
- Lastly, schools were crisis-managing; trying to keep up with the increasing demands of the examination boards and losing experienced staff who could not cope. The result was that they were not planning ahead adequately for the future requirements. Today, many schools are still reaping the unfortunate results of that lack of foresight. The government's 2004 aim to have all Educators assessor-trained came and went without fanfare, even in many of the IEB schools.

1.2.2 Personal Awareness

In 2002 the researcher was **cluster leader** (groups of five or six IEB schools in a geographic area) that work together in each subject (King & Van Den Berg 1993:203), and in 2003 was elected as Gauteng Regional Coordinator (all Gauteng cluster groups).

In 2005 the researcher was approached by the IEB to apply as **portfolio moderator** for Business Economics, a role which, together with the examiners and internal moderator, forms the examining panel which is appointed for a three year cycle (2006 – 2008). Portfolios in Business Economics were in their second year of being compulsory and there was great confusion and angst amongst Educators, hence the fact that there had been no applications for the post. The IEB requires their examiners to do all three OBE assessment courses:

- Assessors course for Educators (Unit Standard 115753 – 15 credits)
- Design and Develop Outcomes-Based Assessment (Unit Standard 115755 – 10 credits) course
- Moderation in Education (Unit Standard 115759 – 10 credits) – **researcher** currently completing portfolio component of this course

Completing these courses and the training received on the many conferences that the IEB hosts for their examiners have contributed to the researchers understanding of and contribution to the process of OBE at the FET level.

Currently, OBE is no longer an aspect of choice. Those educational institutions, who do not embrace it, face dire consequences. Schools are being pressurised into compliance by the examining bodies and non-compliant tertiary institutions have been closed down by the government.

OBE however is not without its problems. In chapter four some of the challenges and obstacles that need to be overcome in the process of converting an entire multi-lingual, politically volatile country with a legacy of socio-economic problems to a new education system are discussed. This research seeks to contribute by documenting one case study where there has been a measure of success, as it is on the accomplishment of individual successes that the building of future plans and processes rests. The conversion to OBE is onerous enough within itself and it is only by cross-pollination of ideas and the sharing of documentation and resources that it will be possible to move forward.

The partnership between the DoE and the IEB leads the way in this – if they can build together at a systemic level, it is up to the schools and Educators to follow suit and join hands at the ground level where the daily challenges are being faced.

1.3 Exploration and Formulation of the Problem:

In order to explore the problem it is necessary to look at:

How portfolio moderation is done and quality assured in order to assess the School Based Assessment of learners in the IEB writing Business Studies as an FET exit level subject, based on the requirements of the NCS, Umalusi and the IEB.

As the portfolio counts 25% of the final grade 12 promotion mark, it is imperative that this component is of an acceptable standard and comparable to the standards of other schools and other learners at the same level. The portfolio has a dual impact on the learners' futures:

- Career, tertiary study and employment decisions are based on the promotion mark;
- The skills and techniques learnt and practised in the portfolio tasks lay the essential groundwork for the grade 12 exit examinations.

All educational institutions are required to comply with the new regulations; work up to the required standards and teach their learners the skills, knowledge, attitudes and values (SKAV's) that underpin the new OBE curriculum. Schools that are not doing this are predisposing their learners to failure, both in the grade 12 examinations and any tertiary studies they may undertake.

In summary, this research aims to document the case study of the IEB, and how this problem has specifically been addressed within Business Studies as a subject.

1.4 Statement of the Research Problem

With the introduction of the OBE system and its associated 25% portfolio component which is based on SBA, it has been necessary to change both the mindset of Educators; and the guidelines and requirements provided by the Assessment Bodies. This research seeks to analyse how this process was managed by the IEB in Business Studies as a representative subject.

In order to analyse the implementation of the Business Studies portfolios, with the associated moderation and quality assurance procedures, it is necessary to look at various aspects in more detail:

- 1.4.1** The concept of FET and its role within the OBE system, particularly as it pertains to Business Studies as a subject and the learners who choose it as one of their seven grade 12 subjects.
- 1.4.2** The role of assessment in OBE and how it has changed over the years from an informal phenomenon to one in the current system which is specific, targeted and integral to the learners' growth and development.
- 1.4.3** The integration of such aspects as globalisation, cultural issues within education, ethical considerations and the use of technology within assessment.
- 1.4.4** The issues which are both enhancing and inhibiting the successful implementation of the OBE system with specific reference to issues around the assessments, SBA and the assessors who implement it.
- 1.4.5** The role of the IEB within the South African educational context and its relationship and interaction with the DoE, Umalusi and SAQA. It is also necessary to look at the timeframes within which the transition to OBE had to be made within South Africa: from the initial announcement by Professor Bengu (Minister of Education at the time) in 1997 (Le Grange 2007:79) to the first grade 12 NSC examination in 2008.

1.5 Aims of the Study

By means of both a literature study and a case study, this research will aim to achieve the following:

1.5.1 Specific Aim

To do qualitative research design on Business Studies in the IEB and record the assessment processes, moderation procedures, documentation and quality control measures that have been instituted in order to comply with the Umalusi requirements.

1.5.2 Indirect Aims

The following indirect aims are also part of this research:

- To look at how assessment has changed across the two education systems from Business Economics in the old, to Business Studies in the new by means of a literature research.
- To look at the theory of SBA (School Based Assessment), by means of a literature research.
- To look at the opportunities for the future – what Business Studies can bring to the table for learners in respect of life skills as well as preparation for both tertiary study and the world of work by means of analysing the case study.
- To look at documenting the successes that have been achieved, and to contribute those procedures and documents which are working well to the greater body of knowledge, both within other subjects in the IEB, and Business Studies within the DoE. Neither Business Studies as a subject, nor the IEB as an assessment body is working in isolation, so any advancements or successes experienced is shared with other subjects and assessment bodies to enable the process to roll out faster and more smoothly.

1.6 Definition of Concepts

OBE is littered with terminology and the redefinition of terms. The following terminology which is used in this research is explained in order to facilitate understanding of the concepts. Not all acronyms have been included, as these are listed separately after the index.

- **Outcomes-based Education**, as developed by William Spady, is an education system whereby outcomes are preset (Spady 1993:4) and tasks designed to allow learners the opportunity to achieve those outcomes.
- Within this research, the emphasis is on the **FET (Further Education and Training) phase** which incorporates grades ten to twelve where there is a NCS (National Curriculum Statement) for each subject. This NCS defines the broader LOs (Learning Outcomes) for the subject, and each of these are divided into a number of ASs (Assessment Standards) which provide the various skills, knowledge, attitudes and values which the learner needs to acquire in order to achieve the said outcomes. On achieving this for a total of seven subjects, the learner can attain the NSC (National Senior Certificate) which is the exit-level qualification for the FET.
- **Business Studies** is one of 29 FET subjects and falls within the group of commercial subjects known in OBE as Economic and Management Sciences (EMS). At the GET and lower levels, learners study EMS to get a commercial grounding, but at FET level they can do any combination of Accounting, Business Studies and Economics as part of their choice subjects.
- **The IEB** is one of only two independent assessment bodies accredited by Umalusi for assessing within Southern Africa at the FET level. All other assessment bodies fall under the DoE (Department of Education). The IEB has member schools in other countries such as Namibia, Mozambique and Botswana.

- **Assessment** is the central theme around which this research is based: it is the evaluation and judgments made on learners' performances in a variety of tasks, in order to record and report on their achievements.
- **Portfolios** are the evidence of assessment – a collection of learners' work which is based on pre-set criteria in order to represent the SBA (School Based Assessment) which has occurred during a specific period of time. At the FET level, portfolios currently (2008) constitute 25% of the final promotion mark, with the remaining 75% being obtained from the final examinations.

1.7 Methods of Research

As discussed in section 1.5 this research will constitute qualitative research on Business Studies portfolio moderation in the IEB and a literature study of the underlying concepts.

- **The Literature Study** aims to clarify concepts and looks primarily at publications (books, journals and articles) which explore the concept of OBE both in its basic premise and how it has been implemented in other countries. As OBE is a live and developing concept which is changing daily, the literature study has also included several recent conferences and the conference papers on current research which is being done world-wide.
- **The Researcher** has looked at the moderation procedures that the IEB has instituted for the portfolios in Business Studies as a subject. This includes all aspects of moderation: school, cluster, regional and national moderation. It is classified as qualitative research as it is a case study of a non-contrived situation and a literature study with specific procedures identified *during* the research to explain the situation (McMillan 1993: 37).

1.8 Research Programme

The division of the chapters will be as follows:

In chapter one, the main aim of this research has been introduced, and an introduction to the various aspects of the study to follow has been provided.

The background to the introduction of OBE as an education system, as well as the effect that it has had on Business Studies, is the focus of chapter two. The cumulative effect of these changes on the learner is discussed in detail as OBE aims to take cognizance of the abilities, strengths, culture and language of each learner in order to make learning accessible to each individual.

Chapter three continues with the literature study which explores the development of assessment through the ages, as well as the changes which have been required both nationally and internationally by education institutions in order to accommodate the new assessment requirements. It goes on to document a brief history of the IEB and the crucial role which it plays in the current education climate in South Africa. The IEB does not only impact the schools that are registered with them, but - through its partnership with the DoE and Umalusi, other schools as well. This impact is through leading assessment practice and policy as well as assessing marginalised subjects and languages across the spectrum of private and public schools alike.

The concept of SBA which is playing an increasingly important role in the promotional requirements at FET level is discussed in chapter four. The IEBs philosophy on portfolios and the moderation of them to ensure acceptable standards of assessment is analysed in detail. This includes a recording of both the processes and supporting structures which are put in place by the IEB to maintain this process.

A case study, which addresses the specific Subject Assessment Guidelines (SAGs) and their implementation, constitutes the body of chapter five. For ease of reference, the lengthy document is colour-coded and appended in Appendix 2 with cross-referencing to the text in the chapter.

Chapter six will conclude with a discussion on the current position and a summary of the findings from this research. It will also look at possible future studies and highlight areas where more emphasis needs to be placed.

**Chapter Two - Business Studies
in the FET Phase**

2.1 Introduction

The focus of this chapter will be on analysing the characteristics of OBE (outcomes-based education) as an assessment system, as conceptualised by Spady (1993: 1), as well as looking at the structure of the FET phase in general, with the role of Business Studies as a subject in particular. In so doing it is necessary to look at the demands of the subject at present, and the challenges that have arisen due both to the changes within the subject, as well as the changing profile of learners choosing it in the FET phase.

The changes from an Educator-centred, segregated, content-based educational system to a learner-centred, integrated, SKAV-based system have necessitated a radical change in Business Studies as a subject at the FET level (Topper 2006). Originally called Business Economics, and based on office management theory, Business Studies is now a dynamic and relevant curriculum that is teaching skills such as problem-solving, creative thinking and strategic management (Nel 2004).

Figure 2.1 below shows the relationships of both the FET and Business Studies as a subject with OBE as a dominant educational system, and the resultant impact on the learner who has had to change from the old to the new:

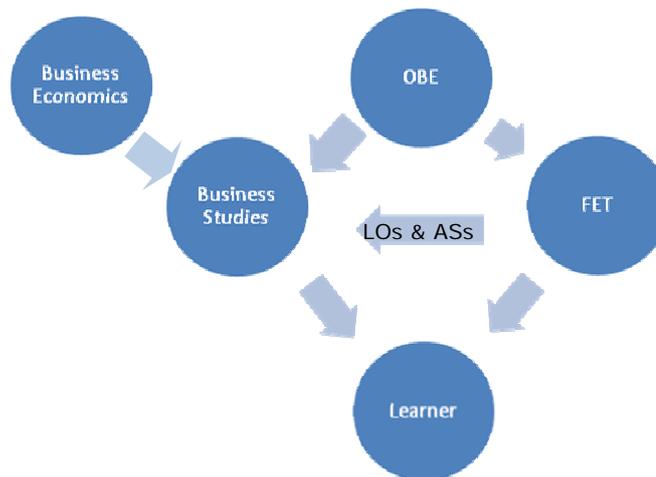


Figure 2.1: Factors affecting Business Studies as a subject, as well as the Business Studies learner

2.2 OBE as an Educational System

Spady (1993:6), acknowledged as the father of OBE, defines it as follows: "Outcomes-based education means to start with a framework and a set of expectations about the desired learning results". He goes on to say that the curriculum and organisational forms can then be built in order to give the learner the opportunity to achieve the desired results. These expectations are presented in the form of "outcomes", which Spady (1993:4) defines as "an actual demonstration in an authentic context". An important shift from the old view of education is that these outcomes are clearly defined and require the learner to attain a specified standard, rather than to stay at school for a predetermined number of years (Nel 2004). Johnstone (2008) explains why this is necessary when he quotes Alvin Toffler's comment: "... the illiterate of the 21st century will not be those who cannot read and write, but those who cannot learn, unlearn and relearn."

Spady is firmly of the opinion that, in order for OBE to be successful, the systems around it - at classroom, school and legislative level - have to undergo significant change (Spady in Van Niekerk & Killen 2000:93). Toddun (2000:23) emphasises the fact that such change must be pre-empted by a paradigm shift – which she quotes Dalin and Rust defining as "a major change in the way realities are thought about and explained". Spady (1993:10) goes as far as saying that this shift needs to be on a scale of transformational change in order to keep up with the rapid development in the world around us. In practical terms, this shift needs to be from Educator-centred teaching to learner-centred learning, driven by specified outcomes, not arbitrary assessment of tasks (Nel 2004).

2.2.1 Principles of OBE

It is important to note that there is no single, authoritative model for OBE, but rather a distinctive character of assessment that emerges when Educators apply the principles of OBE.

According to Spady (1993:32) these 'Power Principles of OBE' (which will be discussed briefly) are:

- i. Clarity of focus and defined outcomes
- ii. Expanded opportunity
- iii. High expectations
- iv. Design down

2.2.1.1 Clarity of Focus

If all educational action is going to be focused on outcomes, it is essential to ensure that outcomes of significance are formulated (Spady 1993:15) so that authentic assessment is achieved. Transparency is important here, so that the learner knows exactly what is expected and can aim for the achievement of that outcome. The pure assessment of content-based knowledge is now expanded by including other skills and aspects as designated by the outcomes (Gouws 2007:66).

2.2.1.2 Expanded Opportunity

Gouws (2007:66) refers to this broadening of the curriculum as 'Mastery of Learning', and supports Spady and Marshall's (1991:70) views which say that time should be used as a flexible resource, rather than a predetermined absolute. Toddun (2000:30) adds that learners should have multiple opportunities, with assistance, to achieve success, as individuals differing in their abilities will need different time frames (and different degrees of assistance) for learning. This is probably the biggest mind-shift for South African Educators, and something which currently – 2008 - is not yet a reality, with our school systems not yet flexible enough to accommodate this shift in differentiating classes.

2.2.1.3 High Expectations

At its very basis, the key OBE premises (Spady 1993:18) are:

“All students can learn and can succeed.

Success breeds success.

Schools control the conditions of success”

In order to achieve this, it is necessary to get rid of the ‘bell curve’ system of comparative and norm-based assessment (Spady 1993:18), and allow each learner multiple opportunities to attempt tasks and so achieve success by doing. McWilliams (2008), however, warns that with high expectations comes the necessity to give high support, and that it is necessary to adequately scaffold the learning in order to enable learners to achieve at these levels. Toddun (2000:29) refers to this as ‘success orientation’, but cautions that this needs to be supported by a positive learning environment. Mol (2008) confirms this emphasis on success, but goes further to say that true success means using your knowledge and skills to make a significant difference in the lives of others.

2.2.1.4 Design Down

This is the process of working backwards from the expected outcome, to design the assessment strategy that will allow the learner to achieve that outcome (Spady & Marshall 1991:70).

Along with relooking at the very concept of knowledge and its value to society (Willis & Drewell 2008), outcomes-based education propagates the notion that the traditional sources of educational information were too narrow, and new sources should be explored and engaged by the modern learner (SAQA 2000:3). This not only requires new and innovative approaches to teaching and learning but, very importantly, a new approach to the assessment of that learning.

2.2.2 International Development of OBE

How did OBE come to be? With the rapid development of technology and with globalisation becoming a reality in all developed and semi-developed countries, education needed to keep up with developments (McWilliams 2008). In modern society, the emphasis has moved away from acquisition of information (which was the ultimate goal in the past – the more information you could retain, the more valuable you were to society) to the use of information; a direct result of the fact that computers have become hands-on tools in our daily lives, both at work and at home (Willis & Drewell 2008). Through laptops, cell phones and the vast variety of technology in-between we have access to any information in the world at our fingertips in a second – the challenge now becomes how to access, prioritise and use this vast sea of information most effectively (Kench 2007). The very information itself on which we used to put such a high value is also changing, which further negates the value of it (Willis 2008).

These global issues led to the requirement for a new and more relevant system, and William Spady (Gouws 2007:60) came to the fore with his OBE philosophy that enables learners to interact more actively with the material, and in so doing they learn to apply instead of just retain the knowledge. Killen (2003:2), working alongside Spady, has contributed to this new movement in education through his research and work on redefining true validity and reliability of assessment. This requires a paradigm shift from the old emphasis on acquiring knowledge, to the new which enables life-long learning in all aspects of life (Spady 1993:2). The emphasis thus moved away from a *content-based* education, to one that included the use of Skills, Knowledge, Attitudes and Values (known as SKAVs) as it is almost impossible to interact with information without forming opinions and making judgements about it, however subtle they may be (IEB 2004). In summary, it is looking at what the learner knows and can do, as opposed to where they studied (SAQA 2000:5). The practicality of this, however, necessitates both the retraining of Educators, and the provision of a vast variety of new LTSMs (Learning and Teaching Support Materials), which, according to the DoE Learning Programme

Guidelines (2005a:20) need to be chosen with care, bearing in mind the cost implications and appropriateness to each specific group of learners.

Countries in Europe, Australasia, the Pacific Rim and North America have led this adoption of an outcomes-based approach to learning (Nel 2004), but each has applied it in a different way. According to Swart (2007) the media is quick to assert that countries like the United States and Canada have “tried and rejected” the approach, but the reality is that they have adapted it in various ways, as predicted by Spady and Marshall (1991:67). In fact, Van Niekerk and Killen (2000:93) talk about the United States, Australia and the United Kingdom being ‘strongholds of education’. During the 1970s in the United States, standardised testing programmes were introduced, with a move to national assessment programmes during the 1980s (Stiggins 2002:760). South Africa, with its unique demographics and dramatically changing political situation, also had to adapt the OBE system to make it relevant for both the advantaged and the previously disadvantaged schooling systems.

2.2.3 OBE in South Africa

The South African outcomes-based educational system has the same fundamental structures as those of Australia and the United States, but they are applied differently (Toddun 2000:26) due to the uniqueness of the South African context. In South Africa, the structure of OBE was originally envisaged as Curriculum 2005, but implementing this in a multilingual society, where access to resources differed widely between the top and lower ends (De Waal 2004:4), proved to be hugely problematic and the system had to be adapted to a more practical level.

Vinjevold (2008) (Deputy Director of General and Further Education and Training, Department of Education) opened her address at the IEB Assessment Conference by stating that South Africa has chosen the ‘Knowledge Economy’ route – and the Government is aware that it now needs to deliver on it.

The redesign of the system was rooted in the South African Constitution, (1996:8), where the Bill of Rights, Section 29 clearly states that everyone – amongst other rights - has the right to:

- A basic education, including adult basic education
- Further education, which the State, through reasonable measures, must make progressively available and accessible

However, even before the birth of democracy in 1994, major problems were being experienced within the Christian National Schooling system (Republic of South Africa Government Gazette. 1998:20) and the various Departments of Education realised that this would need to be addressed. According to the SAQA position paper (2000:2) some of these were:

- Inequality of Government spending between white and non-white learners, which resulted in an inferior education for non-whites, affecting their abilities to study further, get jobs and earn proper salaries.
- Segregated tertiary institutions, where this disparity continued.
- Inadequate training and facilities for non-white teachers.
- The gap between South African education and that of the rest of the world widening, which meant many closed doors for South Africans wanting to study and work overseas (Willis 2008).
- The low Matriculation pass-rate, and the inadequate preparation of learners (Republic of South Africa Government Gazette 1998:21) for tertiary education (including those from white schools) which was evidenced by the high failure rates in the first year of study, as well as the high instance of non-completion of degrees (Seepe 2008).

Van Niekerk and Killen (2000:93) note that the South African government has adopted many of the views on OBE as developed by Spady, but that it was mainly his concept of 'transformational OBE', and the con-current transformation of the South African political system that appealed to them.

In his lecture “Knowledge Intellectual Challenge” Seepe (2008) uses a very visual aid to show the poverty of education at the various levels in Africa as a whole, but a clear picture of South Africa also emerges, as the following two maps show:

- Map 1: The correct map of the world showing geographical land areas; and
- Map 2: Map adjusted to show the relative number of learners enrolled for FET phase.

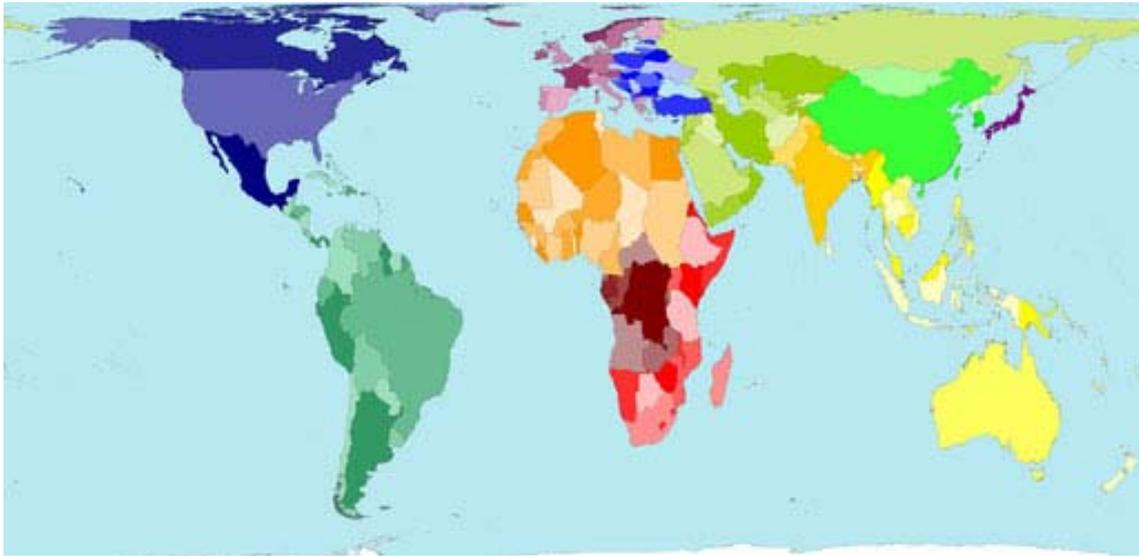


Figure 2.2 Map of the world – land area

Explanatory notes to **Figure 2.1** (Seepe 2008)

- *The land area of each territory is shown here.*
- *The total land area of these 200 territories is 13,056 million hectares. Divided up equally that would be 2.1 hectares for each person. A hectare is 100 metres by 100 metres.*
- *However, population is not evenly spread: Australia's land area is 21 times bigger than Japan's, but Japan's population is more than six times bigger than Australia's.*

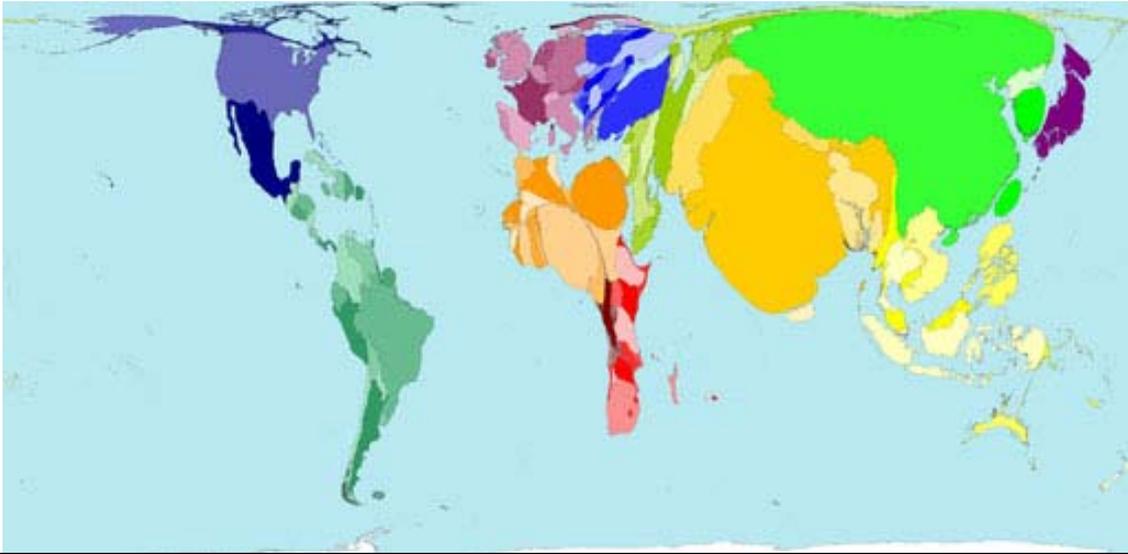


Figure 2.3 Map adjusted to show the relative number of learners enrolled for Secondary education

Explanatory notes to **Figure 2.2** (Seepe 2008)

Secondary Education (FET Phase):

- Worldwide approximately 73 million children are enrolled in each year of secondary education out of a possible 122 million children. That is only 60% getting a secondary education.
- In China on average 89% get a secondary education, but in India it is only 49%. Figures in Africa are even lower: 45% in Northern Africa, 25% in South-eastern Africa and 13% in Central Africa. The lowest is in Niger.

Seepe (2008) goes on to show other maps (from Early Childhood to HED education where the visual image looks even more grim for South Africa) and then he superimposes the extent of HIV/AIDS, malaria and tuberculosis on these maps, which show a further dwindling learner population at each successive level of education, and in the conclusion to his talk he asks the question: “When are we going to acknowledge that education is the answer to far wider issues than just learning and earning a living?” He maintains that South Africa has as yet not understood and accepted the power of knowledge and its role in the survival of the human species.

2.2.4 Curriculum 2005 (C2005)

Once the South African Government had chosen to embark on the OBE route, Curriculum 2005 became its vehicle of choice for delivery. Curriculum 2005 was launched by the then Minister of Education, Professor Bengu, in March 1997 with the release of 2005 multi-coloured balloons and the promise of a better future for all the learners of South Africa (Le Grange 2007:79).

It is important to briefly digress and make a distinction here between two concepts: 'OBE' and 'Curriculum 2005' are often used interchangeably; whereas they have two very distinct and different focuses (De Waal 2004:44). This misconception is due to the fact that *systemic* change is often assumed to be the same as *curriculum* change (SAQA 2000:1). OBE is a learner-centred, results-oriented approach to education/training based on the premise that all learners can learn and succeed (IEB 2004:15), whereas Curriculum 2005, and the revised versions such as the NCS for the FET, are the specific implementations of the system for South African schooling (Le Grange 2007:80). Criticisms levelled at one are not necessarily valid for the other. OBE is an educational direction that has been embarked on with great expense and effort – but the application of it will be fine-tuned and adapted as we gain experience and learn along the way. In Spady's (1993:ii) own words "OBE is NOT a program, a package, a technique, a fad, a quick-fix, a panacea, a miracle or an event. It is [a] transformational way of doing business in education."

Toddun (2000:31) reiterates that one of the main goals of Curriculum 2005 was to introduce a more 'consultative approach' in education, using such diverse stakeholders as the community, the private sector and parents to enhance the inputs into the educational offering of schools. But according to De Waal (2004:v), these educational reforms would present greater obstacles than anticipated by the government of the day, and in the end, transformation did not follow the timelines as originally anticipated. The Saturday Star (1 June 2000) reports that the process was under scrutiny by a review committee reporting to the (then) Minister of Education, Kader Asmal.

Contrary to their recommendation to totally reinvent C2005 with what they termed Curriculum 21, a revised version of C2005 was retained and, after a few 'false starts', South Africa took an approach of phasing in the changes more gradually, with the 2008 grade 12s eventually writing the first OBE exit level examinations (Nel 2004).

Curriculum 2005 stood on THREE pillars (De Waal 2004: 43):

- i. The introduction of EIGHT new learning areas (Republic of South Africa Government Gazette 2006: 11) with the values of democracy, non-racialism and non-sexism:
 - a. Languages
 - b. Mathematics and Mathematical Literacy
 - c. Natural Sciences
 - d. Social Sciences
 - e. Technology
 - f. Economic and Management Sciences
 - g. Life Orientation
 - h. Arts and Culture
- ii. The commitment to outcomes-based education
- iii. The provision of a foundation in general education up to and including grade nine level

2.2.4.1 Organisation of Teaching and Learning in an OBE System:

In order to create synergy between all levels of education and training in an OBE curriculum, a common curriculum framework was used in South Africa to structure courses from early childhood development through to the HET, and also including Adult Basic Education and Training.

This is structured in the following bands:

- **HET** – Higher Education and Training (post-grade twelve)
- **FET** – Further Education and Training (grade ten to twelve)
- **GET** – General Education and Training (grade seven to nine)
- Intermediate Phase (grade four to six)
- Foundation Phase (grade one to three)

At the FET level, each of the 29 subjects was divided into between three and five learning outcomes, with assessment standards that give the specifics on what the learner must do in order to achieve that level.

2.2.5 Organisations Underpinning Assessment in SA

An educational system cannot change without the implementation of the necessary statutory bodies to drive and monitor the provision and quality of education. In South Africa, the following organisations drive the educational sector:

2.2.5.1 National Qualifications Framework (NQF)

In the process of changing the educational system in South Africa, it was necessary to institute a national overriding body of control in order to give legitimacy and international comparability to qualifications. The South African Qualifications Authority Act (No. 58 of 1995) established the NQF (National Qualifications Framework) in order to register all national standards and qualifications which are described in terms of learning outcomes (SAQA 2000: 2-3).

BAND	SCHOOL GRADES	NQF LEVEL	QUALIFICATIONS
HIGHER		8	Doctor's degree
		7	Master's degree
			Honours degree
			Postgraduate diploma
		6	General first degree
			Professional first degree postgraduate
			Bachelor's degree
		5	First diploma
			Higher certificate
			Certificate
FURTHER	12	4	Diplomas
	11	3	Certificates
	10	2	
GENERAL	9	1	Grade 9 / Adult Basic Education and Training level 4
	8		
	7		
	6		
	5		
	4		
	3		
	2		
	1		
	R		

Figure 2.4: Structure of the NQF

Source: NQF [online] 2008

Table 2.1 The objectives of the National Qualifications Framework

The objectives of the National Qualifications Framework are to:

- i. Create an integrated national framework for learning achievements;
- ii. Facilitate access to, and mobility and progression within education, training and career paths;
- iii. Enhance the quality of education and training;
- iv. Accelerate the redress of past unfair discrimination in education, training and employment opportunities; and thereby
- v. Contribute to the full personal development of each learner and the social and economic development of the nation at large.

Source: National Qualifications Framework [online] 2008.

2.2.5.2 South African Qualifications Authority (SAQA)

According to the SAQA Act (1995:3) a juristic person called the South African Qualifications Authority was established, with the following functions (in brief):

- To oversee the development of the NQF, which includes the registration and accreditation of assessment bodies
- To oversee the implementation of the NQF, which includes assigning functions to the said assessment bodies, and the implementation of steps to ensure compliance and the registering of qualifications that are internationally comparable
- To advise the minister on aspects relating to these matters
- To control the finances of the Authority

2.2.5.3 Umalusi

In order to certify the new qualifications, SAFCERT (the old South African Certification Council) was replaced in 2002 by a statutory organisation, the Council for Quality Assurance in General and Further Education (IEB 2006:72). This name was felt to be too cumbersome, however, and was consequently replaced with the name Umalusi. (Parliamentary Monitoring Group [online] 2002:2): Umalusi, is an

Nguni word that means 'shepherd' - the idea being that the Council, by shepherding education and training bodies, wanted to lead them to produce and maintain quality education in South Africa. Both the Department of Education (DoE) and the IEB are registered with Umalusi as assessment bodies (Umalusi 2005: 3).

Table 2.2 Key functions of Umalusi

Umalusi's three key functions are as follows:

- i. Monitoring and moderating learner achievements, and issuing certificates at key points (including the NSC for the FET exit at grade 12).
- ii. Evaluating whether providers of education and training have the capacity to deliver and assess qualifications and learning programmes and are doing so to expected standards of quality.
- iii. Monitoring the standards of qualifications and their associated curricula.

Source: Umalusi [online] 2008.

2.2.6 OBE Terminology

The path to OBE is littered with new terminology and acronyms. In fact, one of the obstacles to a fast and efficient implementation of the OBE process has been the fact that it has required so much change in terminology, and the introduction of so many acronyms. According to Van Niekerk and Killen (2000:90) this leads to a 'feeling of disempowerment' for Educators. Even the NCS Policy document (2003b:15) states that "the language of learning and teaching needs to be accessible to learners" so the intent is there, but the execution certainly does not support this premise.

SAQA (2000:3), on the other hand, argues that if South Africa is take up its position in the global village, it needs to embrace the vocabulary of competence and outcomes, in line with countries in Europe, the Pacific Rim, Australasia and North America, who have either adopted or moved towards a system of outcomes-based education.

2.2.6.1 Changed Terminology

The first terminology change required the shift from labelling the years at school, which had been known as grades one and two, followed by standards one to ten (Nel 2004), to the introduction of the OBE terminology which recognised grade nought as an official school year, followed by the system of grades one to twelve for the rest of school life.

Table 2.3 Fundamental terminology changes

Old Terminology	New Terminology
Business Economics	Business Studies
Matric	National Senior Certificate (NSC)
Pupil	Learner
Remedial pupils	LSEN – Learners with Special Educational Needs
Standard Grade/Higher Grade	Levels of Achievement
Syllabus	National Curriculum Statement (NCS)
Teacher	Educator

2.2.6.1 New Terminology

In addition to the terminology changes, new ones were also introduced – once again with many acronyms that complicated the process:

- The process of systematically building on past learning is known as ‘**scaffolding**’ and it is measured by:
 - **RPL – Recognition of Prior Learning [online] 2008**, which requires only the ability to show that the learner can achieve certain outcomes, not standardised qualifications.

- The NCS for each subject is divided into between three and five **Learning Outcomes (LOs)** that give the broad outlines of what a learner needs to achieve, and these are further subdivided into **Assessment Standards (ASs)**, which describe in more detail the specific standards that need to be met.

These terminology lists are not exhaustive, however, and are included here at the end of the discussion on OBE merely to give a summary to the reader because the terms are used extensively in the rest of the research.

2.2.7 Summary of the Major Changes

As is evident from the discussion to date, the South African educational system has undergone a series of irrevocable and drastic changes, and 2008 is the watershed year for the FET, with the first set of grade 12s writing the new NSC (National Senior Certificate).

In summary, the major changes between the old and new systems are:

- The paradigm shift from a content-driven syllabus with an emphasis on short-term acquisition of knowledge, to a SKAV-driven curriculum where the specific content becomes immaterial, but a sense of life-long learning is fostered. The DoE (2003b:11) refers to this as the 'blurring of subject boundaries'. This also moved the focus away from teacher-centred learning, to learner-centred learning, (De Waal 2004:431) building skills such as research, group interaction and decision-making.
- Moving from norm-referenced reporting (IEB 2004:15), where class averages and a learner's individual average were compared to others, to a criterion-referenced system, where the learner's achievement against a set criterion is measured, irrespective of what they do in other subjects, or what other learners achieve. Spady (1993:18) pleads for the demise of comparative assessment with its related streaming, curriculum tracking and specific 'ability' groups.

- The system encouraged integration of SKAVs across both subjects and fields of learning (DoE 2003b:8), with integrated learning contexts and more varied and flexible types of assessments, giving learners better insight into the realities of the working world (James 2008:10) where actions and activities are not fragmented, and where decisions always need to be made within contexts.
- According to Nel (2004) a major change within the FET was also the fact that there was now no longer any higher grade or standard grade options (and in some instances there had even been a lower grade, but that faded out over time). The new requirement was to set questions and tasks at predetermined levels, which require 60% LOT (Lower Order Thinking) and 40% HOT (Higher Order Thinking) questions (Meyer 2008). This enables the weaker learners (who would previously have chosen standard grade) to complete at least 60% of the work based on knowledge, comprehension and basic application. The stronger learners were then further challenged with analysis, synthesis and evaluation of information. The choice of taxonomy of learning was left to the discretion of each subject, but Briggs' and Bloom's are popular choices (Swart 2007).
- Reporting, which in the past had been done based on percentages, is now converted to levels of achievement, defined by the NCS SAG (DoE 2008:5) as follows:

Table 2.4 OBE Levels of Achievement

RATING CODE	RATING	MARKS %
7	Outstanding achievement	80 – 100
6	Meritorious achievement	70 – 79
5	Substantial achievement	60 – 69
4	Adequate achievement	50 – 59
3	Moderate achievement	40 – 49
2	Elementary achievement	30 – 39
1	Not achieved	0 – 29

Source: Republic of South Africa Government Gazette 2006:20

2.3 The FET Phase

The FET phase (grades ten to twelve), which is the focus of this research, is the connecting level within the OBE system between the GET (grades seven to nine) and the HET (tertiary education). The Green Paper on Further Education and Training released by the Department of Education in 1998 defines the FET as follows:

“FET consists of all learning and training programmes from NQF Levels 2 to 4, or the equivalent of Grades 10 to 12 in the school system. It is the band within the NQF which follows directly on GET and precedes HET. Learners enter FET after the completion of the compulsory phase of education at Grade 9 or Level 1 of the NQF.”

(DoE 1998:2)

The White Paper on Education and Training, March 1995 (in Republic of South Africa Government Gazette 1998:10) states that the Ministry of Education takes the view that the FET is at the heart of integration between the educational and training systems, and that it should be broad and inclusive (1998:14), as well as enhancing learner mobility and progression. This responsibility to provide the opportunity to cross from FET to HET, or career training rests with both the Minister of Labour, who operates on the ‘demand side’, and the Minister of Education who operates on the ‘supply side’ (1998:16).

The Department of Education 2007-2011 Strategic Plan (2006:49) states that the FET phase is divided into a total of 29 subjects, although historically, a subject demarcated a set body of knowledge (DoE 2003a:6). The NCS, however, defines a subject by its learning outcomes, and subject lines are blurred as all subjects aim to achieve the critical and developmental outcomes, as well as their subject-specific learning outcomes. Within the FET, an NCS subject is deemed to be the equivalent of a 20-credit unit standard (DoE 2003a:3).

The cross-curricular emphasis and the inter-changeability of skills, however, are based on the following critical and developmental outcomes (DoE 2003a:2) - shown in **Table 2.5** - that are generic across subjects.

Table 2.5 Critical and developmental outcomes

The Critical Outcomes (CO's) require learners to be able to:

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

The Developmental Outcomes (DOs) require learners to be able to:

- Reflect on and explore a variety of strategies to learn more effectively;
- Participate as responsible citizens in the life of local, national and global communities;

- Be culturally and aesthetically sensitive across a range of social contexts;

- Explore education and career opportunities; and

- Develop entrepreneurial opportunities.

Source: Department of Education. 2003a:2

2.3.1 Problems Specific to the FET Phase

OBE, which was originally touted as the solution to all the tribulations in education (McWilliams 2008), inherited all the original problems (educational, political and social) from the old dispensation. As the very nature of education is long term, it will take more than a generation to make real inroads into solving problems such as:

- The adjustment from secondary to higher education in order to address the problem of high first-year failure rates and the low ratio of graduates to registered students. Davidowitz and Schreiber (2008:191) propose a model for facilitating the bridging of this gap, and McWilliams (2008) maintains that it exists because schools traditionally have tried to do 'front-loading' of knowledge – sending learners out into the world with what the school system thought was all the necessary knowledge they would need.
- Unemployment: For those matriculants not intending to study further, it was a battle to find jobs in a high-unemployment-rate market, (Vinjevold 2008) as they lacked marketable skills and the EQ (emotional quotient) to cope with the world of work.
- At the bottom end of the scale, matriculation failure rates were astronomical, and large groups of learners moved through this process without getting a matriculation certificate (Seepe 2008). Many of these do not have the finances or motivation to rewrite and end up without the skills to make a success of life in the harsh realities of the outside world (James 2008: 9).
 - Against this background, the crime rate; the rate of HIV/AIDS infections (Seepe 2008) and the dismal unemployment rates - especially in rural communities - continue at shocking rates.

- o But change is never easy, or without its victims, and although the end justifies the means where the bigger picture is concerned, there is a very real problem on the ground level with the learners who are caught in the middle of the process (Nel 2004).
- The FET learners are a product of what they learnt (or, more importantly, did not learn) in the GET phase. Although OBE has been systematically introduced through the education system from Foundation phase upwards, learners are currently arriving in grade ten without the necessary SKAV training expected. (This aspect will be covered in more detail in chapter four, as it coincides with the problems experienced in Portfolios.) The reality is that a lot of Educators are still more comfortable with knowledge-based teaching and the skills, attitudes and values have not been adequately built up (Meyer 2008).
 - i. One of the cornerstones of OBE, if the Educator is not going to be spoon-feeding information, is research. Proper research skills should then be taught (James 2008:8). Aspects such as finding and prioritising information and data, referencing and interpretation should be skills taught early in preparatory school.
 - ii. Plagiarism: A very real problem and something schools are only starting to address seriously now (Meyer, Topper & Russell 2009a:71). Learners should be taught from an early age about the different types of plagiarism, and how to avoid it. It is an ESSENTIAL skill if they are going to survive in either the tertiary academic arena or in the workplace (Kotze 2007:1).
 - iii. Team dynamics: Group work is an integral part of OBE, and yet learners have no idea how to constitute a group, how to allocate group roles, or the process of running a group.
 - iv. Attitudes and values cannot be taught without the basics of ethics and morals, and yet these also seem to be new concepts in grade ten.

2.3.2 The Importance of the FET Phase

There is no doubt that the FET plays a vital role both in education and the economy, with its primary goal of preparing learners for the working world (DoE 2003a:10). It is a strategic level in the educational system, preparing young adults either for the world of work, or for higher education (Seepe 2008). This affects the social, economic and cultural life of society as a whole. More importantly, in a developing economy and a young democracy such as South Africa, the need for skills development and economy building is crucial (Willis 2008).

Globalisation and technological innovation have led to an urgent need for the type of education and training that will equip young adults with the skills to cope with the increasing pressures and escalating competitiveness of a global economy (Barnes 1999:67). Production methods, the use of information and the quest for life-long learning are essential for the young South Africans of today (DoE 1998:3) and without a solid grounding in the FET phase, they will be inadequately prepared for the opportunities that the working world or the HET has to offer (Vinjevold 2008).

2.3.3 Future Development of the FET Phase

In South Africa the NCS is up for review in 2010, and will be adapted if necessary (Oberholzer 2008b). The SAGs (Subject Assessment Guidelines) are also updated on a yearly basis (Meyer 2008:1). One of the heaviest criticisms of the system at the moment is the fact that the increased need for resources, retraining and the confusing OBE-specific terminology is favouring the privileged and creating an even larger gap between them and the already disadvantaged. Le Grange (2007:81) argues that it would be entirely possible to implement OBE with less confusing language and less acronyms, making it simpler and more within reach of the disadvantaged communities specifically.

Vinjevold (2008) states that the Government has a targeted four-point plan to address the other issues through:

- Educator training
- Text provision
- Reclaiming time issues within government schools (i.e. intrusion of non-academic issues, strikes, absenteeism)
- Assessment support in the form of exemplars and assessment tools

2.4 The effect of OBE on Business Studies as a Subject

2.4.1 Previous Dispensation – Business Economics

Traditionally, Business Economics was provided as an alternative to learners who could not cope with Mathematics (Pullinger 2008). Classes were small, learners were not there by choice and in many cases Educators were gleaned from other subjects when they had 'spare time' on their timetables (Clark 2006). The feeling was that anyone could teach it. The standard joke in staff rooms, especially aimed at Educators of commercial subjects, was "Those who can, do. Those that can't, teach." Etzinger (2008) asks a pertinent question: "Why would someone with a BCom degree, who could be earning millions in commerce, be teaching Business Studies or Accountancy for a pittance?" The disdain of principals especially, as well as Mathematics and Science Educators, who would send learners to Business Economics when they were not coping with the 'more difficult' subjects, added to the problem.

The rather mundane syllabus, which included copious sections on aspects such as 'filing systems' and 'indexing' (specifically targeted to the type of learner who was battling with Mathematics), did nothing to alleviate the problem (Etzinger 2008). Unfortunately, this perception of the subject is still rife today.

In the late 1990s, with the New South Africa in its infancy, and hope for building a better economy, there was a simultaneous rise in many schools of a different generation of Business Economics Educators. Realising that not only Mathematics and Science, but also Entrepreneurship would be one of the key building blocks of a successful economy, many schools (e.g. The Wykeham Collegiate, The Kings School West Rand, Dainfern College) introduced Entrepreneurship at grade eight and nine levels. This was spearheaded by Wanda Booysen and Ann Kriel at The Wykeham Collegiate in Pietermaritzburg, who developed an Entrepreneurship Programme for Schools. The National Schools Entrepreneurship Conference (National Entrepreneurship Conference 2004) was hosted annually between 2001 and 2004 at Dainfern College by **the researcher** in order to provide training for Educators, and put them in contact with the suppliers of entrepreneurial resources such as books, courses and business games.

The IEB National Subject Forum (NSF) for Business Economics took a decision to start implementing changes and discussion centred on the introduction of research projects, rubrics and portfolios. Although still curtailed by a very restrictive syllabus, the examination panel (Mr Dave Clark (higher grade) and Mr Sean Topper (standard grade)) started introducing case studies to make it more relevant and made format changes (such as set formats for business reports), as well as introducing more application-based questions that linked with the working world and the way universities were assessing business subjects.

Individual Educators lobbied their principals for time-tabling that would enable learners to take both Mathematics and Business Economics, and they started convincing entrepreneurial and business-minded parents that it was a crucial subject for their children to take.

Slowly the tide turned, and with every school that started attracting more Business learners, others were encouraged to take up the challenge. Students at tertiary institutions started specialising in Business Economics by choice, and in 2002 the IEB started seeing the changes in subject registrations where there were more Business Economics learners than other choice subjects such as Science and Geography registering for the matriculation examinations (Nel 2004).

The accompanying extract (**Figure 2.5**) from the PowerPoint presentation at the 2006 national conference shows the growth in the number of candidates writing Business Economics in the IEB between 2001 and 2005. Breaking the 1 200 candidate mark (in 2005) was a significant achievement as it now qualified the subject as a major player within the IEB.

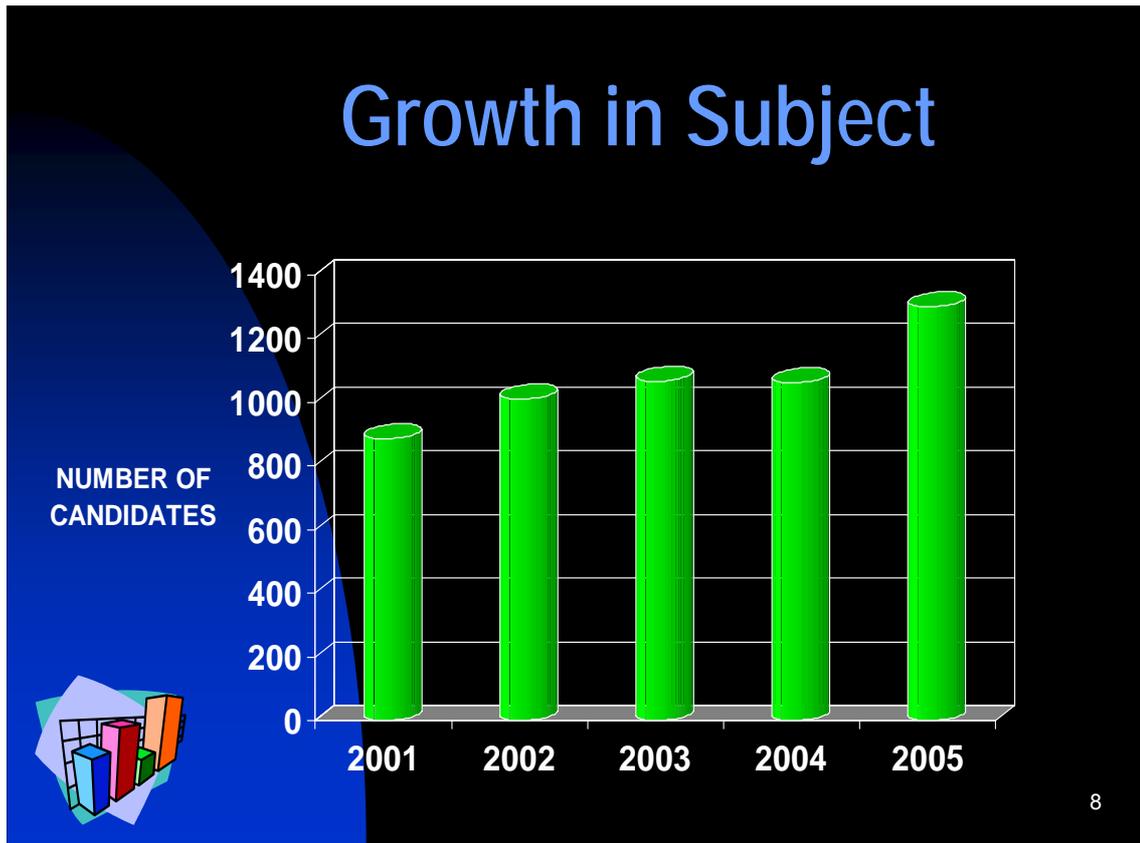


Figure 2.5 Growth in number of candidates for Business Economics in the IEB (2001 – 2005).

Source: Clark 2006

2.4.2 New Dispensation - Business Studies

With the advent of OBE, and the introduction of the NCS, the subject was deemed to have changed to such an extent that, in keeping with worldwide terminology (such as in the QCA – Qualifications and Curriculum Authority in England (Jewell 2000: 1)), the name was changed to Business Studies.

This name change was due to the move away from pure business management theory in the old syllabus, to the new Business Studies NCS that included such diverse aspects as creative thinking, problem solving, risk management and both contract and labour law (DoE 2003a:18;19;13;16;23). The aim of this was to coordinate with business, commerce and management fields in both the working world, and the HET band (DoE 2003a:10).

Under the new dispensation the NCS (2003a:9) defines Business Studies as follows:

“The subject Business Studies deals with the knowledge, skills, attitudes and values critical for informed, productive, ethical and responsible participation in the formal and informal economic sectors. The subject encompasses business principles, theory and practice that underpin the development of entrepreneurial initiatives, sustainable enterprises and economic growth.”

These issues are fundamental in designing new programmes and assessments, both to comply with the National Education Act (SAQA 1995), and to be relevant in the world in which we live.

Another major change in the way Business Studies is taught was brought about by the introduction of Mathematical Literacy. In the past, those learners who did not want to take Mathematics (often the academically weaker ones) would take Business Economics. In OBE it now became compulsory to take a Mathematical option (either Mathematics or Mathematical Literacy (DoE 2003b:19), and Business Studies became an equal partner with the other choice subjects. The added advantage of this was that all learners had at least some background in Mathematical thinking – which meant that graphs, basic calculations and financial literacy concepts in particular (which form a large part of Mathematical Literacy) no longer had to be taught under the banner of Business Economics/Studies.

The IEB seized the opportunity to bring about format changes in the examinations. One of the problems with Business Economics, which had previously been examined as one three-hour paper, was that time pressures always hampered proper interpretative writing for the business reports. To eliminate this, two different examination papers (IEB 2008c: 3) were introduced:

- Paper I – a two-hour, time-pressured examination of 200 marks which examines theory in a variety of formats such as SRI (Short Response Items), short and paragraph-type questions.
- Paper II – a two-hour practical, case-study based examination of 100 marks which consists of two 50-mark questions. These questions are of a more holistic, interpretative nature and the lower mark/time ratio allows for planning of answers, use of examples and own interpretation. The formats required are often of a more creative nature too, for example documenting an interview, preparing a PowerPoint presentation or writing a newsletter where part of the marks are allocated to presentation and it being targeted at the correct audience. (This is covered by Assessment Standard 12.2.3 (DoE 2003a:15) which requires the clear and accurate presentation of information in both verbal and non-verbal formats.)

The two papers are written on the same day, with a two-hour break in-between, and are based on the same general theme or case study.

2.4.2.1 National Curriculum Statement for Business Studies

The full NCS is a lengthy document, but in order to illustrate the new skills and outcomes required for Business Studies, a summary of learning outcomes and their associated assessment standards is given in **Appendix A**.

There is no doubt that the changes within the subject have been for the better, and that the current Business Studies learners moving out of the FET phase will be far better prepared for both the working world and the HET courses into which they are entering. As seen in the next section (2.5) there is also a different type of learner who is choosing Business Studies as a subject.

2.5 The Business Studies Learner in the FET

2.5.1 Changing Learner Profiles in General

The aim of the new educational dispensation is to produce learners who are better prepared for both higher education and the realities of the working world.

The kind of learner that is envisaged to emerge from the FET is defined by the NCS (2003a:5) as follows:

“...one who will be imbued with the values and act in the interests of a society based on respect for democracy, equality, human dignity and social justice as promoted in the Constitution.”

Davidowitz and Schreiber (2008:195) add that if learners want to enter higher education, they will need a multidimensional approach to education, with life skills that will enable them to cope within a Tertiary Institution.

It is also important to keep in mind the increasing cultural diversity within our schools. From segregated education in the Apartheid era, to the current ‘access for all’, South Africa has come a long way in its young democracy. Classrooms in South Africa are increasingly representing multiple cultures and races (Mwamwenda 2004:262), and this requires both Educators and learners to let go of prejudices and preconceived ideas. Perceptions such as Jewish children are good with finances and Portuguese families, for example, being associated with fruit and vegetable sales need to be banned. Urban legends and cultural heritage are an integral part of our society, and with the diversity of cultures in South Africa, it is important that we not only break unrealistic stereotypes (Meyer, Topper & Russell 2009:214), but also build on a learner’s heritage in the process of educating. This is especially important in developing resources (such as textbooks) and the setting of exemplars and examinations where bias needs to be constantly guarded against – it is one of the standard questions on moderation forms for examinations (IEB 2008d:2).

2.5.2 Changing Learner Profiles in Business Studies

In line with the general changes in learner profiles, the Business Studies NCS (2003a:5), as a choice subject, seeks to attract top learners as well as catering to those who are academically challenged.

It aims to ensure that these learners, by achieving the cross-curricular critical and developmental outcomes as well as the specific learning outcomes of the subject will:

- Become life-long learners
- Be able to think logically, critically, holistically and laterally
- Have portable skills to enable them to cope with unfamiliar situations

As a result of the changes to the subject as a whole, as well as the new approach to the curriculum (as discussed in Section 2.4), the past five years have seen a drastic change in the type of learner that chooses Business Studies (or Business Economics in the previous system) as a subject.

Today, instead of the learner who cannot cope with Mathematics, it is not uncommon to have the school *dux* learner in a Business class. Within the IEB Business Studies is now recognised as a major subject, drawing over 2 000 entrants annually (Luckay 2008). This puts it into the top category of subjects, which has resulted in the following:

- Its eligibility to be chosen for Umalusi audits (Umalusi 2005:7)
- Being one of the 16 subjects chosen to pilot the Regional Moderation Pilot in 2008 (IEB 2008b:Annexure 1)
- Being given timetabling preferences with the setting up of the grade 12 examination timetable

- Having an Analytical Moderator appointed for the purpose of tracking statistics on the subject from 2008 onwards (Oberholzer 2008b)

It is also interesting to see an increasing number of black learners in Business classes, as they understand the importance of Entrepreneurship and business skills in providing employment at a later stage.

In addition, as envisaged by Spady (1993:30) the educational offering has changed: Educators are far more focused on the learner as an individual, instead of on the content of a syllabus. As will be seen in chapter three (Section 3.3.4), Business Studies lends itself well to individualised teaching and the richness of current affairs and economic problems gives an endless supply of challenges for the astute learner to go into enrichment or additional levels of learning.

2.5.3 Grade 12 Learners of 2008

The grade 12 learners of 2008 have been the guinea-pigs for each year of change (Johnstone 2008). They have had to spearhead the new system with Educators who are unsure of what to do and how to set standards. They were the first to write Core Skills tests in grade nine and standardisation examinations in grades ten and eleven in order to build up databases with which to compare the 2008 final results (Janisch 2008). Even those results will only be a short-term reflection of success or failure. If there are major deviations, statistical adjustments will be made (Oberholzer 2008b), and it will be years before their true successes and failures can be measured through their success or failure in tertiary study and in the world of work.

It would be interesting to note whether long-term studies have been set up to track their progress, as adjustments to the system needs to be made sooner rather than later if a whole generation is not to be lost. Anne Oberholzer, CEO of the IEB, is unaware of any such studies, and has raised concerns regarding whether this challenge is being taken up by any of the universities (Oberholzer 2008a).

There were 2 460 learners registered to write Business Studies under the IEB banner in 2008 (Luckay 2008) and the IEB had set up an Analytical Moderation system to track various types of data from 2008 onwards (Oberholzer 2008b).

2.5.4 Influence of South African Labour Law on Learners

The reality of the working world in South Africa today cannot ignore the requirements of the Labour Law, (The Labour Relations Act (LRA), Act 66 of 1995:1) that aims to “promote economic development, social justice, labour peace and democracy in the workplace” (Labour Relations [online] 2008:1) and which was promulgated to give effect to the changing rights of the new Constitution.

Likewise, it would be foolish not change the way learners are educated in order to prepare the FET learner for these realities that they will have to face in the future. Dryden and Vos (2005:96) quote Dr Willard Daggett (Director of International Centre for Leadership and Education) who cautions that “the world our kids are going to live in is changing four times faster than our schools”. Business Studies is well placed to address these issues, as both in a general business sense and South African economic environment, Business Studies learners will study these laws, what they attempt to achieve and how they relate to them personally (Refer to AS 12.1.3 and AS12.4.3 on **Appendix B**:11 & 19).

The following Acts are of particular importance to grade 12 learners, as they affect not only their future job and investment opportunities, but also the quotas for selection courses at University. It is a sad reality that in the process of addressing the issues of the past, current learners are being disadvantaged due to their skin colour:

- Basic Conditions of Employment Act
- Employment Equity Act
- Black Economic Empowerment Act
- Skills Development Act

Table 2.6 Differences between Employment Equity and Black Economic Empowerment

<u>EE</u>	<u>BEE/BBEE</u>
Employment Equity.	Black Economic Empowerment (or BBBEE – Broad Based Black Economic Empowerment).
Emphasis on creating jobs.	Emphasis on empowering blacks to: <ul style="list-style-type: none"> • Get into management; and • Become shareholders (ownership).
Includes previously disadvantaged groups: blacks, coloureds, Indians and now Chinese (since June 2008), females and the disabled.	Includes only blacks, coloureds, Indians and now Chinese (since June 2008).
Enforced by EE Committee within business, based on Labour guidelines.	Judged on BSC (Balanced Score Card) for each particular industry and type of business.

Source: Meyer, Topper & Russell 2009:179

2.5.4.1 Basic Conditions of Employment Act 1997 (BCEA)

The Basic Conditions of Employment Act [online] which came into law in 1998, regulates the working conditions of over six million workers in South Africa, and protects them against exploitation through for example long working hours, poor working conditions, unreasonably low wages, insufficient leave allowances (Meyer, Topper & Russell 2009:178).

By understanding how the BCEA works, learners are empowered when they go out into the workplace by knowing their rights, as well as knowing where to access the updated information on Labour Law, and what their recourse is in the event of encountering problems.

2.5.4.2 Employment Equity (EE) Act No 55 of 1998

Employment Equity is an attempt to address the Apartheid issues of the past. Initially introduced as Affirmative Action, the idea was to create better employment opportunities for previously disadvantaged groups such as: non-whites as well as females and the disabled (PostNet 2008: 13).

Affirmative Action, however, was purely racial and led to a lot of 'window-dressing' in management posts when the incumbent did not have the necessary skills for the job. EE looks to give the designated groups preference in cases where their qualifications and training are adequate, and their skills are at least comparable to those of non-designated applicants.

From an Employment Equity perspective, it is important for all learners to understand the constraints on themselves in respect of getting employed. Job advertisements openly state 'EE appointments only'. More importantly for the learner wanting to study further, this also feeds back into selection programmes at university where racial quotas are adhered to for courses with restricted numbers. It is extremely important for a grade 12 learner to understand this dynamic when are applying for tertiary education, and making career choices.

2.5.4.3 BBBEE (Broad Based Black Economic Empowerment)

BBBEE was introduced to move economic power into black ownership. It was originally introduced as BEE (Black Economic Empowerment) and was later broadened to include other non-white groups, including the Chinese in a June 2008 court decision (Chinese BEE [online] 2008). There are several factors taken into consideration in calculating the Balanced Score Card for BBBEE, and businesses, depending on their industry, can gain points through such aspects as training, corporate social responsibility and selling shares (known as 'Black Chip Shares') at a discount to non-whites (Lebogang [online] 2008).

The black, coloured, Indian and now Chinese learners who are studying investment and financial concepts are empowered by understanding the share offerings of companies such as Sasol and Vodacom who have BBBEE empowerment deals, as well as the reason why it is important within the South African economy to move economic power into a more representative ratio.

However, the most important contribution that Business Studies makes in the EE and BBBEE arena is probably in providing the answers for the white male learners who are excluded from both, as well as the female and disabled learners who are excluded from the BBBEE opportunities.

Many of them see it as reverse discrimination, and at a time when learners are taking crucial career decisions, which could eventually affect their decision to stay in South Africa or emigrate, it is vital for them to have all the facts. They need to be aware of alternatives such as acquiring unique and specialised skill sets, alternate study options and ultimately entrepreneurship, which would enable them to provide the jobs, and not be dependent on being employed. In that way it could enable us to retain their skills in South Africa, instead of losing more of our youth to the 'brain drain'.

2.5.4.4 Skills Development Act No 97 of 1998 (SDA)

When the ANC government came into power in South Africa in 1994, one of its aims was to increase training in order to create employment, as a result of the fact that only 20% of our economically active population was highly skilled (Meyer, Topper & Russell 2009:181). The ANC appeal to the business sector to partner them in this, however, did not produce noticeable growth in the economy and in 1998 the Skills Development Act (SDA) was introduced, which is a compulsory levy of 1% on the total remuneration paid (PostNet 2008:2). This is administered by the SETAs (Sectoral Education and Training Authorities) and businesses that provide training for their own employees (subject to certain conditions) by registered providers can claim back a percentage of this levy. The unclaimed portions are used for training of Previously Disadvantaged Individuals (PDIs) in order to upgrade their skills and increase their employability.

This affects Business Studies learners in that it is an extension of the OBE principle of life-long learning and underwrites the concept that irrespective of which career they go into, it will be necessary for learners to keep up to date with technological advancements. It also links to other sections of the curriculum, such as social responsibility (AS12.1.2 & AS12.3.8 – See **Appendix B**: 10&17) and understanding the importance of contributing towards training in order to build the economy and provide opportunities for others to do the same.

Business Studies addresses this specifically in teaching Entrepreneurship and a culture of entrepreneurial thinking that looks to provide solutions by creating businesses and providing employment, as opposed to looking at being employed. If the State of California, which thrives on a strongly entrepreneurial culture - and contributes more to the federal coffers than it receives in benefits - were an independent nation, it would have the eighth largest economy in the world: the first seven being the USA, Japan, Germany, China, United Kingdom, France and Italy (California [online] 2007). If the FET educational system could build this foundational thinking in the minds of learners, then, irrespective of what careers they follow, the youth of South Africa could start working towards changing the economy of the future at a far more rapid rate than is currently happening.

2.6 Conclusion

Spady (1993:27) looks at the future direction of OBE by explaining that it opens the door to 'profound changes' in the way education is approached, but that it is conditional on two factors (1993:28):

- Educators and schools taking up the challenge to prepare learners for a future that is markedly different from the past; and
- The ability of HET institutions to be the 'gatekeepers' of occupational and economic statuses in society, in order to define appropriate curriculum requirements.

The aim of this chapter has been to look at the immense challenges facing Educators and learners in the FET phase. As shown, this is both compounded by the problems of the past educational system (which are still hampering equality of education and have created problems that are impossible to solve in one generation), and the challenges of a new system. In addition, the complexities of the South African economy has hampered the smooth introduction of C2005 and this has created even more challenges that need to be addressed, challenges which this chapter has attempted to quantify both in respect of the FET phase in general, and Business Studies as a subject in particular.

This is essential if the FET is going to send successful candidates into the world of work and tertiary education. Unfulfilled workers in the job market do not contribute optimally to the economy, and most of the problem citizens such as criminals and prisoners are in fact potential contributors if they could only find their niche in society – but sadly, many of them lost their way during school, which is the point made by both Park, who speaks to learners and Educators, and Ramatlakane, (Park as quoted by Ramatlakane [online] 2006) debating the problems of Community Safety in the Western Cape legislature. According to Feinberg (founder of the Tomorrow Trust, a representative for Steven Spielberg's Shoah Visual History Institute), South Africa is facing a crisis of losing another generation, something we cannot afford (Feinberg [online] 2008), and it is in the hands of social entrepreneurs to seize the opportunity and not wait for government intervention.

In addition, Business Studies learners (or those that study business at HET level) are primarily the ones that will ultimately own the businesses, keep the wheels of the economy turning, provide employment, build the wealth and empower the workers to create better lives for themselves and their children in the future.

In chapter three the development of assessment methods in education as a whole will be analysed and especially the changes in assessment that are required by the introduction of OBE in South Africa. It will also show the position of the IEB within the South African educational context, and how it has – under the guidance of Umalusi - applied the OBE principles within the schools under its jurisdiction.

**Chapter 3 - Assessment in
Outcomes-based Education and
the IEB**

3.1 Introduction

Spady (1993:18) harshly criticises traditional assessment methods by saying: "Success is defined in a given way and creates, simultaneously, the conditions that produce failure." He motivates this by saying that in the past learners were judged on sets of criteria which were not well defined, and given only one opportunity to attain a mark with a norm-referenced system that ultimately created expectations (either good or bad) which accompanied a learner in any given subject.

In chapter two the **researcher** looked at the profiles of both the learners under the old system, who were victim of this performance trap as explained by Spady (1993:18); as well as the profile of the current FET learners, both in general, and more specifically of those learners who are choosing Business Studies as a subject. In order to do that, it was necessary to look at the historical development of OBE as an educational system, and in particular the effect of the underpinning ideologies and assumptions on which it was built, (both from a world-wide perspective and the introduction into South Africa) on changing the subject of Business Economics in the old dispensation to Business Studies in the new.

This chapter will deal in more detail with assessment which, according to Brown-Chidsey (2005:10), occurs when a decision is made in the process of learning and someone wants information to support that decision. However, although assessment has been coined as a very specific phrase in OBE, it is a process which has occurred throughout the ages in training and education, irrespective of the system used. Therefore, in order to understand the complexities of assessment in OBE today, it is necessary to take a brief look at the historical development of educational systems prior to OBE. It is clear that the current system is a product of past systems, political structures and interventions. Thankfully, Buchen (2005:131) notes that slowly *learning* is starting to replace *schooling* as the priority. Also integral to these changing assessment methods is the rapid growth of technology - the role that it plays will be explored later in the chapter. Van Niekerk and Killen (2000:90) conclude that education is important as a tool that gives meaning to our lives and to our existence.

In conclusion, this chapter will also explore the introduction and growth of the IEB as an independent assessment board, and its relationship to the DoE and Umalusi. The IEB is central to the assessment issues for the majority of private schools in Southern Africa (the IEB assesses across borders to neighbouring countries like Botswana, Namibia and Mozambique (Nel 2008)). Figure 3.1 depicts the aspects relating to assessment which will be explored in chapter three:

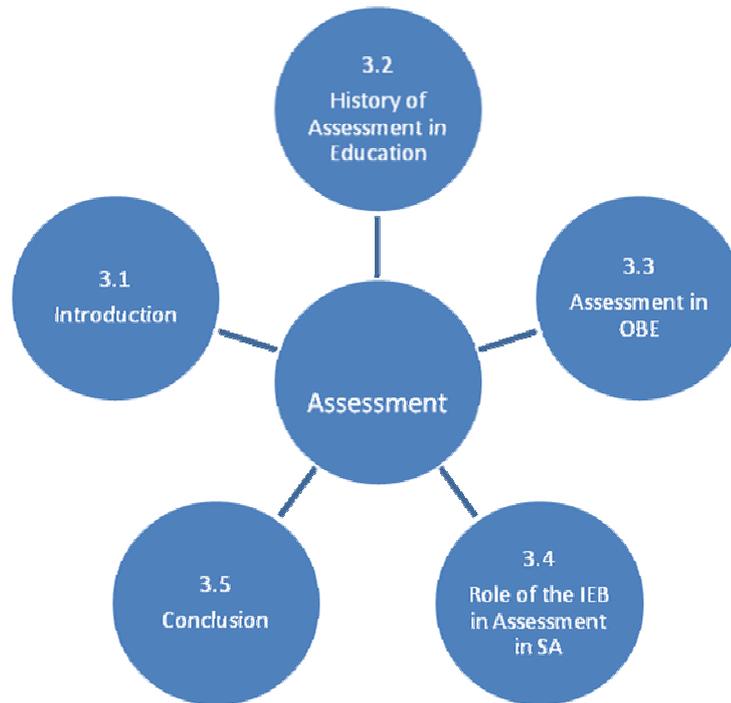


Figure 3.1 Aspects of Assessment discussed in chapter three

3.2 The History of Assessment in Education

The current educational system is a product of the past – both locally and internationally, so it is important to trace a brief history of the path that has led us to where we are today. Pulliam (1968:11) notes that American education (and assessment methods) is deeply rooted in the foundations of European history, as intellectual capital originated and flourished there before it crossed the oceans. The same is true of South African education.

In addition, for a large part of history, schooling and training were interchangeable as a child's education was aimed at ultimately producing a productive adult. The concept of learning for the sake of learning only evolved in more advanced societies such as the Greeks and Romans, and developed during the post-Industrial Revolution era.

The role of education has, of necessity, changed drastically over the years. It is the duty of the current Educators to continue to adapt in order to be relevant in the highly advanced and rapidly changing technological environment of the 21st Century (McWilliams 2008).

3.2.1 Home Schooling

The original Educators were parents or at least, the members of the extended family unit. Life existed on a subsistence level, with both parents fulfilling their roles in and around the homestead. Children inevitably followed in their parents' footsteps. There was little choice of, or even exposure to other roles in society. A child learnt by watching and doing, and success was judged according to the ability to replicate the actions of others.

Throughout the ages and various educational systems, home schooling has remained a part of many children's lives, either on an exclusive basis (where they attend no other school), or in partnership with formal schooling.

Ironically, the current move to home schooling is stronger than ever. In the United States, more than two million learners were being home schooled in 2005 (Buchen 2005:172) –predominantly due to a moral choice and dissatisfaction with the proffered schooling systems. In South Africa, home schooling has been legal since a 1996 provision in the South Africa Schools Act (Homeschooling [online] 1996). Assessment is done through registered home schooling associations, often in conjunction with local schools or examination bodies such as the IEB.

3.2.2 The Birth of Formal Education and Assessment

As man became more sophisticated, roles in society became differentiated. The Greeks were the first to pursue an understanding of knowledge; the Spartans advocated military training as far back as (+/- 800 - 338BC). The Athenians (+/- 800 - 3146BC) idolized citizenship, culture and civilization (Kruger 1992:20). Differentiated roles enabled some people to provide for the survival needs of the masses, while leaving others free to take on 'higher' responsibilities such as leadership, religious, entertainment and co-ordinating roles. This clustering of functions outside the family home resulted in growing children being exposed less to the tasks that adults fulfilled on a subsistence level. The advantage was that they were able to observe a larger, richer variety of roles in the community around them.

These changes resulted in the need for a more institutionalized type of education, and formal assessment was born through standards that were set against which achievements could be measured. Drucker (quoted by Dryden & Vos 2005:41) recounts the story of how the printing press was invented by Johannes Gutenberg in 1451-53 which resulted in an upsurge of learning and research amongst adults, but sadly schools resisted the use of books for a further two centuries. Eventually, the Jesuits and Comenius created schools based on book learning, and this changed the type of education being offered: less time was spent on laborious copying out of information, (with all the emphasis on aesthetics and neatness) and more importance was given to the gaining of knowledge. Plato, a Greek philosopher (c. 427 BC - c. 347 BC), founded The Academy, one of the first recorded formal schools (Plato [online] 2008). His main mentor and teacher was Socrates who, tragically, did not record much of his own work. Plato (who was also strongly influenced by the Pythagoreans), in turn passed on the baton to Aristotle, who became his student.

Like other societies of the time, the Romans and Jews initially followed a domestic education (+/- 753 - 65BC) with emphasis being placed on high moral values, family and religious ideals (Kruger 1992:21).

There was, however, no freedom of career choice: various societies dictated roles such as wife and mother for females, and the eldest son followed a religious calling with the second son carrying on the father's business. Hence children who wanted to digress from the expected path would often be alienated by the family. Careers were a product of necessity, and there was no concept of matching personalities or the child's ambitions to the chosen careers.

During the 17th century the most striking educational advancements were in mathematically-based subjects (Van Wijk and Van Zyl (Ed) 1993:202) which led to later advancements in Astronomy and Physics.

3.2.3 Industrial Revolution

Eventually, with larger communities developing, and specifically after the Industrial Revolution in the 17th and 18th centuries (Fordham [online] 2008) where labour that had previously been done by humans and animals was replaced with machinery and steam power (Brink et al 2008:124), the world of education changed irrevocably. The new dispensation required workers to leave home and work in centralised locations which led to urbanisation (Brink et al 2008:132) and the use of child labour. With a lack of parental guidance and home education, generations of working-class children had no formal education. Eventually, the churches took on this role, but in 1870 Britain passed laws to prevent child labour and the government provided public schooling where assessment needed to be done in order to determine levels and criteria for advancement. Learning now became more theoretical, and the first major error (the consequences of which are still evident today) was to aim education at the faceless masses. There was no acknowledgement of individual learners needs or abilities.

3.2.4 World Wars

World War I (1914 – 1918) and World War II (1939 - 1945) also had a great effect on education as a result of the dramatic increase in demand for technical skills and innovation (Kruger 1992:188). It is interesting to note that the war era led to the emancipation of women in the workplace – with men being at war, and many killed, women had to take over jobs in factories which had previously been a primarily male domain. Task assessment in training now became vital as lives depended on workers being fast and accurate.

3.2.5 Post 1945 – pre-OBE Education Internationally

After the World Wars, the race was on to rebuild ruined economies. The Japanese, who have always placed great value on education, were determined to regain their status in the eyes of the world after the devastation of Hiroshima. China also accelerated their educational systems by setting high goals of international standards based on what the economies of the future would require (Buchen 2005:130). According to Sunter, the Chinese are still fuelling this 'Super Dragon' (Sunter [online] 2008) through funding of private schooling and encouraging Chinese learners to study overseas - especially in Africa, which China is targeting for all the resources that it is short of. Learners who become familiar with the cultures and economies of these countries will be at an advantage in the business world of the future. Although outside the scope of this research, it does raise an interesting question: If China succeeds in becoming a superpower, how would they rate success, (in other words, how would they approach assessment) and how will that affect the rest of the world and Africa, in particular?

Sadly, the same educational advancements did not occur in the West. Dryden and Vos (2005:92) make the statement that "Compulsory schooling began in Prussia in 1717 with teacher, chalk and blackboard – 300 years later, many schools around the world still use the same outdated 'cultural ritual'."

3.2.6 Post 1945 – pre-OBE Education in South Africa

In the wake of the World Wars, South Africa like other countries had to return to economic stability and normality. However, three major developments occurred in succession to determine the road the country would take:

In 1948, the Nationalist Party (NP) came into power and the foundation was laid for separate racial development - ultimately known as Apartheid. Ironically, it was the same year (1948) as the United Nations Declaration of Human Rights (McGaw, Natrass & Roberts 2001:46). Legal segregation of schools according to race and ethnic groups came into being with the birth of Apartheid (Mda 2000a:44) when Verwoerd became Prime Minister in 1958. Segregation resulted in 15 different education departments.

In 1961, South Africa left the Commonwealth and became the Republic of South Africa (McGaw, Natrass & Roberts 2001:48).

In 1976, the learners of Soweto protested against being taught the majority of their subjects in Afrikaans. The ensuing unrest and numerous deaths highlighted the plight of learners to the extent that it was the start of political change in South Africa (McGaw, Natrass & Roberts 2001:46) - even if that change took 18 years to materialise.

Education during this period is summed up by Toddun (2000:31) as being a system where the Christian National government implemented their educational strategies (including separate schooling) in a manner that excluded parents and the community through closeting Educators and learners in school environments without any significant outside influence. Assessment, which at this stage was primarily examination and test-based, provided very few alternatives for learners with broader abilities and individual needs. As discussed in chapter two (Section 2.2.3) schools were re-integrated in 1994 with the birth of the new democracy.

Johnstone (2008) records the tragic fact that by 2005, in South Africa, the senior secondary school curriculum, NATED 550, had been in existence with minimal change for nearly 30 years. Despite the increased sophistication in technology (the advent of the internet and television exposes the youth to global information and choice of a plethora of career opportunities,) schools are still primarily 'chalk and talk', (Gouws 2007:61) or, as quipped by McWilliams (2008) "a place where young people go to watch old people work!".

Although education has become a global priority, with nations vying for a competitive advantage in all sectors of education (Buchen 2005:131), the type and provision of it needs to change at a faster rate than it is at present in order to keep up with technological changes and global issues. This is because, to a large extent, education is *still* aimed at the broad masses, making very little attempt to accommodate the remedial, kinesthetic or brilliant child. Lecturing is still the main means of transmitting information (Dryden & Vos 2005:415).

Learners in this process are often not active participants and are merely expected to take what they can from the educational smorgasbord offered to them – and make the most of it.

Specialised schools and programmes are the luxury of the very rich, or the saving grace of the learner who needs to be crisis-managed. In 1992, Kokot raised the concern that in South Africa it is almost impossible to obtain funding for individualised testing and training of learners within the strengths of their own unique abilities (Kokot 1992:227). Little has changed since. One exception is the newly opening Academy College (in Pretoria) which is running specialised Swimming, Golf, Cycling, Football and Dance Academies on a common campus with the academic program designed to accommodate training and competition schedules (Academy College [online] 2008).

In the late 1980's, however, the winds of change were starting to blow – at least within the *theory of education*. Arising from the research of psychologists such as Howard Gardner and Robert Steinberg, a 'cognitive revolution' was happening with the redefinition of the ways to view intelligence (Gouws 2007:61; Muncy 2006:301). In addition, the new system that Spady (1993:7) was advocating provided the answers to the questions these psychologists and many others were asking: How to differentiate education and assessment for learners with different intelligences?

3.2.7 Outcomes-based Education (OBE)

In chapter two, section 2.2.3 the **researcher** discusses the implementation of OBE as an educational system in South Africa: exploring both the aims of the government in aligning education with the new Constitution and the rationale for choosing a system which is more flexible and links with a significant number of international countries. It is therefore fitting to conclude this section on the history of education with the history books open and ready for the next chapter to be written by the current generation of Educators. With the curriculums re-written, it is in the area of assessment that a paradigm shift is urgently required in order to bury the old and establish the new - the subject of discussion in the following section (3.3).

3.3 The Concept of Assessment in Outcomes-based Education

The introduction of OBE is seen as a transformational tool (DoE 2003a:2) which uses education to impact society at large. As discussed, the introduction of OBE has required change on many levels, but the issue of assessment has been the most challenging adaptation for educators. Klenowski (2000:216) states unequivocally that assessment is an integral part of teaching and learning.

The '*IEB Assessor Course for Teachers*' (2004:12) defines assessment as follows:

"A process which involves:

Generating and collecting evidence of learner achievement;

Evaluating this evidence against outcomes; and

Recording the findings of this evaluation."

In the pre-OBE era, assessment was often subjective, without clearly defined criteria and no transparency. Learners did not know (and often did not question their right to know) why or how a certain mark was attained.

Based on the Government's acceptance of OBE as the educational system for South Africans, The Government Gazette (1998:31) states that assessment has two distinct objectives:

- Providing valid and reliable information, and
- Serving a developmental and formative function.

This is in line with Spady's (1994:18) argument that it is important to choose 'outcomes of significance': If the goal is not clearly stated, it is impossible to assess the learners' ability (or inability) to achieve it.

Spady (1994:18) defines outcomes as "...high quality, culminating demonstrations of significant learning in context" and qualifies the main concepts in this definition:

- 'Demonstration' implies that it is not merely a mark given, but a clearly defined process that the learners understand and are able to carry out;
- 'High quality' meaning that it is thorough and complete. This is a controversial aspect due to the fact that much of what Educators accept and mark, is incomplete work;
- 'Culminating' refers to an exit point at the end of a given task;
- 'Significant Learning' which encompasses the content; and
- 'Context' which refers both to the context of the learner, the setting and the culture within which that learning occurs.

Killen (2006:xii) further underwrites Spady's views (1993:19) by stating that after setting these 'unambiguous' outcomes, the Educator needs to design back to the task, creating the foundation that learners need for completing the task.

3.3.1 Assessment FOR Learning

Stiggins (2002:761) differentiates between 'Assessment OF learning' (which provides evidence of achievement for reporting purposes) and 'Assessment FOR learning' (which provides information to the learner to facilitate future learning). By taking a strong stand on assessment (Stiggins 2002:758), he states that most Educators concentrate on 'Assessment OF learning', by trying to find the answers to the wrong questions. Instead of asking - as has been the case: "How can we use assessment as a basis for doling out rewards and punishments to increase teacher and student effort?", the question should be: "How educators can be helping learners to 'want to learn', and 'feel able to learn'?" (Assessment FOR learning). This is done by using each assessment task as a stepping stone to achieve higher levels.

Related to this, he (Stiggins 2002:759) argues that instead of looking for more sophisticated ways to generate valid and reliable scores, Educators should be looking at ways to maximize the positive impact of scores on learners. Polly et al (2008) underscore this by emphasising that 'Assessment FOR learning' makes the learner take responsibility for and reflect on their own learning. Béguin, Kremers, & Alberts (2008) add that this learner engagement allowed for better reporting and future learning. In similar vein, Nel (2004) calls this 'assessing forwards', and maintains that the future learning gained from assessment, for Educator and learner alike, is at least as valuable as the recording and reporting of current achievements.

3.3.2 Assessment Practice in South Africa

Assessment in South African Schools is standardised through the National Protocol for Recording and Reporting (Republic of South Africa Government Gazette 2006:8). This process is based in the requirements of the NCS, and includes the collection, analysis and interpretation of information about learners' abilities and achievements in order to make decisions regarding their progress. It may occur on both a formal and informal basis (2006:9), and it is the responsibility of the Educator to plan around collecting different forms of assessment as evidence.

3.3.3 Dangers of Ineffective Assessment Practice

Klenowski (2000:217), however, cautions that there is a danger that assessment is used purely to measure content, and not the other skills, values and attitudes related to learning. In addition, Van Niekerk & Killen note (2000:99) that educational reform can only happen with a change of attitudes, values and ideologies towards learning in a societal context. This should be kept in mind by Educators when doing their assessment planning.

Some of the overriding assessment problems (as discussed in more detail in chapter four) that have been experienced in changing to the new OBE Assessment methods include:

- The education paradigm shift that is necessary to move from the old to the new system of assessment;
- Changing from norm-based to criterion-based assessment;
- Changing from an Educator-based to a Learner-based educational approach;
- The impact of a shift in thinking from Christian National Educational Policy, to OBE policy;
- The re-training of Educators and the increased administrative load that comes with OBE assessment;
- Lack of resources to implement new assessment methods (for example, rural schools which are not able to photostat rubrics for learners).
- Accommodating the strengths and weaknesses of individual learners.

3.3.4 Assessment for Individual Learners

With reference to the last point in the above list, Killen (1996:9) cautions that it is important for Educators to “find ways for students to succeed” as success is a highly motivating factor which results in achieving more success in the future. He challenges Educators to make this paradigm shift with the change to OBE as continuing to target education at the faceless masses without consideration of individual differences will not achieve the required degree of change. This is reiterated by both Gouws (2007:61) and Muncy (2006:301) who urge Educators to align with the redefinition of intelligence (by psychologists like Gardner and Steinberg) to include a learner’s ability to be successful within their own societal context.

One of the important premises underlying the OBE system is recognising the individuality of the learner, through creating expanded opportunities to accommodate their needs (Spady 1993:16). Although class control and teaching is easier when aimed at groups doing the same thing at the same time; the needs, aptitudes, moods and approaches of each individual is different and successful education has at its very core the addressing of these needs. Gouws (2007:60) proposes that one way to address this challenge is by applying the MI (Multiple Intelligence) Theory in the class which will also have the benefit of motivating learners to achieve their potential. However, a complicating factor is that the discipline problems of society also spill over into the classroom (Mwamwenda 2004:280) and affect both individual learners and the class as a whole. How Educators cope with these issues, as well as the needs of LSEN (Learners with Special Educational Needs - which includes both remedial and those at the top end of the spectrum) in a multi-cultural, multi-lingual and multiple-ability class, is going to be a crucial factor in the success or failure of implementing OBE.

In order to understand the concept of individualising assessment for individual learners within in the South African context, it is important to elaborate on some basic aspects which will be discussed in more detail in the following sections:

- Multiple Intelligence Theory
- The South African cultural (and language) context
- The role of technology

3.3.4.1 Multiple Intelligence (MI) Theory

If OBE is going to accommodate the individual needs of learners, it is important to have a system for identifying those differences. As mentioned previously, Howard Gardner (Gouws 2007: 61; Muncy 2006:301), radically changed the way intelligence is defined by propagating the theory that intelligence is multifaceted and that by identifying the specific strength of each learner and allowing them to develop it, would lead to more effective education. According to Smith ([online] 2002,2008) the original seven categories and levels of MI which Gardner identified are amoral intelligences (that is, they could be put to constructive or destructive use).

Gardner's original seven intelligences (Smith [online] 2002,2008) are:

- i. **Linguistic Intelligence** – an affinity for languages, including the ability to understand, learn and express oneself eloquently.
- ii. **Logical-Mathematical Intelligence** – the ability to analyse problems logically, excel at mathematical operations and scientific investigations.
- iii. **Spatial Intelligence** – the ability to recognise and work with open spaces and the potential use of confined areas.
- iv. **Musical Intelligence** – the ability to understand and work with musical pitches, tones and rhythms.
- v. **Bodily-Kinaesthetic Intelligence** – this includes the use of both mental and physical abilities to coordinate and use the body or parts of the body to solve problems.
- vi. **Intrapersonal Intelligence** – the capacity to understand and be comfortable with oneself, and within oneself.
- vii. **Interpersonal Intelligence** – the ability to understand and work with the intentions, motivations and desires of others.

In later years he (Gardner) added: (Gouws 2007: 63)

- viii. **Naturalist Intelligence** - the ability to categorise and interpret the environment, which is often linked to a cultural context.
- ix. **Existential Intelligence** - the concern with ultimate issues.

Gardner has subsequently alluded to the following as further possibilities (Smith [online] 2002, 2008), but does not feel that there is enough evidence as yet for them to stand as separate entities:

- x. **Spiritual Intelligence** – this entails the quest around spirituality, but it is difficult to define the content of spirituality, or the concept of truth.
- xi. **Moral Intelligence** – In Gardner’s own words: “the concern with those rules, behaviours and attitudes that govern the sanctity of life” (Smith [online] 2002, 2008).

MI theory pre-supposes that:

- i. It is not an EXCLUSIVE process, but an INCLUSIVE one (i.e. looking for the strengths within EACH learner, not the exceptional gifts in some learners).
- ii. Intelligence is a dynamic process of multiple abilities (Leaf 2001:13). As dendrites continually grow and change in response to new information, new pathways are forged and memories recorded. It can be said that the brain is the only organ that improves with age – much like a bottle of good red wine!

MI theory has been applied and interpreted in many different ways, from elitist training (such as specialised coaching for sports or music protégés – mostly as an extra-mural, not in integrated education) to programmes that provide special stimulation and extension for individual learners, such as Radford House: (Radford [online] 2008) a small, private primary school in Johannesburg which caters specifically for individualised tuition. These opportunities, however, are not available to all learners, so in the broader framework of education, it is necessary to develop systems where each learner’s individual strengths are incorporated into the daily routine of the classroom (Gouws in Dreyer 2008:68), giving them the opportunity to grow and develop as individuals for the good of themselves; their peers and eventually, the economy as a whole.

For the majority of learners, individualised testing would help them to identify their own unique strength(s) and give them the opportunity to develop those into a career or hobby. For the truly 'Gifted', it would enable them to develop an exceptional talent which may play an important role for the good of humankind. Gouws (2007:72) raises cause for concern around the issue that not all Educators have been trained to implement MI theory in the classroom and that this issue should be addressed under the new OBE system.

Spady (1993:17) himself states that the current resurgence of interest in learning and teaching styles is creating an immense opportunity to apply the principles of OBE by looking at the individuality of learners' abilities. Dryden and Vos (2005:140) refer to this as a 'talent revolution' and emphasise the importance of allowing individual learners to discover and develop their unique talents. Muncy (2006:303) also pleads the fact that the old teaching methods of lecturing in class were most suited to the mathematically, logically or linguistically orientated learners, but that OBE opens opportunities for other learners to succeed. The OBE approach to broad-based assessment allows other learners an opportunity to succeed in their area of strength, which Gouws (2007:63) explains should be a celebration of our diversity, instead of trying to enforce conformity. Another aspect to keep in mind is that learners not only differ in ability and personality, but also have their own learning styles and learn at different speeds (Kruger 1992:143).

Ivcevic, Brackett, Mayer (2007:199) also discusses the concept of emotional creativity (EC), and stresses that it requires different mental abilities to that of intelligence. This affects the way learners will interact with learning, so the creative learner should be given the opportunity to be assessed on their point of strength – for example, building models, designing websites or doing role-plays.

It is also essential not to confuse the complex concept of MI with that of a simple IQ score, which is far too limiting. The concept of MI encompasses a far greater combination of skills, abilities and talents than was previously acknowledged, which Gardner's theory of Intelligences was the first to identify (Gouws 2007:61) and name the original seven types.

Dryden and Vos (2005:176) emphasise this difference by quoting Goleman (author of 'Emotional Intelligence') who maintains that: "At best, IQ contributes about 20 percent to the factors that determine life success, which leaves 80 percent to other forces: forces grouped (together) as *emotional intelligence*" (EQ).

MI theory also relates to the work of Jean Piaget, born in 1896 (Boeree [online] 2006) and doing most of his pioneering work in the early 1900's, who – like Gardner - was also ahead of his time with his cognitive theories which are only now truly being applied in the classroom with the advent of OBE. According to Piaget's theory (quoted in Mwamwenda 2004:84) each learner must be seen within their own life-world – a unique interpretation of their own educational and social realities, which includes both their culture and past experiences as well as the way they feel about the input from the world around them. It explains why a gift or talent to one person may be totally disregarded by another (Gouws in Dreyer 2008:69). For example, a highly musical boy in a conservative western society where he is expected to do more "manly" things. In Section 3.3.4.2 the researcher will look in more detail at the cultural context of education within South Africa.

3.3.4.1.1 Applying Multiple Intelligence (MI) Theory to OBE Assessment

Gouws (2007:65) states that it is obvious that learners have differing combinations of Intelligences, and in varying strengths. Some people are born with exceptional abilities, but without the opportunity of nurturing talent, it may never come to fruition. Others attain their distinction mainly through hard work, but the innate ability must be there to some degree to start with. Mwamwenda (2004:252) sums it up well: "Hereditary sets the potential, while environment determines the extent to which it is fulfilled". The reality is that it is the role of Educators to work with the learner's potential: Take a child, identify what abilities are there and provide the opportunity, encouragement and vision for him/her to fulfil his/her potential by providing a range of assessments which would give each learner the opportunity to excel in individual areas of strength.

MI, according to Gouws (2007:68) therefore provides a framework within which Educators can facilitate learning within the curriculum. This demands creativity in all aspects of teaching, learning and assessment. Al-Balhan (2006:26) stresses that it is essential for the Educators to be aware of their own learning styles in order to understand how they transmit information, and how that affects the learners who are receiving that information. He emphasises that it is easier to address learning needs if there is an understanding that “there are many ways to be smart” (Al-Balhan 2006:19).

One of the most overlooked aspects of individualising assessment has been the issue of time. Spady (1993:5) stresses the fact that some learners take longer to reach a level of achievement and says that “Real outcomes of school are not about time”. The Dutch are currently doing pilot studies in their national education department to incorporate flexible examinations (Béguin, Kremers, & Alberts 2008) based on flexibility of time, place and format in order to accommodate individual learners’ needs.

3.3.4.1.2 Problems Experienced by Learners with Specific Intelligences in Classroom Situations

As discussed above, the reality is that lessons are often still targeted at the quiet, academic learner (a profile far more often suited to girls than boys!), and learners with other intelligences spend most of the time (between Grade 0 and 12) feeling like square pegs in round holes.

Learners with different types of intelligences react differently to the traditional type of Educator-orientated teaching which is still so prevalent in schools: (Leaf 2001: 10-13):

- i. **Linguistic** – these learners will have the need to speak and communicate constantly, and will often be writing and passing notes instead of concentrating on the lesson.

- ii. **Logical-Mathematical** – these learners will be good at problem solving, and understand a new concept quickly in Mathematics or other related subjects like Accountancy and Science, which means they will get irritated when the Educator has to re-explain or do multiple examples. They tend to get restless and fidgety.
- iii. **Visual/Spatial** – these learners think and learn in visual formats such as pictures, graphs and diagrams and can easily be lost or bored in a purely verbal lesson. They may be constantly drawing or doodling in their books, and can get so caught up in designs and patterns that the lesson passes right over them. They also tend to be daydreamers, so they battle to focus their attention on the here and now.
- iv. **Musical** – These learners tends to drum incessantly when forced to sit still, or hum and sing under their breath. Without realising it, they often get louder or can burst forth into song at the most inappropriate times.
- v. **Bodily-Kinaesthetic** – These learners are the most restless of all. They need to move, and if they are sitting in front of, or within the line of vision of other learners, they are very disruptive. These are the ‘chair-swingers’ or ‘book-spinners’, which play with their stationery and hair as well as anything else they can lay their hands on. They often ask to go to the bathroom and will be the first to volunteer for errands.
- vi. **Intrapersonal** – These learners are the least disruptive in the class situation. They are more introspective and may daydream or be lost in their own world, rather than disturbing others.
- vii. **Interpersonal** – These learners are ‘the socialites’, the constant talkers who cannot avoid becoming involved in whatever is happening in the class, even if it is an argument they have nothing to with at the other end of the room. Many of them also feel the urge to constantly make comments about others in class.

Leaf does not extend her discussion to the two new intelligences, but **the researcher** has found these learners to interact in the following ways in the classroom:

- viii. **Naturalist Intelligence** - These learners' awareness of the physical and cultural environment will often lead them to applying these contexts to all aspects of lessons, questioning historical decisions, economic happenings and the actions of past generations which are negatively affecting the present and the future of the planet we live on.
- ix. **Existential Intelligence** – These learners are the thinkers, often very right-brained and concerned with the 'bigger picture' aspects of learning and living. They will debate issues at global or even universal level, and often touch on morality and spirituality in the process.

3.3.4.1.3 Applying Multiple Intelligence Theory to Business Studies Learners

The concept of business, in itself, is multi-faceted and multi-dimensional. No business is run without input on various levels, and from a variety of sources. In addition, the way in which that input is synthesised and applied in the real world is going to have an effect on the success or failure of the business as a whole (Meyer, Topper & Russell 2009:96).

In the same way, (and as discussed in chapter 2, section 2.5) the Business Studies learner is a complex individual, bringing to class a range of potential in skills, knowledge, experiences, cultures, priorities, attitudes and values, all of which will impact on the way they interact with the subject matter.

3.3.4.2 Assessing Within the South African Cultural and Language Contexts

South Africa is a complex and diverse society: Van Niekerk and Killen (2000:91) state that it is essential to include the historical and cultural roots of a society in the design of an educational offering as these provide the context for learning. They go further to warn that forced integration, against cultural norms, is tantamount to using education as 'an instrument of oppression instead of liberation'. Both Gardner and Sternberg also supported the notion of intelligence as both a biological issue and something which is valued within a particular cultural context (Muncy 2006:302).

The solution to this, according to Gouws (2007:73), is to educate learners to think creatively, critically and independently in order to face the unique challenges facing South Africa in the future.

3.3.4.2.1 African Culture Versus Western Culture

Gouws quotes Gardner (in Dreyer 2008:67) when he pointed out that multiple intelligences are culturally defined and the emphasis or nurturing of a specific talent only happens when it is a gift which is valued in that specific culture. Mda (2000a:55) also discusses the socio-economic aspect which influences many of the PDI (Previously Disadvantaged Individuals) in South African schools. He observes that most of these previously unique cultures are now changing irrevocably under Eurocentric influence. This is causing disparity within the home (Kokot 1992:166) where the older generation is holding onto the very traditions that the younger ones are spurning. An added burden, according to the Education White Paper 4 (Republic of South Africa Government Gazette 1998:21) is the political legacy of Apartheid education and the inequalities which were the reality of many of the current non-white adult citizens of South Africa.

However, although OBE is a unique opportunity to restructure the educational offering to the learners of the future, it is also imperative that Educators step out and start looking at addressing the needs of the multitude of 'African' learners in their classes who are being exposed to a largely westernised society.

It is essential to incorporate elements from their rich past too, and allow them to maintain important aspects of their culture, even for the minority groups. Mwamwenda (2004:322) summarises the work of various authors in giving some examples of this African uniqueness: The ability to celebrate the present moment; the commitment to community ('Ubuntu') and the submission to tradition as well as the process of consulting the wisdom of elders in important decisions.

3.3.4.2 Educational Needs of African Learners

Particular concern is raised by Van Niekerk and Killen (2000:91) regarding the difficulties in introducing OBE in South Africa and the feeling of despair amongst Educators because of the complexity and diversity of society, but they also quote Spady (in Van Niekerk & Killen 2000:93) - as the father of OBE - who cautions that it is important for OBE to be contextualised to a specific learning situation. Even the Ministry of Education (Republic of South Africa Government Gazette. 1998:21 & 23) acknowledges that schools operate within a 'distinctive constituency' and play an important socialising role based on the cultural heritage of the participants.

Professor Tuntufye Mwamwenda who was born in Tanzania; attended school in Uganda and completed his tertiary studies in the USA, is currently Director of Long Island University in Durban and is one of the few experts on the effects of educating African children. He states (Mwamwenda 2004:103) that the culture and needs of African children are diverse and often different to those of the decision-makers in government who have westernised concepts. Kokot (1992:68) also questions the relevance of imposing western educational models on a third world setting. She cautions specifically against aptitude testing and the subsequent classification of African learners who often underachieve on these tests due to language and cultural barriers. Her plea is for further research to develop an understanding of cognitive patterns and learning styles within the cultural context of African learners. The development of appropriate instruments, strategies and training for Educators are also required in this regard.

Nel and Wilkinson (2008:153) address the importance of being aware of culturally diverse learners, especially during group-work and when using technology where historically more privileged learners may be advantaged. Clark and Starr (1991:357) also warn that Educators need to be sensitive to cultural differences in order to be successful at teaching. Mwamwenda (2004:402), who highlights the plight of African learners in Western schools, paints a fascinating picture regarding the differences between the ways in which various tribes rear their children, and how that affects their socialisation in the way they communicate; relate to adults and outsiders, and their education. He also goes on to look at the characteristics of an 'African personality' (Mwamwenda 2004:322) and the influence of a third-world, multi-cultural continent which is rich in natural resources and often exploited by the first world countries. Mda (2000a:54) in turn states that ideal integration in schooling would mean the assimilation of learners, Educators, and governing bodies' cultural diversity.

It would be interesting to know how many Educators in South African schools even know the ethnic backgrounds of their black learners, much less understand their specific needs.

3.3.4.2.3 The Issue of Language Within the South African Educational Context

The South African Constitution (1996:8), in the Bill of Rights, Section 30 and 31 emphatically states that everyone has the right to the language and culture of their choice, provided it is not inconsistent with other rights in the Constitution.

However, those rights notwithstanding, in a new democracy with 11 official languages (which also acknowledges the additional right to use Sign Language and Braille) it is a far more complex issue on a practical level. Initially, Afrikaans, which is seen as the language of Apartheid and oppression, was a very controversial inclusion, (Brink et al 2008:256) but it is spoken by a large percentage of South Africans. Mwamwenda (2004:152) cautions that there must be compromise on all sides: early mother-tongue instruction is important, but logistics and the value of an international language such as English make it more practical to standardise and use limited resources for other needs.

Language is the means through which learning is acquired (Mda 2000b:156) and an inability to communicate often hinders a learner's educational progress. On its most simple level, introducing the new educational system into a multicultural society starts with a language problem: if learners do not understand the teaching, or what the assessment is requiring them to do, then they are not being given a fair chance to succeed. It is interesting that Clark & Starr (1991:366) note a similar problem with the large number of immigrants in cities like New York who do not have English as a home language. Van Niekerk and Killen (2000:92) also emphasise the importance of language as it is the essential tool that enables learners both to communicate and to make sense of their life-worlds. The lack of linguistic understanding, therefore, can be a true 'barrier to learning'.

Mother tongue education has been debated heatedly in South Africa for as long as education has been around: it contributed to the political issues relating to Apartheid and in the 16 June 1976 riots in Orlando with Sowetan black learners refusing to be taught in Afrikaans (Soweto [online] 2008).

Van Niekerk and Killen (2000:92) also make a valid observation when noting that the countries that spearheaded OBE (United Kingdom, Australia and the United States) are all largely mono-linguistic countries which may account for some of the reasons that OBE terminology is so complicated, and why it has been more difficult to introduce smoothly into the South African schooling system.

In conclusion, it is imperative that South African Educators become more familiar with the cultures and languages of their learners, as there is a rich heritage of African history and knowledge which is currently being undermined by the overwhelmingly Eurocentric form of education favoured by schools.

3.3.4.4 The Role of Technology in Assessment in South Africa

Assessment in the 21st century cannot be separated from technology, but Barnes (1999:47) states that although technology has permeated all aspects of the world, it is still to a great extent compartmentalised in schools.

This means that learners are not being adequately prepared for the technological challenges they will have to face in life. Spady himself cautions that education should not be limited to the system of the past, but that it should embrace the 'Information Age' as a new option that can add to the breadth and depth of learning (Spady in Van Niekerk & Killen 2000:94) and assessment.

Clark & Starr (1991:392) list the following as possible uses for computers within the classroom: the learning of content, drill-and-practice techniques, the development of thinking, problem-solving and intellectual skills, and the application to assessment through recording and reporting. In addition, SRI (Short Response Items) such as multiple-choice and true/false questions lend themselves to direct assessment by computer (IEB 2008f:3) which is fast, reliable and non-labour intensive.

The Netherlands are experimenting with a system called IMEX (ICT – Information and Computer Technology - and **M**ultimedia **E**Xams) which involves a combination of computer and paper-based exams, for example, showing video clips during the examination, or allowing some questions to be answered online (Béguin, Kremers, & Alberts 2008).

3.3.4.4.1 Administrative technology

The increase in the use of technology within schools is a mixed blessing in the way assessment is done, recorded and reported on in many schools. From the comfort zone of handwritten markbooks, reports and tests – with typists to do the rest – assessment has now moved to everything being computerised with Educators producing their own tasks and examinations: adding the burden of typing, editing and collating to already overburdened staff. However, mastering aspects such as CIA (Classical Item Analysis) opens a broad scope of assessment possibilities for statistically analysing questions, parts of questions, responses and the effectiveness of a particular question within the context of the assessment where it was placed (Visser 2008:1).

The process of becoming computerised has also not been an easy one: Educators must be trained and re-trained as systems change or new programs are introduced. This is required for the recording of assessment data, both on the level of basic computer literacy – such as obtaining an ICDL (International Computer Drivers Licence which some schools require); changing from Word 2003 to Word 2007 and for more sophisticated applications such as administrative programmes like 'Pencil Box' or 'Eduadmin' which manage school databases in order to generate reports and other supporting documentation.

Assessment data is further compromised by issues such as computer crashes, viruses and a myriad of other technologically-related problems which require, and sophisticated back-up systems need to be in place. Overloaded servers when everyone is doing reports have on many occasions resulted in a shut-down just when deadlines are at their tightest, and tension is running high. In addition, the recent Eskom load-shedding problems mean schools now need contingency plans for potential black-outs during school time.

3.3.4.4.2 Subject Specific Technology in Assessment

One of the most basic premises of Human Resource Management is using the strengths of your staff to its best advantage, but many Educators go into education as a career because they want to teach and the passion for their subject is not necessarily matched with technological ability. Yet increasingly the curriculums are demanding technological input. In subjects such as Accounting and Geography, the technology component is becoming increasingly mandatory for schools who want to maintain a competitive edge for example, Computer Accounting from Grade 11 level and GIS (Geographic Information Systems) replacing map work as a practical component.

For most subjects (including Business Studies), compulsory research by inference requires Educators to understand the internet and computer applications in order to set and assess tasks. More technologically-enabled learners also provide an ideal opportunity for Educators to assess them on a level at which they are comfortable.

In addition, for virtually every subject there are computer applications and programs to make life easier and more interesting, ranging from Mathematical and English Reading Laboratories, to Science and Business simulations, and virtual lessons.

In the end, together with the pressures of changing to the new system and keeping up to date with their own subject matter, Educators are also expected to keep training and adapting to a number of computer applications, both in general and specific to their subjects. Principals are also very aware of the competitive edge which schools have if they are using up-to-date technology and with the current trend in niche-marketing schools' there is a constant drive to stay at the cutting edge.

3.3.4.4.3 Technologically Advanced Hardware in the Classroom

It is however, impossible to implement technology-based assessment methods without the necessary hard- and software in the classroom. In the schools of the 21st century, blackboards and chalk are becoming increasingly rare, with whiteboards now overwhelmingly popular in all but the poorest schools.

Over the past few years many schools have also moved from basic technology such as overhead projectors to television, video and even DVD to enhance lessons; do listening assessments and even practical situational analysis type testing. At present, education is entering the age of the Interactive Whiteboard, or 'SMART Board' - the first one introduced by SMART Technologies in 1991 - but the name has become synonymous with the technology and is now used generically, even for other makes (SMART [online] 2008) and related technology.



Figure 3.2 SMART Technology in the classroom

Source: St Mary's [online] 2008

Interactive or 'SMART' Boards are large interactive computer screens which enable an Educator to download from and upload to a computer, making the access to information endless. Video-clips, extracts, drawings and any information in cyberspace is available at the click of a button, (SMART [online] 2008) with the more advanced versions including touch-pads that allow learners to interact with the board to complete calculations, fill in answers and add to mind-maps without leaving their seats. It allows more than one class to see the same information, and can even permit a learner at home who is ill, to log on to what the class is doing. However, very few schools can afford a 'SMART Board' in every class and most schools that have installed them, have done so in central locations that Educators can book for specific lessons. Most importantly this technology prepares learners for the realities of the working world (St Mary's [online] 2008) by making them comfortable with that which is becoming standard in the business world.

Predictably, the problem regarding the exclusivity and cost of this technology has been addressed and the latest innovation is a generic version of the interactive whiteboard which requires far less capital outlay: with a laptop or computer and an LP Projector, the Mimio – an electronic 2.4 GHz DSSS (Direct Sequence Spread Spectrum) component (Mimio [online] 2008) - turns a regular whiteboard into an interactive whiteboard by attaching the DSSS to the side of the board, enabling information to be sent to and from the computer.

Once again, this entails more training and keeping abreast of innovations and changes to the systems and programs, but it opens up a world of alternative assessment opportunities at a far more affordable price.



Figure 3.3 MIMIO Technology in the classroom

Source: (Mimio [online] 2008)

St John's College uses a system of 'Mobile Internet Laboratories' which consists of trolleys which house Apple iBooks that can be wheeled to any class on request. The Educator can then download the information and allow the learners to work online using wireless internet connections. Boarders can book these for use during the afternoons and weekends (Lou 2008). This is far more cost-effective than building additional computer laboratories.

Clark & Starr (1991:400) point out the importance of having compatible software to the technology being used in the class. In order to adequately prepare learners for the outside world, it is also crucial to update software regularly.

McWilliams (2008) cautions Educators to be aware of the fact that learners are increasingly techno-savvy and if technology is not embraced in the classroom, education will be seen by the learners of today as increasingly irrelevant. She encourages Educators to use large-scale technology as discussed above, but also to permit learners to use laptops or even cell phones to capture their attention by allowing them to:

- SMS answers in a pop-quiz
- listen to music during class work to aid concentration
- photograph an example on the board which can be downloaded later
- have a group discussion in class on MXit

Dryden and Vos (2005:88) also question how many Educators are in touch with the technology their learners are comfortable with, and go so far as to ask a very poignant question: "When students can download 15 000 tunes from the Web on to their iPod(s)... can lessons on demand and "school in a pocket" be far behind?"

3.3.5 Ethical Considerations in Education

No school or workplace in the 21st century can operate without due consideration of ethical issues. Ethics is defined as a set of moral values or principles (Ethics [online] 2008) which guides both the actions of individuals and corporations. This is achieved through the use of tools such as Codes of Ethics (statements of beliefs and principles) and Codes of Conduct (statements on how to behave within the Code of Ethics). Ethics is studied on two levels (Meyer, Topper & Russell 2009a:26):

- **Substantive or normative ethics** which asks the question: 'What is the right thing to do?'
- **Meta-ethics** which asks: 'How will I know what is the right thing to do?'

Ethical theories abound and people's beliefs are grounded in their culture, religion, upbringing and personal preferences. Ethics therefore, is a broad and highly philosophical field of study. All ethics, however, stem from two basic concepts:

Moral Absolutism which believes that there are non-negotiable standards against which morals are defined where societal or cultural influences have no effect, i.e. there is only one right solution to any problem (Moral Absolutism [online] 2008).

Moral Relativism which believes that morals and values are culturally based, not absolute and that the solution to the problem can depend on the situation at hand. (Moral Relativism [online] 2008).

Few professionals have an impact on the ethics and morals of society as much as Educators who are role models to the next generation and whose words and deeds are constantly watched. Isaacs (2008) – who is Executive Officer of SAQA - stresses the importance of teaching learners to become 'ethical beings' in both their private and professional capacities as it enables moral growth; the development of their characters and their contribution to society. It is no longer adequate to set a good example: the NCS in many subjects now addresses ethical issues. For example, AS12.3.2 in Business Studies (See **Appendix B:14**) as ethics is an underlying thread in all aspects of business.

A discussion on technology in the classroom would also not be complete without mentioning the ethical considerations required to use technology meaningfully and responsibly: these advancements have made access to information, plagiarism and industrial espionage far more possible.

Such ethical considerations include:

- Using legitimate software, and avoiding piracy (Clark & Starr 1991:400)
- Assessing both the standard and suitability of programs to the intended use for a specific groups of learners (Clark & Starr 1991:401)
- Teaching learners proper research methods and how to avoid plagiarism (Meyer, Topper & Russell 2009b: 40).

3.4 The Role of the IEB in South African Education and Assessment

The IEB is one of only two private (independent) assessment bodies operating in Southern Africa which are Quality Assured and accredited by Umalusi. The other one is the BCVO 'Beweging vir Christelike Volkseie Onderwys', an organisation which governs and examines schools with a strong Afrikaans Christian focus (Umalusi 2005:3).

The Ministry of Education acknowledges that private providers of education are key players in providing FET education, especially as they are more sensitive to the needs of both the learners and the demands of the labour market (Republic of South Africa Government Gazette. 1998:28).

This is in line with the South African Constitution (1996:8), where the Bill of Rights, Section 29 gives the right to independent institutions to provide education, provided they:

- Do not discriminate on the basis of race
- Are registered with the State
- Maintain acceptable standards which are not inferior to those of comparable public institution

3.4.1 Brief History of the IEB

The IEB was originally started as the first multi-racial examination board in SA. It continues to be at the forefront of new developments, spearheading much of the research and developing materials which are OBE compliant and used by schools in both the public and private sector. It has maintained a non-discriminatory policy since its inception, as well as being a strong voice in lobbying for equal education for all at every opportunity.

Sadly, despite this crucial role, the IEB's history is poorly documented. The following brief history was taken from an interview with Mrs Ros Janisch, retired Language Assessment Specialist, who was involved in the birth and development of the IEB. She is currently (2008) still doing contract and specialist work for them.

As early as 1988, there was talk of closing the JMB (Joint Matriculation Board) which at the time was administering Matriculation examinations for several of the private schools in South Africa (King & Van Den Berg 1993:190). At that stage, private schools were limited to traditional, exclusive schools such as Michaelhouse, Redhill and Bishops, many of whom had their roots in traditional churches.

The Natal and Western Cape schools were quite happy to integrate with their respective Departments of Education, both of which maintained acceptably high standards and had good reputations. The Transvaal private schools, however, were not happy with the standards at the TED (Transvaal Education Department). One school in particular – St Barnabas – faced a dilemma because as a Coloured school, they could not register with the whites-only TED, and under Apartheid, the quality of the Coloured Educational Departments were inferior due to the political racial issues and lack of funding from the government of the time. In August 1987, a joint meeting of all interested parties, held at St Barnabas, paved the way for the establishment of the IEB as a Section 21 Company in June 1988 (King & Van Den Berg 1993:192).

Mr. Michael Cork (then Headmaster at St Barnabas) and Mrs. Dodo Pitt (Headmistress of St Mary's, who was a pioneer of multiracial and integrated education), approached other heads of private schools to establish a new assessment body. Originally buy-in was limited, and time was running out as the JMB was administering their final batch of Matriculants in 1992. Their breakthrough came when Mrs. Leonie Hulk (the Headmistress of The Wykeham Collegiate and Chairperson of the Heads of Schools' Society), with the support of Mr. Clive Talbot (who had years of experience in the Natal Education Department), rallied support from enough schools to make it a viable option. Mr. Cork became the first Chairman of the IEB Board (King & Van Den Berg 1993:193).

The IEB was officially started in 1990, operating from a house in Orange Grove, by administering standardisation tests for the Grade nines of that year, who would be their first matriculation group in 1993. In order to get a broader and more representative database, these tests were offered to government schools of differing demographics and in various geographic locations.

Many of these schools later became IEB members, and those early tests have developed into the Grade nine Core Skills Tests which are still run and administered by the IEB (2008:7). These have played an important role in the capturing of baseline data for the 2008 Grade 12s, as the statistics from previous matriculation groups will not be valid for comparison.

Simultaneously, Mrs. Melissa King started the ABET (Adult Basic Education and Training) arm of the IEB, with funding from a German Company called GTZ, which is currently (2008) still providing funding for this initiative.

The volatility in the country caused by the dramatic political change from Apartheid to democracy in the early 1990's, (King & Van Den Berg 1993:196) also led to the establishment of a new, middle-class type of private school. Although many of these had specific religious affiliations, most of them were community based and did not provide boarding facilities. Unlike the traditional, upper-class private schools, this new breed of educational institution was targeting the middle income group who were experiencing problems with the public Model C schools that were becoming overcrowded and suffering from lack of funding which resulted in standards deteriorating.

The first batch of IEB candidates wrote their matriculation examinations in 1993 with Mrs. Dodo Pitt as the first head of IEB. Assessment specialists such as Mrs. Ros Janisch for languages, Mrs. Jill Adler for Mathematics and Mrs. Karen Brody (ex-headmistress of Sacred Heart College) for other subjects, set and monitored the standards on behalf of the IEB.

For the first few years, marking and administration was done at the house in Orange Grove. From the start, they used their expertise and resources to assist the public education sector. One of their first projects was ongoing training and assistance for the Northern Transvaal schools where standards were particularly low and pass-marks dismal.

3.4.2 Current Position of IEB

In April 2003, the IEB offices were moved to the current premises in Houghton under the leadership of Mrs Lyn Scott, who took over as CEO in 1993 (IEB 2007:3).

In an address to parents at Bridge House School in November 2006, Mrs Lyn Scott (Scott [online] 2006) summed up the current position of the IEB as follows: "The IEB is a dynamic, client-centred organisation which maintains standards, produces reliable results and most importantly ensures a good correlation between results and real ability as an indicator for future study. In 2005, there were 6 763 candidates from 149 independent schools in South Africa who wrote the IEB matriculation examinations; 98.1 % passed and 78.3% achieved matriculation endorsement. It is interesting to note that in Gauteng and Natal, the vast majority of independent schools belong to the IEB. The answer to the future is not simply to increase the amount of education, but to educate people differently - IEB assessment shows the way."

In May 2007, Mrs Anne Oberholzer took over as CEO, taking on the immense responsibility of guiding the IEB into the new dispensation with OBE (IEB 2007:1).

The IEB works in conjunction with ISASA (Independent Schools Association of South Africa) which, with 715 member schools, is the largest association of independent schools in the Southern African region (ISASA [online] 2008). ISASA is, however, not an examination body, and members have to write either the IEB or public examinations.

3.4.3 Contribution of the IEB to Assessment in SA

With its poignant logo of “Assessment Matters”, the IEB is deeply entrenched in the school education system in Southern Africa.



Source: IEB [online] 2008

Some of the distinctive achievements of the IEB in its short history have been:

- The introduction of the first cross-curricular testing at Grade 9 level in 1998, which has evolved into the current Core Skills Tests and which are written in both private and public schools.
- To be appointed as the official assessment agency responsible for all the non-official languages (such as – amongst – others: French, Hebrew, Hindi and Arabic) at FET level for both DoE and IEB schools for 2008 and 2009 (IEB 2007:17).
- To be responsible for assessing other smaller subjects such as Equine Studies, Nautical Science and Maritime Economics on behalf of the state (IEB 2008d:7).
- Pioneering examinations in multiple languages which enabled learners to answer parts of an examination in their home language, irrespective of what that may be. The object of this was to remove the language barrier which often disadvantages learners who are not being educated in their home language. The downside of this was getting translators for the marking, but the cost and effort was deemed to be worth the educational benefit gained.

- In 2008, taking on the setting and administration of the DoE CTAs (Common Task Assessments) for Grade 9s, as a precursor to Grade 9 becoming an exit level examination. Although these are still marked at school level, it does introduce a measure of quality control when the tasks and marking guidelines are of a high standard.
- Working with the DoE in partnership on key committees such as the IPEC (Inter-Provincial Examinations Committee), and the CMC (Curriculum Management Committee) in order to manage the diversity of education in South Africa (IEB 2008d:7).
- Becoming a recognised ABET (Adult Basic Education and Training) assessment body which is impacting industry in South Africa.

3.4.4 Quality Assurance of the IEB

The Government Gazette (1998:10) acknowledges that best practice has proved that quality is driven from within organisations and institutions, but, according to the SAQA Act (Act No.58 of 1995) it requires external validation. In 2005 Umalusi conducted a formal evaluation of all assessment bodies under its jurisdiction, with the view to improving their standards for accreditation and comparison. This process was to establish a benchmark against which to monitor development and improvements for the future (Umalusi 2005:6). This was done through both self-evaluation and site visits which tracked a common paper (Business Economics (SG) Standard Grade 2004) through the process of setting, moderating, administering and marking as well as the handling of irregularities in each of the assessment bodies.

For the IEB, the Business Economics SG examiner was Mr. Sean Topper (who is currently – 2008 – Internal Moderator and Analytical Moderator for Business Studies in the IEB). The researcher was a **Senior Marker** on the Higher Grade Business Economics paper, but also **Gauteng Regional Representative** and therefore involved in the meetings and planning for this process.

Although the evaluation process was limited due to issues such as unrepresentative samples (one paper in one subject only), an untested evaluation instrument, inexperienced evaluators, time issues and a focus which was primarily on compliance and the integrity of the process (i.e. no standards were addressed), the report of the evaluation committee (Umalusi 2005:9) read as follows:

“...the IEB excels in managing the quality, setting and internal moderation of examination question papers. The IEB’s setting and moderation process can be used as a benchmark for the development of examination question papers of a high standard. The process ensures consistency and continuously reinforces the quality of teaching and learning.”

In the same report, only Gauteng was also given an unqualified positive report, with the BCVO, Eastern Cape, Limpopo and Mpumalanga needing urgent interventions. Other assessment bodies were acknowledged for good work, but with room for improvement.

In 2007, Umalusi conducted another evaluation, this time concentrating on the moderation of portfolios, and basing its evaluation on two subjects: Business Economics and Physics. By that stage the researcher was Business Studies **Portfolio Moderator**. Two Umalusi representatives spent four days at the marking session at St Stithians School monitoring the portfolio moderation process for which the IEB received another positive report (Nel 2008).

3.4.5 The IEB Going Forward

The IEB is growing strongly: From the 149 member schools in 2007, it boasts 159 schools that have registered learners for the 2008 examinations (Nel 2008). Of these, 2460 learners from 111 schools are writing Business Studies. It is a misconception that the IEB and DoE are in direct competition. The reality is that both Assessment bodies work closely with Umalusi to set the standards and address the problems of taking South African education into the new dispensation of OBE.

There is also a sharing of resources (such as IEB examiners co-opted to set papers for the DoE, for example grade nine CTAs) and joint brainstorming on how to solve problems such as setting Quality Assurance standards for example, the Gabriella Matters workshops held in 2007 (Matters 2007).

The IEB has always believed in the positive impact of assessment on teaching and hence Johnstone, Chairman, IEB Board of Directors (2008) states that "...learning is the backwash effect of assessment. How one asks a question leads directly to how a learner approaches answering the question; does s/he approach the issue raised in the question with an open mind, exploring and justifying different options? Or does s/he focus on the reproduction of a learnt response, as if the issue is a closed one?"

The differences between the DoE and the IEB as assessment bodies lie in two aspects:

Differing target markets. Janisch, (2008) explains it as follows: It is the difference between sailing in yacht, and steering a tanker. The tanker (DoE) is large, set in tradition, stable and on a fixed course, which is cumbersome and time consuming to change. The yacht (IEB) is more vulnerable, easier to control (it has never had a leaked examination paper) but also more flexible – able to institute change and make minor adjustments in direction on a short term basis, which makes it possible both to adapt to changing circumstances more quickly, and to try new methods and models on an experimental basis. This need for flexibility is also a philosophy underwritten by Bill Gates quoted by McWilliams (2008), when he says that it is important to try new things, but not to worry if it goes wrong - as in the current world of work, you will not be going in that direction for long anyway. In many ways the IEB is taking the initiative to change and experiment with new ideas for example grade nine cross-curricular testing (as previously discussed), and currently in developing SBA moderation instruments and introducing higher order thinking (HOT) Selected Response Item testing (University of Cape Town 2008).

The perceptions of standards at Grade 12 level. The DoE grade 12 marks are historically much higher than those of IEB candidates, with some DoE learners attempting and succeeding in getting A's for up to ten subjects, and the lists of learners getting six or seven A's are long and impressive.

On the contrary, the IEB candidates, with their more analytical question papers get fewer distinctions. This has been a controversial issue for many years to learners being admitted to selection courses at South African universities.

A group of schools which plays the distinction card to the maximum are the Crawford Colleges – a very exclusive group of schools which charges top rates for school fees but writes the DoE examinations and annually tops the lists of best achievers for the DoE. Many parents do not realise that their children are not writing the same examinations as other private schools.

3.5 Conclusion

Notwithstanding all its problems and shortcomings, in this chapter the **researcher** has looked at the fact that OBE is both an improvement on the old system, and the only option we have. The question is not whether to get rid of it, but how to contribute towards refining it as a system in order to make assessment meaningful: staying up to date with technological change, integrating OBE with the international requirements, targeting it to the individual needs of learners, and most importantly, adapting it to become a relevant and meaningful vehicle for education *within the South African context*.

The IEB is an integral part of this process, and has proven to be both willing and able to be at the forefront of change and innovation for the benefit of all learners in South Africa. As the first assessment body to spearhead integrated education in South Africa, it is now joining hands with the DoE and Umalusi, making significant strides in achieving the aims of quality and equitable education for all. The process is slow, and not without its problems, but in the arena of education changing mindsets and lives was always going to take a more than a generation.

It is also important that South Africa does not tackle these problems in isolation – many countries are experiencing similar issues, and their approaches to the problems could assist South Africa in finding solutions, such as:

- Pakistan, which has an official literacy rate of 38 percent in a country of 170 million people - most of whom live in rural settings – but are mobilising large social reform projects to address the problem (Ahsan 2008).
- Singapore, which also battles with a very diverse population and is grappling with the concept of 'Mother Tongue education versus English' is finding that the increased use of portfolio assessment assists learners to improve their marks due to the formative nature of the learning (Polly et al 2008).

It is, however, in the larger perspective of grappling with policies and planning, easy to forget about the needs of the individual: which raise the issues at the forefront of the war where the crucial battles are won and lost. We must never lose sight of the fact that education is, in the end, about individuals – their needs, multiple intelligences and the future for which the FET prepares them. In chapter four these issues will be addressed by looking at the concept of SBA (School Based Assessment), as well as problems around both the assessments and assessors, specifically relating to Business Studies as a subject.

**Chapter 4 - School Based
Assessment in Business Studies**

4.1 Introduction

In previous chapters the discussion has focused on looking at the development of education as a whole and specifically the rise and introduction of OBE (Outcomes-based Education). Within that framework, we looked specifically at the characteristics of the subject Business Studies and its place in the FET (Further Education and Training) band, as well as changes in the type of learner that is choosing Business Studies.

Chapter three makes it clear that OBE is a structured and very specific education intervention that has many requirements for correct implementation, with regard to the planning, setting, administration and evaluation of assessments. It also looked at the vital role that the IEB plays, not only within its own schools, but as a partner of the DoE and Umalusi for FET education in general. The rapid advancement of technology has also changed the way education offerings are being presented in many schools and has an impact on the way assessment is done. The greatest challenge, however, is to keep in mind the South African context as the international system needs to be adjusted in order to be viable here without degrading standards.

The aim of this chapter, therefore, is to discuss the research design in more detail, looking at the three inter-linked variables that directly affect assessment:

- i. Continuous assessment (SBA - School Based Assessment)
- ii. The role of the Educator in portfolio assessment
- iii. Assessment related issues

These variables are discussed with specific reference to Business Studies and the requirements that will need to be met by the IEB, its examination panels and Educators in setting up and monitoring School Based Assessment (SBA) in order to maintain acceptable Umalusi standards for the 25% Portfolio requirement for the grade 12 exit examinations.

In order to do this, chapter four will explore the interaction of the following variables which affect the issue at hand, as illustrated by **Figure 4.1**:

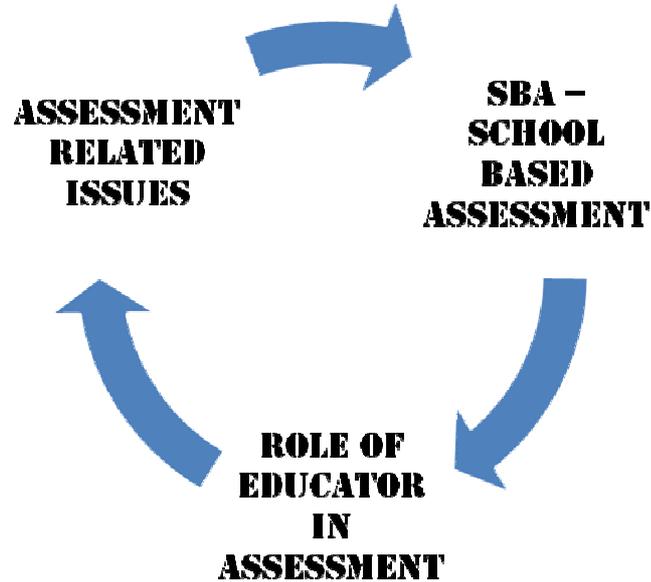


Figure 4.1 The interaction of the three assessment variables in FET teaching

4.2 Research Design

4.2.1 Research Question

How portfolio moderation is done and quality assured in order to assess the School Based Assessment of learners in the IEB writing Business Studies as an FET exit level subject, based on the requirements of the NCS, Umalusi and the IEB.

4.2.2 Research Design

4.2.2.1 Postulates

In order to investigate the assessment process, the following postulates have been set:

- i. The process of assessment is a complex and multi-faceted. It has a subjective element that needs to be acknowledged and provided for in setting up the assessment tools.
- ii. South Africa is a country in turmoil both politically and economically, and this has a direct bearing on learners, Educators and the education system.
- iii. OBE as a system is generic and there are many formats in which it has been applied to a greater or lesser extent in different countries throughout the world. It is therefore not possible to make direct comparisons with any one system in any one country.
- iv. The political, economic and educational situations in South Africa are unique:
 - It is a young democracy which has seen an immense amount of change in virtually every area of life with enormous social and economic challenges which are third world related – although there are several aspects of the economy which are first world
 - It has a multi-lingual and multi-cultural population
- v. In South Africa, the basic premise of OBE has been adopted with the implementation method of using the National Curriculum Statements with Learning Outcomes and Assessment Standards for the FET phase.
- vi.

- vii. Assessment in South Africa is under the jurisdiction of Umalusi, who is appointed by SAQA to administer standards that have to adhere to the requirements of the NQF. These are assessed through registered assessment boards. For the purpose of this research, the IEB as an assessment board will be specifically looked at.
- viii. Assessment varies considerably in different subjects - this research will specifically be looking at Business Studies at FET level.
- ix. The grade 12s of 2008 will be the first to write the new National Senior Certificate.

4.2.2.2 Purpose of the Study

Specific Aim

To do a case study on Business Studies in the IEB and record the assessment processes, documentation and quality control measures that have been instituted in order to comply with the Umalusi requirements.

Indirect Aims

The following indirect aims are also part of this research:

- To look at how assessment has changed across the two education systems from Business Economics in the old, to Business Studies in the new by means of a literature research.
- To look at the theory of SBA (School Based Assessment), by means of a literature research.
- To look at the opportunities for the future – what Business Studies can bring to the table for learners in respect of life skills as well as preparation for both tertiary study and the world of work, by means of analysing the case study.

- Neither Business Studies as a subject, nor the IEB as an assessment body is working in isolation, so any advancements or successes experienced is shared with other subjects and assessment bodies to enable the process to roll out faster and more smoothly.

4.2.2.3 Method of Research

Two methods of research have been used in this dissertation.

- Firstly, a **literature study** has been done to clarify exactly what the new education system is aiming to achieve, as well as the specific policies and programmes that have been put in place to facilitate this in South Africa. A vital part of this is also the clarification of concepts, which - in OBE - is a minefield of acronyms. Without understanding these, it is not even possible to meaningfully read articles or books on the subject.
- Secondly, a **case-study** analysing the IEB Business Studies assessment methods for 2008. These have been slowly introduced over the past few years with the introduction of portfolios, which has enabled the training of both Educators and learners about the concepts required. As such it is Qualitative Research (McMillan 1993:37):
 1. Behaviour has been observed in non-contrived conditions
 2. There has been no manipulation of conditions or experiences
 3. Data is submitted in wording and descriptions, not numbers

Participant selection was not necessary as all IEB schools that have Business Studies as a subject are automatically part of the group constituting the case study. The processes and procedures form part of the case study, not qualitative data on learner achievements.

In chapter five the **researcher** will look at the specific documents and procedures which are used by the IEB in moderating portfolios and how these address the issues of the principles of assessment (e.g. validity, rigour, reliability, fairness etc). These were developed by the examination panel for Business Studies (of which the researcher is a member in the capacity of **Portfolio Moderator**), accredited by Umalusi and implemented by the IEB.

4.2.2.4 Identifying Relationships and Variables.

The variables in this case study which have been analysed are:

- School Based Assessment: Educator set and assessed tasks which are represented by the portfolio
- Assessors: Educators in their capacity as assessors – evaluating, recording and reporting on learner achievements
- Assessments: Various types of tasks - how they are assessed and the balance of these tasks within the portfolio

4.3 School Based Assessment (SBA)

4.3.1 Introduction

In South Africa, up to and including the 2004 examination, school exit examination and promotion marks at grade 12 level meant an examination which constituted 100% of a learner's final promotion mark. This form of assessment is known as summative assessment and is used to grade learners at the end of a section (Clark & Starr 1991:433). This meant that everything - university entrance, job applications, etc - rested on the outcome of one examination session.

Summative assessment does not, however, always allow for a valid reflection of learners abilities for the following reasons (Mwamwenda 2004:350):

- Examination stress often compromises results and learners' performances do not reflect their true abilities.

- Educators often teach to the examination, losing the broader perspective of education and learning.

Other reasons include:

- Examinations test a very narrow range of skills
- Language barriers which often lead to learners not understanding the questions, even though they would be able to answer them if they did understand what was required
- Cultural barriers or bias
- Lack of examination and time management skills

Continuous Assessment (CASS), which is done through School Based Assessment (SBA) is represented by a portfolio of evidence (hereafter referred to as a portfolio, but known as a PoE in Adult Training and Assessment). It is an attempt to allow learners the opportunity to demonstrate their competence in a variety of skills through different types of tasks. According to the IEB Manual for the Moderation of School Based Assessment for the National Senior Certificate Examination (2008a:2), SBA is a fundamental part of the NCS and the calculation of the final assessment results that learners receive at this level. Currently (2008), this now counts 25% of the final promotion marks (providing it complies with certain requirements) with the examination comprising the other 75%. Umalusi does quality assurance on this through monitoring of the moderation processes and activities of the assessment bodies such as the DoE and the IEB (Umalusi [online] 2008).

Clark & Starr (1991:430) differentiate between the following concepts:

- **Assessment** is a measurement or description of a situation from an objective point of view
- **Evaluation** is putting the assessment or measurement into context and making a judgment about it.

So, for examination purposes, an achievement at Level 5 may be considered superb for one learner whereas for another it would be an under-achievement.

However, for the purpose of this research, it is not necessary to differentiate as assessment within the classroom and moderation of that assessment will always include an element of evaluation.

4.3.2 Evidence of SBA

As previously discussed, SBA occurs on an ongoing basis within the classroom and evidence is collected on both a formal and informal basis. For the purposes of external moderation, however, it is essential to have standardised portfolios which conform to preset requirements and standards that are laid down in the NCS.

Section 4.5.1 will discuss the different types of continuous assessment (SBA) that occur within this portfolio.

4.3.2.1 Portfolio Requirements

The aim of a portfolio is to display a more representative spread of a learner's skills and abilities across various tasks, thus enabling a better assessment of a learner's potential. It is therefore an open, transparent, learner-centered and fair method of recording learner progress (IEB 2004:195), which means it is vital that the balance of tasks within the portfolio is maintained. The first Department of Education discussion document (DoE 1997:31) aimed at setting the Education Policy for South Africa, however, cautioned that the portfolio must not become a mere eclectic mix of learner work samples. It must have a clear intent and purpose which is meaningfully linked to the learning programme outcomes.

A portfolio must also be of appropriate form; suitable to the age level of learners (DoE 2005b:18) and include both formative and summative assessments. This will differ between subjects, depending on the requirements of each.

Within Business Studies in the IEB, the portfolio requirements are as follows (refer to **Appendix B:1-47** for the full 2008 version):

Table 4.1 IEB Business Studies Portfolio Requirements (2008)

"PORTFOLIO	[100]
Each candidate must submit a portfolio which contains the following evidence:	
Component Weighting	
<ul style="list-style-type: none">• Primary Research Task 20%• Secondary Research Task 20%• Oral/Debate 10%• Elective 5%• Two controlled tests 20%• Midyear or preliminary examination 25%	
All these assessments must be designed in such a way that they assess across the Learning Outcomes and Assessment Standards and cater for the cognitive ability of all learners.	
Business Studies FET is a THREE year course and as such the learners should have an understanding of all terminology and aspects which form the introduction to and basis of all the Grade 12 Assessment Standards.	
C. INTERPRETATION OF THE REQUIREMENTS	
1. Examination (Not applicable to this research)	
2. Portfolio	
See Appendix B:6-9 for details on these tasks.	
Criteria for Assessing Design:	
Does Project show:	
<ul style="list-style-type: none">• Validity – task matches LOs and ASs targeted?• Sufficiency - assess across LOs?• Rigour – cover all cognitive levels in 60 Lower Order: 40 Higher Order ratio?	

- Appropriateness – appropriate for this grade/these learners (language, contexts, etc.)?
- Marking Guidelines – are these fit for purpose (appropriate tools, sufficient rigour)?
- Applied contexts – require learners to work in unrehearsed/unfamiliar contexts?

Currency of information

This is crucial in Business Studies where economic trends and other factors con-stantly change. All work should be dated to indicate time relevance.”

SOURCE: (IEB 2008c:2)

Component Weighting (from above)

The balance of tasks, requiring different skills within the portfolio is as follows:

Formative Tasks: (Comprising 55% of the portfolio)

- | | |
|----------------------------|-----|
| 1. Primary Research Task | 20% |
| 2. Secondary Research Task | 20% |
| 3. Oral/Debate | 10% |
| 4. Elective | 5% |

Summative Tasks: (Comprising 45% of the portfolio)

- | | |
|----------------------------|-----|
| 5. Two controlled tests | 20% |
| 6. Preliminary examination | 25% |

The primary research (fieldwork such as market research, surveys and needs analyses) task is done in groups and the secondary research (desk research) is done individually, thus allowing different skills to be assessed. Both the oral and the elective components are broad enough to add more dimensions, enabling the learner who battles with summative assessments to prove their abilities in other areas.

For example, the oral component can be a formal speech, PowerPoint presentation, debate or group oral. The elective may NOT be a test or examination, but could include any exercise with at least a 40% HOT (Higher Order Thinking) component: For example, business simulations, case studies and commercial games such as the JSE Schools Challenge (share trading game).

Portfolios have to be presented in the recommended formats (IEB 2008a:6), which must be neither expensive nor bulky. Both Educators and learners need to present portfolios. Provision is also made for physical evidence such as models and other assessments which cannot be stored or included in the portfolios (IEB 2008a:8) through means of photographs, plans and designs or presentation on CD (Compact Disc).

4.3.3 Reasoning for the Introduction of Portfolios

4.3.3.1 Portfolio's Scope of Tasks

As previously discussed, school based assessment allows the Educator to introduce tasks which assess different skills from those assessed by tests and examinations (IEB 2008a:2). Within Business Studies particularly, which requires a variety of business skills to be learnt and mastered, it enables the introduction of tasks such as:

- **Teamwork.** Whereas examinations are individually written, SBA often uses group work or working in pairs to teach real life skills where the learners are able to use their strengths and those of others in their group for mutual benefit. For example, one group member may do the research, another the computer work – and yet another artwork before they do a combined presentation.
- **Simulations.** Business simulations enable learners to experience different aspects of real business situations. Examples are the purchasing and control of stock, marketing, management techniques, business plan writing or whole business cycle simulations.

- **Research.** Various types of research such as primary research - research conducted with the specific aim to collect new data – (Primary Research [online] 2008), or secondary - analysing information from previously conducted research (Secondary [online] 2008) - is done, using resources such as the internet, books, newspapers, magazines, interviews, observations and questionnaires.
- **Presentations.** These can be done in written, oral or PowerPoint formats with many variations including individual work, group work, debates or role-plays.
- **Sustainability** of projects is a new concept which Business Studies Educators and learners have had to grapple with since the introduction of Social Responsibility projects. Instead of doing once-off interventions (as discussed in more detail in 2008 exemplar, chapter 5, section 5.4.3), learners are being encouraged to work on sustainable projects, handing over from one year-group to another, which enables them to do far more in-depth, meaningful work.

4.3.3.2 Portfolio's Depth of Tasks

Whereas examinations and tests are limited in time and scope, SBA can be used to extend the learners skills (IEB 2008a:3) and, as these tasks are done over a period of time, they can be scaffolded to break a complex task up into individual elements. This enables research to be done on general aspects of a theme first and then systematically narrowed down to more intense research on a specific aspect (Meyer, Topper & Russell 2009b:41). For example, first factors affecting the petrol price, then Sasol as a company within the petroleum industry and then the aspects of costing within the micro environment of Sasol.

4.3.3.3 Formative Nature of Tasks

As examinations are summative, the learner completes the entire task on their own and assessment happens at a later stage.

The formative tasks within the SBA mean that earlier intervention is possible:

- Observation during teamwork or individual tasks can be **diagnostic** (Clark & Starr 1991:49) and enable an Educator to pre-empt possible problems such as misunderstanding of instructions, learners going off on irrelevant tangents or encountering obstacles.
- **Scaffolding** of tasks enables the learners to be assessed and receive feedback at various stages of the task, which helps them to improve on those aspects before continuing with the task (Nel 2004). This is especially important as it avoids a learner being disadvantaged for the entire task due to a bad start. For example, the learner will be given an opportunity to have the research component marked and corrected before proceeding with the preparation of the presentation.
- **Flexibility** is important in larger tasks. Where tasks are being done in great depth, such as research, the focus of the study may change as data is gathered and the anticipated outcome may very well not be achieved. If this is noticed in the early stages of research, it may result in the study being adjusted so that the task can continue in a new, but viable format.

4.3.3.4 Paper Trail of Learning

The portfolio provides a paper trail of all the different aspects of the learners work over a period of time, showcasing their best work (IEB 2008a: 3). A learner may not feel well for an examination and perform poorly, but present good work over a period of time in all the other tasks which would give a better representation of their overall abilities.

LSEN (Learners with Special Education Needs) who are challenged by learning difficulties are often unfairly compromised by spelling, handwriting or time management issues in their examinations. With a portfolio, time is less of an issue and they may have the benefit of typing, using spell check or group work which would negate these issues.

4.3.3.5 Timely Intervention

Discussion with learners during the task enables an Educator to provide input, give suggestions, play devil's advocate or even get an understanding of what learner's reasoning is for doing specific things. For example in market research – learners drawing up a survey form in 'SMS' style because their target market is teenagers who would respond better to the more informal format.

4.3.3.6 Moderation Requirements

In order for portfolios to be meaningful, they need to be moderated in order to compare the standard of work for one learner and one school, to those of other learners and schools. Standards are achieved by knowing that the requirements met by learners are the same across the country and across schools, irrespective of differing situations and the individual preferences of Educators. This process is guided and monitored by Umalusi (IEB 2008a:4) and will be discussed in more detail in chapter five (section 5.6).

However, more than any other aspect of assessment, the portfolio lends itself to misuse by untrained Educators or manipulation by unscrupulous Educators, which means that the moderation process is vital in maintaining standards for the benefit of the integrity of the qualification.

4.4 The Role of the Educator in Portfolio Assessment

4.4.1 The Educator as Assessor

The importance of an Educator's role must never be underestimated as their behavior, attitudes and actions can have lasting effects on the learners they teach (Kruger 1992:157). The role of the assessor has fundamentally changed from that of 'gatekeeper' of knowledge in the old dispensation, to that of a supportive guide who paves the way for lifelong learning for all learners (SAQA 2001:5) in OBE.

Vambe (2005:289) maintains that subject experts are the hallmark of a potentially successful education system and, as the assessment of the portfolio now counts 25% of the final promotion mark (in the FET phase), it is essential that the assessment is valid, reliable and fair. (Note: In the GET phase, the portfolio counts 75% of the promotion mark.)

SAQA (South African Qualifications Authority) was tasked with setting the standards for registering assessors which became a requirement for all Educators to retrain in the new education system. The aim of this (SAQA 2001:3) is to ensure that all registered standards and qualifications across the NQF (National Qualifications Framework) are assessed consistently and fairly.

All assessment agencies and centres are expected to use assessors registered with the necessary ETQA (Education and Training Quality Assurance) bodies. (SAQA 2001:3).

4.4.2 Assessor Training

Never before in the history of education have Educators been required to retrain in order to continue with their jobs, which shows the importance the government is placing on the new role of assessment. Before OBE, previous advancements and new ideas had been introduced as pockets of innovation within specific subjects, mostly requiring on-the-job training supported by isolated courses run by outside agencies.

OBE has required an entire paradigm shift for every Educator, at every level from Foundation Phase to HET. In the new education system, education is seen as more than just the acquisition of knowledge; the mastery and application of knowledge is what is important. This is nowhere more apt than in assessor training where it is impossible to benefit from the training unless the paradigm shift is made and the new skills and methodologies are applied in teaching.

As South Africa is now in the final phase of the implementation of OBE, where the whole school curriculum has been adjusted right through to grade 12 of FET - the requirements for that change are being applied more strictly than ever before.

There is a focused drive to ensure every Educator is trained as an assessor on the generic assessment standard: 'Plan and conduct assessment of learning outcomes' as registered on 14 February 2001 (SAQA 2001:6). The South African government's initial aim to retrain all Educators by 2004 (SAQA 2001:4) did not materialise but by 2010 no grade 12 marker in the IEB will be allowed to mark the exit examinations without accreditation as an assessor (Nel 2004). Further assessment and moderation courses are also available for those Educators who want to improve their qualifications.

Up to and including 2007, schools were coerced and encouraged to follow the OBE route, but with no external examinations, many were slow in making the conversion. However with grade 12 now being assessed externally, it has become a matter of urgency as it is an external assessment and those that have not adequately prepared are facing a crisis-management situation. Refer to **Appendix C:1-3** for the Business Studies **Portfolio Moderator's** report which summarises the problems experienced in portfolios during 2007, the year preceding the first NSC examination.

Some of the tertiary institutions have been slow in adapting their courses to include OBE thinking and with the re-structuring of HET institutions which included many mergers and required the re-registration of all courses, it has led to many of them not being approved and having to be redesigned to meet SAQA requirements. This has resulted in Educators qualifying without being truly ready for the new system.

Even as early as 1997, Huddleston and Unwin (149) stressed the importance of ongoing training and lifelong learning for Educators and OBE stresses the importance of this.

4.4.3 Time Pressures Around Assessing

The thumbprint of OBE assessment is definitely administration, especially with the increased moderation requirements. There is a myriad of forms, control sheets and moderation issues which has resulted in a deluge of paperwork that is putting additional time pressures on all Educators (Huddleston & Unwin 1997:132).

In the past, Educators could set impromptu tasks and worry about marking them later. Now assessment entails setting specific criteria and having the assessment grid or rubric ready at the start of the task. For tasks such as research projects, this could be an imposing task to draw up, with rubrics often running into several pages. The requirement of transparency also means learners need to have access to these marking guidelines and the logistics of making copies is often a problem in the school environment, especially in disadvantaged schools. In addition, it is again important to remember the case made by Clark & Starr (1991:328) regarding the importance of teaching to the individual, notwithstanding all the difficulties it poses and the additional time commitment it requires from Educators to individualise assessments, or make provision for a learner to redo assessments when they are ready.

Tests and examination were also not a problem for an experienced Educator to set in the past, in a minimum amount of time. Today Educators are bogged down with the requirements of balancing the levels of questioning (Bloom's taxonomy in the case of Business Studies - refer to **Appendix B:36**) and providing a design grid (refer to **Appendix B:24**) to show in detail the Learning Outcomes and Assessment Standards covered. This has to be balanced with preset quotas across all the tasks for the year: Each task has to fit into the bigger picture and schools are requiring not only work planning schedules, but that these indicate the coverage of the curriculum and the levels of questioning too.

True OBE assessment requires both formal and informal assessment, the latter of which requires class observation and recording of a variety of aspects of each learner's behaviour, development and problematic issues. This raises complications on two levels:

- The time needed to document information on even four or five learners per lesson
- The ability to connect with and interpret the performance of quiet learners who fly below the radar and do not interact in class

4.4.4 Staff Morale

The change to OBE is requiring that Educators take their years of experience and preparation and adapt these to the degree that much has become superfluous and unusable. Changes in both content and assessment methods mean that previous tasks, tests, examination questions and worksheets have had to be discarded and re-done.

4.5 Assessment Issues

Assessment, which is the evaluation of evidence to determine whether an outcome has been achieved or not (IEB 2004:12), is based on a series of tasks where a learner's work is compared to preset standards which are administered by the relevant examination body and monitored by Umalusi.

Part of the paradigm shift in OBE has been that assessment now involves the learner in the process (IEB 2004:81), which has led to more transparency and better learning. As a result, before starting to prepare for a task, learners know what percentage of the mark will be allocated to each aspect of the task and can plan accordingly.

Under the watchful eye of Umalusi, the assessment bodies such as the DoE and the IEB have prescribed formats for each subject regarding the evidence of assessment that needs to be included in portfolios. Both bodies work from a common NCS (National Curriculum Statement), but they interpret and examine them differently (Umalusi 2005:3), providing guidelines to Educators through their individual SAG (Subject Assessment Guidelines). For the IEB these SAG's are written by the examining panel in each subject, verified by the relevant Assessment Specialist and sent to UMALUSI for ratification before they can be distributed and used as the basis for assessment.

The IEB has based their introduction of the OBE system on the Queensland model which has a 100% Portfolio (Nel 2004). In order to accomplish this, their quality control has to be superb and they have stringent moderation procedures in place to ensure that the setting of questions and tasks, as well as the distribution and use of these are properly monitored. If South Africa reaches a similar level of quality assurance for the 25% portfolio, it will bring the standard of teaching and learning to new levels of assessment.

4.5.1 Types of SBA

According to the NCS for Business Studies (DoE 2003a:34) there are FOUR main types of Continuous Assessment which are used in the classroom:

a. Diagnostic Assessment

This is done either at classroom level or by Education Psychologists to diagnose problems. In the class situation, diagnostic assessment occurs on both a formal and informal basis, in order to identify specific areas of concern. These types of test can be given to a class as a whole or to a specific learner. It is, however, essential that once the problem has been identified, that it is addressed through adapted teaching, remediation or other supporting strategies, depending on the severity of the problem.

b. Baseline Assessment

Baseline assessment is done at the start of a learning cycle where the learners are pre-tested to obtain data (or information) which can be used both for planning purposes and to compare to post-learning assessment in order to quantify the effect of the learning that has occurred.

c. Formative Assessment

Formative assessment will form the bulk of the assessment that is done at a classroom level. Formally or informally, the ongoing assessment of learners' work on a daily basis becomes part of the formative assessment (Huddleston & Unwin 1997:113). Group-work, orals, worksheets or answering questions in class are all examples of formative assessment.

With these assessments the learners have various resources at their disposal and the opportunity to ask questions and improve on their final evidence which is submitted. Formative assessment is always followed by giving feedback to the learner and in most cases contains a diagnostic element as well (Clark & Starr 1991:433).

d. Summative Assessment

Summative assessment guides the final decision as to whether or not a learner has achieved the necessary outcomes which will allow them to pass from one grade to the next, or to achieve the National Senior Certificate (Huddleston & Unwin 1997:115). These assessments are in the form of tests and examinations and are administered under controlled conditions. This normally implies that it is individual work (exceptions may include practical work such as in Life Sciences) and all resources are provided for the learner (except in certain language tasks where they are required to bring in mind-maps or research materials).

Gouws (in Dreyer 2008:56) adds that there is a fifth type of Continuous Assessment:

e. Systemic Assessment

This is assessment aimed at checking and evaluating the education system which is being used, but is done at the level of the assessment bodies - such as the 2004 Umalusi audit of all the assessment bodies, including the DoE and IEB (Umalusi 2005:3).

4.5.2 Syllabus versus Curriculum

The paradigm shift from a content-based syllabus, to the NCS (National Curriculum Statement) which is based on Learning Outcomes and Assessment Standards that include very little content, is enormous.

The more experience an Educator has, the more a syllabus which can be ticked off as completed is a comfort zone of knowing that the job is well done.

Textbooks in the old dispensation all covered the same content, varying only in presentation, illustration and example. External examinations were predictable and many Educators taught to them, as opposed to educating on a broader scale.

The NCS, however, now requires skills, attitudes and values, to be taught in conjunction with the knowledge component. The *emphasis*, however, is not on the content. The idea is, for example, to ensure the learner can apply a creativity technique to solve a problem – which one he or she uses is immaterial. In other cases the content is given: for example, the detail on Belbin's Theory (team role classification) - the examination question then requires the learner to apply this information in a given situation.

4.5.3 Assessment Methods

Methods of assessment affect not only WHAT an Educator teaches, but HOW. Lecturing facts become irrelevant – it is necessary to create simulations and opportunities for the learners to apply knowledge and techniques in practice.

Assessment is also spread across a broader field. In the past the marking of a business oral, for example, was primarily content based. With the new emphasis, however, an oral now includes such aspects as type of research (knowledge) and presentation (skills), as well as personal comment and recommendations (values and attitudes). Refer to AS12.2.3 on **Appendix B: 12**.

The portfolio also requires a broader scope of assessment, so the emphasis has moved to formative assessment which allows learners opportunities to choose tasks which play to their strengths.

In addition, many of the new assessment methods are based on the realities of the workplace and Educators are slowly beginning to understand the merits of doing tasks in various stages, with assessment at each stage allowing the learner to identify problems and correct them before moving on. This results in deeper and richer tasks than would be possible with a whole host of independent and unrelated short tasks.

4.5.4 Assessment Tools

The traditional memorandum is fast losing popularity as more and more Educators understand the shift away from content assessment. According to the IEB Assessors Course (2004:126) an assessment tool is anything used to record information during a task such as rubrics, assessment grids and checklists. Within these categories, there are also many versions, each with its own unique advantages, such as holistic rubrics, analytical rubrics etc.

It is also important to caution against a random approach to assessment. The Department of Education lays down Learning Programme Guidelines – LPGs (DoE 2005a:1-32) so that assessment is complete, varied in approach and covering all the requirements of SBA and the portfolio. Educators need to use this guideline and adapt it to their own particular school environment in order to provide the best possible offering to their learners.

4.5.5 Assessment Resources

One of the original reasons for going the OBE route was touted as bridging the gap between the rich and the poor. The opportunities created for learners who are better prepared for both the working world and tertiary education; the emphasis on skills, attitudes and values, as well as the greater emphasis on practical application is meant to give previously disadvantaged learners the opportunity to compete on a more level playing field with their advantaged counterparts.

The basic economic principle of unlimited needs and limited resources is, however, always true in education. The requirements for implementation of OBE, from a basic level of re-training of Educators to the resources needed for practical work has led to many of the schools that were meant to benefit most, not being able to implement the very system meant to give them better education opportunities. There are far too many schools that do not have old magazines for collages, much less the scissors and glue to complete such a task. Science equipment, computers, the resources required for Design and Technology are all aspects which are not an option for many rural schools that do not even have running water or electricity.

Without suitable resources, it is not possible to incorporate broader assessment methods and give learners the opportunity for alternative assessment styles.

The aspect of transparency also causes problems in under-resourced schools. How does a rural Educator give learners copies of rubrics and detailed instructions for tasks if there is no electricity for photocopiers and overhead projectors?

4.5.6 Assessment Materials

One of the major issues in the new OBE has been the provision of LTSM (Learning and Teaching Support Materials (DoE 2005a:20) such as textbooks, posters, newspapers, magazines etc. With all subjects changing and the focus and approach being different from the past, it has been a real challenge to obtain textbooks which are relevant and of an acceptable standard. Yet the LPG (DoE 2005a:20) warns against not striving for exotic materials, but using 'common and readily available items to make the subject as real as possible'. It is also important to use multiple sources (Oberholzer 2007:2) – specifically because the new curriculum is not content based and it is important that learners interact with and learn to prioritise and make choices between various sources of information at their disposal.

The first problem that presented was the fact that resources now had to be rewritten – so old textbooks were no longer valid. As the OBE system rolled out into the FET phase, authors and publishers presented books to the markets based solely on their interpretation of the NCS for each subject. As these were not content-based, a comparison of the textbooks for a specific grade revealed a broad scope of information with little or no overlap. This was viable in grade ten and 11 due to the internal examinations, but posed a potential threat for grade 12 – how do you set a common examination when everyone is using different books?

The IEB has a policy of NOT prescribing specific books (Oberholzer 2007:1) and encouraging Educators to use a number of sources. There has now been a move to bringing textbooks in line with the SAG documents, but it still leaves disadvantaged schools with a dire shortage of resources, due to the increased costs of these replacements.

4.5.7 Other Assessment Issues

4.5.7.1 Cross-curricular Links

One of the tenets of OBE is the paradigm-shift away from a content-based syllabus. The resultant emphasis on skills, values and attitudes presumes that these will be cross-curricular and transferable. In order to apply this meaningfully, it is important for Educators within the same grade to work together in order to avoid duplication or a clash of approach. For example, the Business Studies Educator may have taught the class the use of the Delphi Technique (an advanced brainstorming technique where participants do not have to physically be together), whereas the English Educator is using the original brainstorming but the groups are battling to find a suitable time to meet due to over-commitment to sport and other extra-murals. By transferring the skill, they could apply the Delphi Technique and solve the problem in English.

However, unless the Educators know what is happening in other classes, they cannot tap into this resource. The time and effort required, however, for yet another meeting on a regular basis, as well as the time needed to check for commonalities in subjects is a problem. In the majority of cases, it is reliant on the learners to recognise similarities or a chance remark by one Educator to another in the staffroom may open a conversation.

4.5.7.2 Scaffolding

Scaffolding is also an important concept, but very time consuming to implement. In this process, common skills such as doing research or presenting an oral are brainstormed across the school from grade one to twelve, setting a progression of expected competencies for each grade. For example, in grade one an oral may involve only an informal 'show and tell', but by grade four they are expected to have speech cards and talk for one minute about something they are familiar with. By grade nine, they should be researching a topic, talking for two minutes and presenting it in a variety of formats such as formal, role play, news conference etc. By grade twelve they should be incorporating visuals and be able to meaningfully answer questions from the audience on their researched topic.

Another business-related example is the progression of entrepreneurial skills from the easier product-based businesses such as selling basic home-made edibles, through the process of buying in stock and selling in various markets – such as internal (school-based) and moving on to external (sports day with other schools) – and eventually graduating to service-type businesses (for example washing cars for a day) and ultimately running an on-going business for a period of time.

A well-developed scaffolding policy such as this will have a steady progression for each grade, making it easy for each Educator to know what to expect and to set meaningful tasks, irrespective of the subject. This means that a NSC candidate will be able to do the same level of oral presentation in Life Sciences as in English or Business Studies, but also that this learner is not still selling home-made cookies instead of building higher entrepreneurial skills.

4.5.7.3 Plagiarism

In the past plagiarising involved laborious copying out of text and the effort was often not worth the trouble, but the internet, ‘copy and paste’ functionality and the explosion of accessibility of information have brought immense new challenges to tracking and proving plagiarism.

Being the first year of Business Economics Portfolios, the 2004 moderation centered largely on compliance which was very low. Long reports and detailed feedback had to be written and plagiarism was rife in the research projects. During the 2005 moderation handing over, it was noted that the compliance had improved to some extent, but the amount of time it required to check and prove plagiarism was making it difficult to complete the other moderation processes. A joint appeal was made by the two moderators (Meyer and **the researcher**) to the IEB for plagiarism checkers and internet access at the venue and this was done the next year – 2006. Predictably some subjects were less alert than others, but Business Studies, Art and English were amongst the first to send plagiarised projects to the Irregularities Committee.

The problem of plagiarism lies largely with the lack of knowledge on the issue amongst Educators. Many of the projects that were blatantly plagiarised (10 – 12 pages downloaded straight from the internet) - with no referencing - were given high marks by the school. **The researcher**, together with Ms Delia Kench (Senior Examiner for Computer Studies) set about developing training courses which were run at national conferences, user groups, individual schools and ultimately at the 2007 marking session for all the portfolio moderators and examiners.

Another Educator, Ms Sally James simultaneously started running courses, but changing Educator mind-sets remains an ongoing and urgent problem. Some schools and Educators are starting to take the issue seriously, developing anti-plagiarism policies and in-school training courses for Educators, parents and learners, but these are still in the minority and every year there are portfolios that are discounted due to plagiarism. **The researcher** has also written (originally for Dainfern College) a school anti-plagiarism policy and non-plagiarism statement to be signed by learners, which is now being adapted and extensively used by various schools within the IEB.

The IEB has required non-plagiarism declarations to be signed by learners with research projects, as well as a general non-plagiarism declaration to cover the portfolio as a whole. Refer to **Appendix B:26&27**. This states that the work is authentic and not copied. In addition, the Educators sign a statement verifying that they have made some attempt to check for plagiarism. It does not mean that all the plagiarism is discovered, but it is a start in the right direction (and eliminating the most obvious forms), holding Educators accountable for instituting some checking systems. Many schools are currently considering the Turnitin Anti-Plagiarism Program which allows digital checking of learners' submissions (Turnitin [online] 2008) against continually updated online databases. This program is currently in use at most of the South African universities and at numerous overseas education institutions.

4.6 Conclusion

The literature study conducted in the previous chapters has highlighted the complexity of the problems affecting assessments and the multi-dimensional nature of changing an entire education system. This is compounded by the current political and economic volatility in the country and is putting enormous pressure on Educators who are, in the process, also trying to educate themselves and update their own qualifications in order to be relevant in the new system.

Against this background it has been a race against time for the IEB assessment specialists, examination panels and specifically, the portfolio moderators to put in place systems and strategies to assess and quality assure the SBA. It has also been a steep learning curve, as no-one came with experience of the new system and with both the media and parents becoming hysterical about the process, it has been a true challenge. For subjects like Business Studies which has been drastically re-invented, it presented even more challenges.

In chapter five, the specific case study of Business Studies in the IEB will be discussed.

**Chapter 5 - Empirical Research:
Case Study - Business Studies
Portfolio Moderation in the IEB**

5.1 Introduction

In chapter four, School Based Assessment (SBA) was discussed and the opportunities it allows Educators to structure the spread of assessments during the year in such a way as to allow individual learners the opportunities to excel at their individual strengths and within their own time-frames was addressed. This concept is basic to Spady’s vision of OBE (Spady 1993:5), and in line with the modern thinking on MI (Multiple Intelligences). In chapter three the **researcher** explored the way in which OBE has been adapted for the South African system, and the inter-relationship of the IEB and the DoE.

However, applying the theory at grassroots level presents many challenges. This chapter seeks to document the case study of the process which the IEB has instituted to moderate, manage and quality assure the portfolio process of the schools under its jurisdiction. This constitutes a total of 149 schools, with 7362 candidates who wrote the 2007 grade 12 examination (IEB 2008d:5). It will specifically look at the process from the perspective of Business Studies, but it is similar to that followed by all subjects. **Figure 5.1** shows a brief summary of the process in visual format:

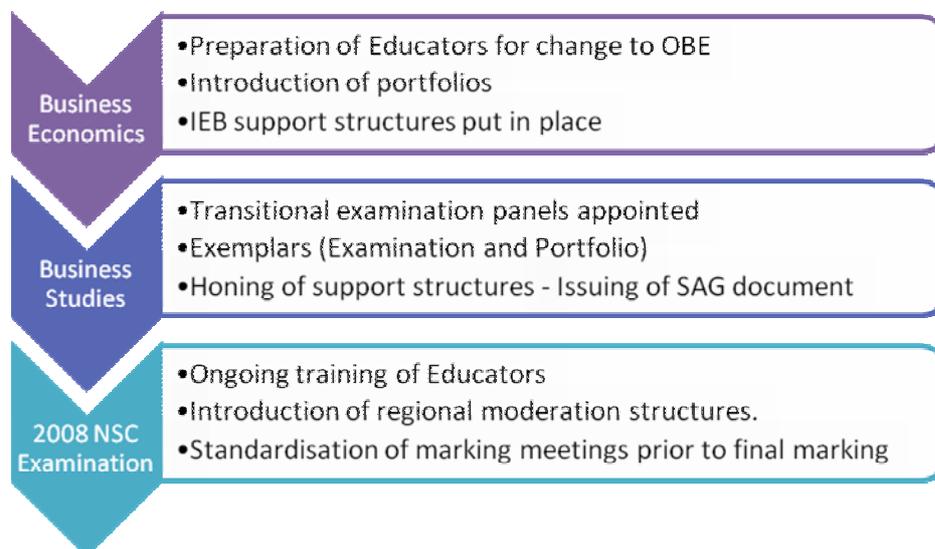


Figure 5.1 *The Three main phases of transition towards the implementation of OBE and the first NSC examination in 2008.*

For the benefit of simplicity, **Figure 5.1** does NOT include the time factor as there was an overlap of phases during the transitional process. This will be shown in **Table 5.1** with the appropriate explanations.

The researcher's role in this has been as a member of the **transitional examination panel** (2006 - 2008) which was tasked by the IEB to develop the Subject Assessment Guidelines (SAG) for Business Studies, as well as train and prepare Educators for the change to OBE. Although this has been a joint role with regard to the examination process, it has entailed taking the primary responsibility for the development of the portfolio component as **portfolio moderator**.

5.2 Time-line: Preparation for First NSC Examination - 2008

In preparation for the first group of grade 12s who would write the NSC in 2008, the IEB introduced portfolios as an official 25% of the final grade 12 marks under the old system in 2005. The 2004 marking session was a 'dry run' portfolio moderation exercise (schools were asked to submit portfolios, but they did not count towards the promotion mark) in the larger subjects, including Business Economics. For this purpose, portfolio moderators were appointed during 2003; training and basic guidelines provided to Educators and a statistical sample of portfolios were required to be sent by schools for moderation during the final examination marking session. These were then moderated – largely for compliance – and feedback given to Educators in preparation for 2005 when the portfolios would start counting towards the exit-level promotion mark.

Table 5.1 provides as a summary of the changes that occurred during the transitional period of introducing the OBE education system (discussion follows immediately after table in more detail):

Table 5.1 Time-line for Introduction of Portfolio Moderation at Grade 12 Level

KEY	Old system: Business Economics	New system: Business Studies	Examination panel cycle
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<u>2003</u>	<u>2004</u>	<u>2005</u>	<u>2006</u>	<u>2007</u>	<u>2008</u>	<u>2009</u>
Portfolio moderators appointed	Portfolio 'Practice run'	Portfolio counts 25% of final mark	Portfolio counts 25% of final mark	Portfolio counts 25% of final mark	Portfolio counts 25% of final mark	Portfolio counts 25% of final mark
			Introduction of grade 10 portfolios	Introduction of grade 11 portfolios	First grade 12 NCS examination	

5.2.1 Early Business Economics Portfolio Moderation

The first portfolio moderator appointed by the IEB for Business Studies was Ms Estie Meyer (Nel 2008). She was tasked with introducing the concept of portfolios to the Business Economics Educators and provide basic guidelines based on the syllabus for what was at that stage still Business Economics. This first portfolio included one major project and a selection of tests, class work exercises and examinations.

During the 2004 marking session, Meyer and a moderation committee of Educators moderated the portfolios. Problems centred largely around lack of compliance and detailed feedback was given to Educators in preparation for the 2005 portfolios.

The IEB appoints examiners and moderators on a three year cycle and during 2005, Meyer was appointed as Business Economics standard grade (SG) examiner for the 2006 – 2008 cycle and the researcher was appointed as **portfolio moderator** for the same period. The 2005 marking session provided an opportunity for handing over and training for the new job as portfolio moderator.

During 2005 – 2007, the examination panel (consisting of said SG examiner, **portfolio moderator** and the higher grade examiner – Mr. Sean Topper) made a decision to keep the grade 12 portfolio requirements the same until the change to OBE in 2008 to provide some stability in a very volatile educational environment. At that stage, with SG and HG candidates still writing separate examinations, the portfolios were also structured to reflect these differences.

5.2.2 Business Studies Portfolios

In 2006, however, the grade 10s (who were the potential 2008 grade 12s) had to be exposed to the OBE system. The new portfolio requirements for Business Studies which were set by the **portfolio moderator** (researcher) in consultation with the examination panel, and ratified by the IEB had to be introduced. FET is a three year qualification and prescribed portfolios for each year are required to be kept for the entire phase. Learners who change subjects are required to catch up the portfolio components for the time missed. If they change schools, the portfolios are required to be transferred with the learners (DoE 2005b: 19).

Business Economics had been very theoretical with emphasis on content which mainly covered office management theory and the eight management functions. The new Business Studies NCS introduced diverse skills as teamwork, problem-solving and social responsibility, therefore the emphasis in the portfolio could switch from being content-driven to the application of skills and values.

5.3 IEB Supporting Structures

Managing the diversity of schools in a wide-spread geographical distribution is a challenge which cannot be met without sound logistical structures. **Figure 5.2** shows how the IEB manages this process through the following structures within each subject (i.e. a school may fall into different user groups for different subjects):

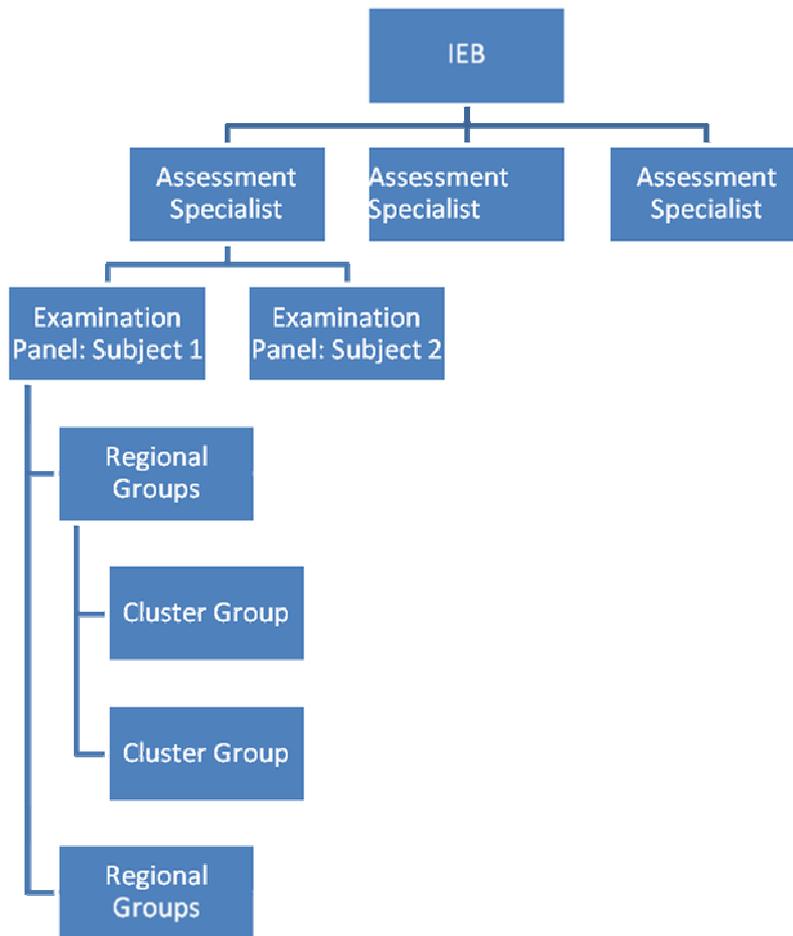


Figure 5.2 Format showing the supporting structures of the IEB.

5.3.1 Assessment Specialists

These are full time IEB employees who are each tasked with overseeing six to seven subjects for which they co-ordinate all planning, organisation and assessment issues surrounding their subjects. The assessment specialist for Business Studies is Ms Estelle Nel, who is also Training Manager.

5.3.2 Examination Panels

The examination panel consists of the examiners (one for each paper written), the internal moderator and the portfolio moderator. In languages, there are additional oral moderators. This panel constitutes the subject experts who advise the assessment specialist and run the subject (Oberholzer 2008b).

The 2008 examination panel for Business Studies consists of:

- i. Paper I Examiner: Mr. Jose Oliviera
- ii. Paper II Examiner: Ms Estie Meyer
- iii. Internal Moderator: Mr. Sean Topper
- iv. **Portfolio moderator:** Researcher
- v. In 2008, an analytical moderator was also appointed for all the major subjects, and for Business Studies this coincides with the internal moderator: Mr. Sean Topper

Note: See letters of permission on **Appendix D:1-4**

5.3.3 Cluster Groups

Cluster groups originally started in the early 1990s and are an attempt at public accountability and bridging the gap between Educators and examiners (King & Van Den Berg 1993:203). They consist of groups of six - ten schools (depending on geographic location) in a local area that work together for the purpose of support and moderation. Cluster groups typically meet three or four times a year and often set common examinations, projects and tasks.

Cluster group leaders are elected annually and registered with the IEB which channels communication through them to schools via the CRM (Cluster Report Manager [online] 2008) programme which is hyperlinked on the homepage of the IEB website: www.ieb.co.za.

5.3.4 Regional Groups

Regional groups are a combination of cluster groups that meet periodically to debate bigger issues or provide training and support to Educators. The Regional Representatives are elected annually at the National Conference. The IEB holds annual workshops in these regional groups which are run by the assessment specialists and **examination panels** (including researcher for Business Studies) using guest speakers where necessary. The 2007 theme was “Building Quality Through Moderation” (IEB 1008d:6) and in 2008, the theme was “Assessing in a Non-differentiated System” (Nel 2008).

5.3.5 National Subject Forums (NSF)

Together with the **examination panel** (including researcher for Business Studies), all regional representatives are automatically members of the NSF which meets annually (or more often if necessary) in order to review the SAGs, debate issues of importance and discuss aspects that are relevant to the subject.

5.3.6 Annual National Conferences

In February each year, a national conference is run for each subject (IEB 2008d:6). As the majority of the IEB schools are in KwaZulu Natal and Gauteng, half the subject conferences are held in each of these locations, and they alternate annually i.e. one year Business Studies will be in Johannesburg, the next year in Durban. These conferences are organised by the IEB assessment specialist, but run by the **examination panels** (including researcher for Business Studies) which use the opportunity to reflect on past examinations, provide guidelines for future examinations and do training of Educators – especially with the introduction of the new OBE system. It is also a valuable opportunity to network, debate issues and run workshops around problem areas in the curriculum.

5.4 IEB Processes for Introduction of OBE

5.4.1 Core Skills Testing

As explained in chapter three (section 3.4.3), the IEB has been running Core Skills Tests at grade nine level for a number of years (IEB 2008d:7) across a broad spectrum (including government schools) in order to build up a database of the abilities and expected performances of each year group. In 2008, there is an absence of comparative data for the grade 12 final examinations from previous years – due to the significant changes in the system. Consequently, this Core Skills data can be used both for the 2008 candidates to predict their expected performances and to compare their Core Skills data with that of candidates from previous year groups.

5.4.2 International Benchmarking Tests in English, Mathematics and Science

2007 saw the introduction of benchmarking tests in South Africa for grades six and nine. These are in collaboration with the Australian Council of Educational Research with whom the IEB has built up a very positive working relationship over the past few years (IEB 2008d:7). In 2008, this was extended to include grades three to eight as well as grade ten. This is part of the IEB's commitment to quality assurance (see section 5.5) as both English and Mathematics form an integral part of learning and understanding in all other subjects.

5.4.3 Exemplars

In 2005, prior to the introduction of OBE in the FET phase, the IEB requested the **portfolio moderators** (researcher for Business Studies) of all subjects to put together grade ten portfolio exemplars (IEB 1008d:6). These exemplars represented sample projects which would account for 20% of the portfolio mark. These were issued to Educators at the National Conferences in February 2006 and provided the basic guidelines for modelling portfolio tasks.

The examination panels were also asked to set exemplar examination papers to give guidance regarding the new methods of testing - the movement away from content and to skills, attitudes and values. In addition, 22 project schools were statistically selected (with a spread across types, sizes and geographical location) from the 149 IEB schools. Their grade tens wrote common examinations (set by temporary examination committees) in 12 key subjects. This was done in order to generate data which could be generalised across the entire population of IEB schools (IEB 1008d:6). Business Studies was again one of the 12 chosen subjects.

In 2007, grade 11 portfolio exemplars were issued and in addition, the IEB examination panels set national grade 11 mock examinations for each subject known as 'The Standardisation Project' (IEB 1008d:6). These were written to a common timetable by most of the IEB schools (although it was marked at school level) and data was then submitted to the IEB.

In 2008, the watershed year for the FET phase, grade 12 portfolio exemplars were issued at the National Conferences and preliminary examination exemplars - which mimic the formats and requirements of the final examination - were issued.

The **three Business Studies portfolio exemplars** were set by **the researcher**, and edited by both the examination panel and IEB assessment specialist. They are designed to cover a broad range of skills. Nel (2004) is adamant that opportunities such as these should be used to expose Educators to new ideas – she refers to it as “assessing forwards”. Within Business Studies as a subject, the exemplar projects are there to give an indication of quality and requirements, but are not compulsory – schools are free to set their own or adapt the projects to some degree. However, with the pressure of adapting to so many changes, many schools do use them exactly as they are issued by the IEB. As explained in chapter four, the portfolio requirements are currently (2008) two research projects: one primary research and one secondary research.

All ASs referred to in the following section are available on **Appendix B: 10-20**).

- **The 2006 Grade 10 Exemplar** was a primary research project using Entrepreneurship as a theme with an analytical rubric - a hierarchy of standards based on clearly defined and detailed but separate criteria items (DoE 2003a:38). Known as the “R10 project”, the Educator was required to give each learner R10 seed capital and learners then had to:
 - Research ways in which to build more capital in order to start a business
 - Research potential businesses and target markets
 - Start and run a business, using the researched information
 - Report on the success of the business, through financial statements and a written report

The project emphasised field research (for example doing market research or a needs-analysis – See AS10.2.1 on **Appendix A:2**) and the building of higher order level skills in Entrepreneurship. That is, running service-type or on-going businesses as opposed to the traditional approach of market days and product-based businesses which are popular in the lower grades. Ultimately they had to run the business and present the financial statements with the R10 being paid back to the school (plus ‘tax’ which was donated to charity).

- **The 2007 Grade 11 Exemplar** was a secondary research project based on Marketing, (which covers a significant part of the curriculum – see AS11.4.1 and AS11.4.2 on **Appendix A:4**), but this had a holistic rubric – a hierarchy of criteria assessed according to a global picture of the standard required (DoE 2003a:38). This content was familiar to Educators as Marketing was a major section in the old matriculation syllabus so they were comfortable with the type of project, whereas the holistic rubric introduced an entirely new concept in assessment.

- **The 2008 Grade 12 Exemplar** presented a challenge as it would be the first to form part of the new NSC accreditation. There was a lot of pressure to set a secondary research project with a familiar theme (such as AS12.2.4 on **Appendix B:13 – Investment and Insurance** which had also been a major section in the old syllabus), but it was decided to use an entirely new concept which was “**AS12.3.8: Meaningfully contribute time and effort to advancing the well-being of others within a business context**”. This, together with AS12.1.2 (see **Appendix B:17&10** respectively) which examines social responsibility issues - as pertaining both to individuals and businesses - was a completely new direction for the subject which was met with a lot of apprehension. The primary research exemplar project required learners to research needs in an under-privileged community and provide some form of tangible assistance. Built into the project was also the requirement that it had to be a *sustainable intervention* and learners had to grapple with how to apply this in reality.

Many schools did take the challenge and examples of projects that were eventually done included: setting up recycling programmes (with payment going to the community); writing booklets on entrepreneurship; launching a web-site for a personnel agency working in Diepsloot; making posters and collecting other resources for Business Studies classes; assisting entrepreneurs with setting up business plans and entrepreneurship training. It has proved to be a life-changing experience for Educators and learners alike as well as acting as a catalyst for on-going programmes. Some of these projects are being handed over to the next year-group which means they are able to go into more depth and achieve greater sustainability.

5.4.4 Educator Training

The largest single hurdle to overcome in the process of changing to the OBE system was that of retraining Educators. The IEB Training Department - ASSET (also under the leadership of Nel) has for several years been doing the following courses (IEB 2008d: 5) for schools:

- Basic Introduction to OBE

- Assessor Course for Teachers (this is a pre-requisite for the next two courses)
- Design and Development of Assessments
- Course for Moderators in Education

The Assessor Course currently (2008) costs around R2800 per person (Nel 2008), with the Design and Development and Moderator's courses being charged on a similar level. The basic introductory course was therefore a cheaper option (at R300 – 2008) for those schools who could not afford to have large numbers of their staff trained as assessors, especially at the GET and lower levels. However, by 2010 only Educators that have an assessor qualification will be allowed to mark the grade 12 IEB examination papers. All examiners and moderators - as well as the Heads of Academics at schools - have been encouraged to go further and get at least a Moderator's Certificate. Buy-in from the schools was slow before 2006, but with the pressure of 2008 grade 12s building up, there has been a significant increase in schools sending their Educators on these courses.

It is not essential for IEB schools to do their training through the IEB Training Department (ASSET), which is registered with the ETDP SETA (Education, Training and Development Practices Sector Education and Training Authority) but ASSET is highly regarded amongst corporate, government, NGOs (Non-Governmental Organisations) and higher education clients (IEB 2008d:5). There are also many private and government sponsored SAQA registered courses available at the moment.

Informally, the task of subject-specific training fell to the assessment specialists and **examination panels** (researcher for Business Studies) for each subject. Although it was a lot easier to train Educators who had done an assessor course (and made the paradigm-shift to the new methods of assessing), the reality was that many still have not done the course, or do not understand the true changes.

Both Nel and the members of the examination panel ran numerous workshops (E.g. Rubric Workshop – 2006 Conference at Saheti School; Recognising and Dealing with Plagiarism Workshop – 2007 Conference at Durban Girls School; Applying OBE on a Practical Level – 2008 Conference at Birchacres Conference Centre), training sessions and information sessions at the national conferences, regional meetings and individual cluster groups and this remains an on-going process.

5.4.5 Subject Assessment Guidelines (SAG)

5.4.5.1 Development of Original SAG

The move to OBE necessitated a move away from the content-driven syllabus to the SKAV-driven (**S**kills, **K**nowledge, **A**ttitudes and **V**alues) curriculum which was presented in the form of the NCS (National Curriculum Statement) for each subject. Throughout the introduction of the OBE system from the Foundational phase upwards, there has been concern around exactly what content to cover. However, as the entire process up to GET level was internally assessed, it never became a crisis.

Alarm bells started ringing during the first year on the FET level (grade 10 in 2006) when each textbook publisher had interpreted the Learning Outcomes (LOs) and Assessment Standards (ASs) differently. Both private and public schools started putting a lot of pressure on their respective assessment bodies to provide some type of common guideline to work towards for the grade 12 exit examination. Decisions were made by both the IEB and the DoE to provide more detail on the SAG (Subject Assessment Guidelines) which had already been issued with some fundamental information. The **examination panels** (including researcher for Business Studies) were tasked with writing these SAGs (**Appendix B**) – which consisted of the following sections:

- General guidelines, type and length of examinations and basic portfolio requirements. (**Appendix B: 2-9**)

- A section addressing each Learning Outcome (of which Business Studies has four) and Assessment Standard in detail, giving some content guidelines. (**Appendix B: 10-20**)
- Detailed portfolio guidelines, including moderation procedures and formats and guidelines for running cluster groups. (**Appendix B: 21-47**)

For Business Studies, the **examination panel** (including researcher) co-wrote and cross-moderated the document, but many of the new sections had to be researched from scratch and there was no time to test it in the classroom.

The request to write it was given in November 2006, and it had to be ready for the February 2007 conferences (IEB 1008d:6). The preliminary document was submitted to Umalusi at the end of January 2007, and three days before the conference, they responded with changes that had to be put through before it was issued to Educators. This (together with all the other information) was issued on CD as there was no time to print and collate, and the costs would have been immense for the amount of information that needed to be distributed.

Of necessity it had to be an open document. After discussion at conference, the NSF and any other interested Educators had the opportunity to comment, but by the deadline (14 days later) only two minor comments had been made on the Business Studies SAG. It was then edited and finalised by the IEB and approved by Umalusi with the understanding that it (as with all the other subjects' SAG's) would be reviewed annually as Educators started becoming more experienced with the new content in the classroom. The NCS itself would only be up for review in 2010.

Section D of SAG – the Portfolio Requirements, however, needed much more supporting material and between February and September - when the first review was done - these had to be developed by the **portfolio moderator** (researcher). This included checklists for the moderation of both learner and Educator portfolios at the various levels, reporting forms, procedures for all the processes (such as cluster group moderation), mark lists and cover pages in order to ensure uniformity for the portfolios, which would made moderation easier.

This Business Studies SAG (**Appendix B**) has subsequently formed the basis for several other subjects who have adapted parts of it for their own use.

The SAG **Appendix B** has been colour-coded to reflect the following:

- The original NCS with LOs and ASs are shown in purple.
- Documents which are standard throughout subjects in the IEB have been shown in black.
- Sections co-developed by the **examination panel** (including researcher) are shown in green.
- Sections pertaining to the portfolio which were developed by **the researcher** are shown in blue.

5.4.5.1 Review of SAG Document

The Business Studies SAG document used in **Appendix B** is the current (2008) edition, but has been reviewed by the **examination panel** (including researcher) and - pending Umalusi approval - will be replaced with the new document. There are no dramatic changes: at this stage of the process it is important to allow Educators to become familiar with the requirements so the review has concentrated on:

- ensuring better understanding - in some instances changing wording and giving improved explanations to eliminate misinterpretation
- expanding concepts – giving more details on particularly difficult sections of the curriculum
- adding the **regional moderation documents and instructions** which were not part of the process during the original compilation of the SAGs

The purpose of providing the SAG document (especially in relation to the portfolio requirements) is to ensure better standards and more conformity in the SBA as it counts 25% of the final promotion mark.

In the following section (5.5) the importance of quality assurance (QA) will be discussed, followed by the issue of moderation (section 5.6) which is the tangible evidence of quality assurance.

5.5 Quality Assurance (QA)

In order to accept SBA from different schools with different Educators and a variety of levels in resources it is important both to have - and to adhere to – preset standards as much as possible. The setting of these standards is a challenge, as much of the assessment is either informal or subjective. It is therefore imperative that criteria are set in detail, and that the moderation process is a well constructed double-checking system to ensure that a different person, using the same criteria, would get to the same conclusion.

The IEB Moderators course (2006: 71) defines the following:

“Quality assurance is ensuring that agreed standards are met and that steps are taken to improve quality where problems are identified.”

It is the responsibility of all role-players in the educational system to do Quality Assurance: Educators within their classes, schools, examination bodies (DoE and IEB), and ultimately SAQA and Umalusi.

Quality assurance in assessment is vital to ensure the reliability and validity of tasks and assessment tools. In order to achieve this, some of the critical elements that need to be addressed are the registration of assessors and the establishment of moderation systems as well as provision for self-evaluation as an essential part of the review process (SAQA 2000: 4).

As mentioned previously, Umalusi does quality assurance through a regular process of audits – visiting schools unannounced during the grade 12 examination processes and ensuring that all the rules and regulations are adhered to. In addition, they do annual audits of specific sections, such as the tracking of the 2004 Business Economics (SG) paper (Umalusi 2005: 7), and the 2007 National Business Economics Portfolio Moderation (Nel 2008).

They have also required the IEB to do additional training for examiners and moderators (Oberholzer 2008b). During 2008 they will be auditing the National Accounting Portfolio Moderation process.

Moderation is discussed in more detail in the following section (5.6) as that provides the ground-level evidence that standards are being adhered to, and identifies weaknesses in the system which can be improved upon in the future.

5.6 Moderation

In the old educational system a head of department would occasionally check a test or examination, and in government schools an inspector would periodically come and check that records were being kept, work was up to date or sit in on a class to observe the teaching process.

The IEB Moderators course (2006:70), however, defines moderation as the:

“...process of ensuring that practitioners are working to agreed standards, and that there is consistency from year to year, within fields, and nationally.”

In applying the definition, moderation should therefore be an integral part of the assessment process, and needs to be firmly based in the school's moderation policy, as well as being based and executed according to a specific moderation plan (IEB 2006:89).

5.6.1 Moderation Requirements

In OBE, the moderation requirements are far more stringent than in the old dispensation and it is as much about future development of the educational process as a whole, as about moderating specific pieces in isolation. Moderation happens on two different levels:

- **Compliance** is moderated on a simple tick-list: Have requirements A, B and C been met? This includes issues such as correct formats of examinations, the inclusion of marking criteria, time/mark ratios etc.

- **Standards** are more difficult to moderate. Here the moderator is looking at the depth and breadth of the task; whether it is appropriate for the topic and whether it is suitable for the grade of learners it is intended for.

In addition, it needs to be sufficiently spread across the levels of thinking skills in the required 60/40 (60% LOT – Lower Order Thinking and 40% HOT – Higher Order Thinking) split. This type of moderation requires more detailed rubrics or checklists, with sufficient space for feedback and suggestions.

These moderation requirements are putting huge pressure on Educators, both from a 'requirement to perform' perspective, and time constraints. By its very nature it requires an immense amount of administration – with numerous forms to be filled in, signed and filed as proof of the process.

School-based moderation is especially difficult for those Educators who work as one-man departments – for example in a school with only one Art Educator. He or she now has to find someone from a different school to moderate and, whereas pre-moderation can normally be done via email, the rest of the process is hands-on.

One of the most controversial aspects of moderation is the theory that it can be done on a cross-subject basis. This is based on the fact that in OBE, the process and the application is more important than the content, and an Educator from a different subject can often be more objective as well as adding value in cross-pollinating suggestions from their subject. However - on the ground-level - this is very difficult to implement and schools are grappling with the best way to do moderation without it imposing impossible demands on the already overloaded teaching staff.

5.6.2 Assessment Principles

The aim of moderation is to ensure that the assessment principles have been applied in the setting, administering, recording and reporting of assessments. The following is a brief summary of these principles.

Although there are 11 Assessment Principles, the IEB emphasizes the first six – which are shown in italics throughout this section: **Validity, Authenticity, Currency, Sufficiency, Fairness, Consistency**. Once these six are part of everyday assessment practice, the next five: **Appropriateness, Manageability, Integration, Systematic, Openness** will be added. This is to avoid trying to cover all 11, and only succeeding on a superficial level (Nel 2004). More detail is available on **Appendix B:33-35** where the 'IEB six' are included in the Business Studies SAG as a 'quick reference' for Educators when assessing. Dreyer (2008:14) groups all the assessment principles into the following categories:

5.6.2.1 Evidence of Assessment

1. Validity (Part of IEB Six)

*Validity is the extent to which an assessment measures that which it claims to measure (IEB 2006: 73/**Appendix B:33**). The validity of questions is easier to quantify objectively in the case of SRI's (Selected Response Items), as they lend themselves to more accurate statistical analysis (University of Cape Town 2008:3). CRI – Constructed Response Items, on the other hand, need more detailed input from the learner which immediately adds a subjective element to the marking of it.*

2. Authenticity (Part of IEB Six)

*Authenticity is simply the question as to whether the product or process is the learners' own work (**Appendix B:33**), and is primarily linked to the referencing and citing in a research document (with the learners signing non-plagiarism statements). It also includes the checking for - and prevention of - copying between learners in class assessments. A correct anti-plagiarism statement includes the sentence "I have not copied, or allowed anyone else to copy from my work." (See example on **Appendix B:27**)*

3. Currency (Part of IEB Six)

*Currency requires the evidence to show that the learners' skills are up to date and valid (**Appendix B:34**). For example, can learners still perform a set task at the required level? It also raises the issue of modern techniques:*

for example can learners present information in a computerised format, or do Computer Accounting? This is a controversial issue with the lack of resources in disadvantaged schools.

4. **Sufficiency (Part of IEB Six)**

Sufficiency refers to the assessment tasks covering adequate ground in terms of the assessment standards, as well as the level, quality and rigour of the task (Appendix B:34). If tasks are too easy, then learning and skill development would not take place and assessment would be positively skewed, not being representative of the learners' true abilities.

5.6.2.2 Methods (or Activities) of Assessment

5. **Fairness (Part of IEB Six)**

Especially with the diversity of cultures and languages (as discussed in chapter three) in South Africa, it is essential to avoid barriers to learning for any particular group of learners (Appendix B:35). Any bias in the form of language, culture, ability or resources (for example physical, time, assistance) has the potential to exclude certain groups of learners from having an adequate opportunity to do their best.

6. **Appropriateness**

Appropriateness determines whether an assessment is suitable to the task it is assessing, and whether it can in fact provide the evidence to substantiate the assessment (Dreyer 2008:14).

7. **Manageable**

Assessment should be part of the learning process and not so onerous and complicated that it hampers the learning (Dreyer 2008:15).

8. **Integrated into work or learning**

Dreyer (2008:14) refers to this as "naturally occurring evidence" and it entails assessment which is part of the process and not a separate entity.

5.6.2.3 Overall Assessment Process

9. Consistency/Reliability (Part of IEB Six)

Assessors are human and are therefore subjective. The principle of consistency aims to build checks and balances into the assessment process which will ensure (**Appendix B: 34**):

- The same assessor, at a different time, would make the same judgment.
- A different assessor, using the same assessment tool, would make a similar judgment.

This is achieved through setting clear and objective criteria, pre-moderation of the task, and standardisation processes for assessors.

10. Systematic

The process should be well organised, effective and manageable. (Dreyer 2008: 15)

11. Open

Openness (or transparency) refers to learners having access to the criteria that they are going to be marked on so that they can plan their tasks and understand the process from the outset (Dreyer 2008:15). This is also a controversial aspect in under-resourced schools that do not have the facilities to copy rubrics and other assessment grids for the learners to use.

5.6.3 Moderation Structures

As discussed previously, there were no formal moderation structures for SBA prior to 2004. In order to address this, guidelines had to be set for the various levels of moderation that are required in order to quality assure the process. For Business Studies, this has been done by the researcher as **portfolio moderator**, in conjunction with the assessment specialist (Nel), with the rest of the examination panel acting in an advisory capacity. The appropriate forms and reporting structures for each of the following levels is included in the SAG on **Appendix B: 37-47**.

The different levels of moderation are:

5.6.3.1 Pre-moderation of Tasks (School or Cluster level)

Once a task is designed, it needs to be moderated both for compliance to the SAG requirements and for standards. This is done either by another Educator within the school, or (as is often the case in small departments) if there is only one Educator for a particular subject, it is moderated by an Educator in the cluster group.

5.6.3.2 School Moderation of Process

When the task has been set to a satisfactory standard - with an appropriate assessment tool - the administration of the process needs to be moderated. Whether it is a test, examination, group work or presentation being done, it is important to ensure that the learners understand the instructions; have access to the necessary resources; and that the task is administered under the appropriate conditions. Part of this process may also involve observing the initial recording of assessment marks or informal assessment comments - especially for formative assessments.

School moderation happens at three distinct times (IEB 2006:95) during the process of a task:

Pre-moderation

This entails the checking of the task, test or examination by an independent moderator before it is issued to the class.

Moderation during task

Task moderation occurs when the moderator selects specific tasks to attend and moderates the facilitation of the task by the assessor for example attending a class practical or paying a surprise visit in the middle of a test or examination to ensure proper procedures are being followed.

Post-moderation

This entails the moderation of both the marking process and the administrative procedure following it (for example recording of marks and incorporation into final reports) as well as any possible appeals or follow-ups that may be necessary (for example remarking due to discrepancies highlighted by the moderation process or handling of plagiarism issues).

Independent agencies such as IQAA (Independent Quality Assurance Agency) are used by some schools to assist them in the setting of standards and monitoring of the quality assurance processes (Steyn 2008). Because these results are quality assured, they carry more weight and are subsequently often used as part of the school's marketing programme.

5.6.3.3 School Moderation of Assessment

Summative assessments and part of the formative assessments (e.g. reports or feedback written post-task) will have to be marked afterwards and a sample of this marking is then moderated by another Educator.

5.6.3.4 Cluster Moderation of Portfolios

By the end of September, the IEB requires all schools to have completed their cluster moderation. The IEB randomly selects a sample of approximately 10% (with a minimum of five) names per subject from each school, (IEB 2008b:3) and it is the responsibility of the cluster leader to arrange a meeting where all the Educators will bring those selected portfolios for moderation. As previously discussed, this process is administered through the CRM – Cluster Report Manager, an on-line tool on the IEB website (Cluster [online] 2008).

5.6.3.5 Regional Moderation of Portfolios

Regional moderation was introduced in 2008 (IEB 2008b:1) and meant that travelling moderators (who had received suitable training) would visit schools and select portfolios on the spot.

This level of moderation was introduced to avoid problems such as:

- Educators only preparing the IEB selected portfolios for cluster and national moderation, not all the portfolios.
- Cluster moderation tends to be rushed and busy with other agenda items so there is no control regarding the standard of moderation.
- The reality of having five or more learner portfolios, (plus an Educators portfolio per school) sent to national moderation was becoming a logistical nightmare both from the transport and storage perspective and the size of the moderation committees that were needed.
- The feedback benefit of moderation is diluted when it is not on a personal level, such as national moderation feedback, which is in the form of a written report.

Regional moderation enabled moderators to visit schools in their local areas and spend time with Educators, giving personal feedback and training as they do the moderation. In some cases, however, where schools are geographically wide spread or difficult to get to, the moderators would select portfolios from the school list and these would be sent to them by courier the next day. In all cases, the regional moderators would file reports with recommendations at the end of the process and that would enable the IEB to call for fewer portfolios for national moderation at the end of the year. Over the next few years, the intention is that all schools will, however, be visited and a database established of schools that are complying with the SAG requirements which may mean smaller samples being tested from those schools for a particular subject.

The **researcher's** role in regional moderation has been involvement in the setting up of the system, conducting training at the Regional Moderators Workshop and acting in an advisory capacity for the regional moderators during the process.

This role was specifically key to the process during 2008 as it was the first year of regional moderation and the assessment specialist (Nel) was overseas presenting a paper at the IAEA's (International Association for Educational Assessment) 34th annual conference in Cambridge during the roll-out of the process.

5.6.3.6 National Moderation of Portfolios

At the end of October each year, the IEB sends out another statistically sampled list calling for 10% of learners portfolios (together with the Educator portfolio) from each school to be sent to their offices in Houghton for National Moderation. These are then taken to St. Stithians College in Randburg (which is the IEB central marking venue) during the examination marking session (IEB 2008a:26) in early December.

A classroom is allocated for each subject, (in close proximity to the examination marking venue for that subject) and the **portfolio moderator** (researcher) runs the marking session together with:

- A committee of sub-moderators (Educators teaching the subject);
- One or two university students who apply to be 'checkers' (assisting with the administration) or 'plagiarism checkers' (checking research tasks for plagiarism). For the latter, computers and internet connections are provided on site.

It is the **portfolio moderator** (researcher for Business Studies) for each subject's duty to train both the sub-moderators and the plagiarism checkers as the demands differ for each subject.

The portfolios that have been received from each school are moderated on the following basis:

- All Educators portfolios are moderated, using the appropriate form to check first for compliance, and then to check the suitability, standard and variety of tasks (quality).

- A sample of the learners' portfolios is checked for compliance, standard of work and standard of marking – again using the appropriate forms.
- Both the moderators and the plagiarism checkers will check for any signs of plagiarism.
- Any irregularities in compliance, standards or suspected plagiarism are reported to the **portfolio moderator** (researcher) who will evaluate the significance of the variation and if it is potentially significant it is referred to the assessment specialist. In some cases, the assessment specialist will authorise the adjustment of the marks, but major problems are flagged and sent to the Irregularities Committee where a thorough investigation is done. If necessary the marks are adjusted or the portfolio component of the mark is listed as being unusable (which means the examination will count 100% for that school's learners).

5.7 Summary of Researcher's Role in the Process

During the process of being **portfolio moderator**, three other opportunities have opened up to the researcher which are also relevant here:

- Appointment as **internal moderator** for EMS (Economic and Management Sciences) for the ABET (Adult Basic Education and Training) division of the IEB. This involves the moderation of several EMS papers a year, at both NQF levels three and four, as well as specialised papers for industries such as the Food and Beverage industry.
- Although the portfolio moderator is traditionally not involved in the setting of the final grade 12 examinations, the Business Studies examination panel felt that all three of them were very left-brained, linear-thinking individuals and in the interest of providing for the right-brained, visual and creative learners, the researcher was **co-opted onto the examination setting panel** in 2008.

- New textbooks are released annually at the national conferences, and with the simultaneous release of the SAG documents at the 2007 conference, there was a realisation by both Educators and the examination panel that most of the available resources did not do justice to the requirements of the SAG. As the IEB market is smaller than that of the DoE, most textbooks attempt to cover both SAGs, but there are significant differences between them. In a desperate attempt to provide good quality resources, the examination panel wrote a grade 12 textbook and learner’s book based on the IEB SAG requirements which were ready for distribution in September 2007, when most schools were starting their grade 12 curriculum for 2008.
- The books were well received within the IEB schools doing Business Studies, and during 2008 the **authors** edited the initial books as well as extended the range to include an additional workbook for grade 12; grade 11 books and EMS books for grade eight and nine. In this process, it was necessary to co-opt additional authors to assist. The grade 10 books, as well as posters and educational games for all grades are being prepared for the market in 2009.

The IEB is adamant that they do not endorse or prescribe specific textbooks, but acknowledges that many of their examiners and moderators are at the forefront of educational innovation and involved in producing resources, especially at this critical time of change. To this end Oberholzer sent out a letter supporting examiners who were contributing to the pool of knowledge through the provision of textbooks and other resources (Oberholzer 2007).

Table 5.2 serves to summarise the role that the researcher has played in the transitional process to OBE within Business Studies as a subject under the IEB.

Table 5.2: Summary of Researcher’s Roles in Business Studies

KEY	Roles within the IEB			Private Capacity
	Individual roles prior to being on Examination Panel	Examination Panel Roles	Portfolio Moderator Roles.	Co-Author of Textbooks and other Resources.

New Assessment Methods in Business Studies in the FET Phase

Researcher's Role:	Previous	2005	2006	2007	2008	2009 +
Business Studies Educator	1995 – 1999: The King's School West Rand 2001 – present: Dainfern College					
Cluster Leader	2002					
Gauteng Regional Coordinator	2003/2004					
Appointed as Portfolio Moderator		Training and hand over.				
Portfolio Moderator (3 year cycle)			Responsible for National Moderation of grade 12 portfolio's – 25% of final promotion requirements.			
Development of SAG document.				Original document	Review of document	
Development of Portfolio SAG documents.				Original document	Review of document	
Development of Exemplars			Entrepreneurship	Marketing	CSR	
Co-opted onto Examination Setting Committee					First NSC examination.	
Re-Appointed as Portfolio Moderator						2009-2011 cycle
Review of SAG documents.						2009-2011 cycle
Member of NSF – National Subject Forum	2003/2004	Annual meetings for Business Studies related issues.				
Educator Training and Speaker at Conferences.	Only generic Educator training at school, cluster and regional level.		OBE related training at all levels, including National Conferences.			
Co-Authoring of Textbooks and other Resources. (Note: Grade 10 textbook due in 2010)				Grade 12 textbooks for 2008.	Grade 11 and 12 textbooks for 2009. Grade eight and nine EMS textbooks for 2009.	

5.8 Conclusion

Chapter five has documented a very specific journey – that of the transition in the IEB from Business Economics in the old dispensation, to Business Studies in the new. It is not, however, a unique journey – every subject in both the IEB and DoE has walked the same road and the challenges have been enormous. Never before have Educators been asked to make such a dramatic and time-pressured shift to a completely new paradigm.

Yet through a slow (and often painful) process, the IEB has had the vision to look ahead and anticipate the necessary changes. Its proactive approach is evident in the number of conferences (quoted in this research) that they have hosted and participated in over the past few years. Each of these conferences has included overseas experts from whose experience with similar issues the IEB management has been willing to learn and take guidance. This foresight has enabled the IEB to emerge as a leader and win the respect of organisations such as the DoE, SAQA and Umalusi, which has lead - as previously discussed - to valuable partnerships being forged between these organisations who are all crucial players in the South African education environment.

No single aspect of this transition occurred in isolation. For each examiner and moderator, it has been an enormous learning curve – taking the lead in a climate of uncertainty, where it was necessary to learn by doing. Both the 2005 (for the 2006 -2008 cycle) and 2008 (for the 2009 -2011 cycle) appointments of examiners and moderators were characterised by a lack of applications and the assessment specialist had to approach Educators to make themselves available for appointment.

For those examiners who have accepted the challenge, it is often a difficult position to be in with an incredible amount of criticism from the very Educators who are not prepared to contribute to the process. The strength, however, lies in the teamwork, cross-moderation and emotional support that is inherent in the examination panels, the IEB and the assessment specialists.

Chapter six will analyse the extent to which this research has achieved its aims and consider the problem factors that have been identified in the process of conducting it as possible subjects for future research.

**Chapter 6 - Summary,
Conclusions and Reference List**

6.1 Introduction

With the birth of the new democracy and the drafting of a new Constitution, education in South Africa needed to be updated in order to reflect the new dispensation. Even without such dramatic change, the old education system was outdated in that it did not adequately preparing learners for either tertiary education or the world of work.

Change is never easy or uncomplicated. The proposed changes to OBE necessitated a paradigm shift in education which was met with suspicion and apprehension by Educators. This was fuelled by many factors: a lack of transparency from the side of the Department of Education, inadequate training, and negative coverage in the media being major contributors to the problem. The cost implications and lack of resources at disadvantaged schools exacerbated the issue but with 2008 looming when the first grade 12s were to write the National Senior Certificate, the sense of urgency increased and pockets of change started happening all over the country. Individual Educators, schools and training providers started implementing change and slowly the tide turned.

As discussed in chapter three, the IEB as an assessment body is more flexible than the DoE and it took a leading role in implementing change, setting exemplars and providing training for both private and public school Educators in the process of implementing this change. **The researcher**, who was initially as apprehensive as most other Educators who had completed their formal tertiary education without any OBE training, found herself involuntarily in a leadership role as **portfolio moderator**. With the urgency of imminent change, this role within the examination panel became part of the team that had to develop the SAGs and provide the subject specific guidance to the IEB Business Studies Educators.

During the course of fulfilling this role, many issues arose that needed clarification and it necessitated both additional research and extensive training in order to grapple with these concepts. There was also the awareness that in all other subjects and every other school, the same questions needed to be answered.

6.2 Purpose of the Research

This research was therefore aimed at documenting the specific case study of how the IEB grappled with implementing the portfolios to represent the SBA component of the promotion mark, in the hope that others can learn from and build onto it of having to start from scratch.

6.3 Methods of Research

Initially a **literature study** was done in order to clarify the relevant concepts. This was followed by a **case study** on portfolio moderation in Business Studies in the IEB.

6.3.1 Literature Study

The following concepts were deemed important in the understanding of both OBE and the specific way in which it was integrated into the South African educational system. As a result, they formed the basis of this research:

6.3.1.1 OBE as an Educational System

Outcomes-based Education, as proposed by Spady (1993:ii), aims to provide the opportunity for learners to attain clearly set outcomes in order to achieve at predetermined levels.

6.3.1.2 Business Studies as a FET subject

Business Studies is a commercial subject which aims to prepare FET learners to become successful economically active citizens in their chosen careers and in so doing, contribute to the growth of the South African and international economies.

6.3.1.3 Assessment in OBE

Assessment, which is the process used to evaluate learners performances in tasks and examinations, has been formalised under the OBE system and requires meticulous setting of assessments with accurate recording and reporting of results.

6.3.1.4 The IEB as an Assessment Body

The IEB is the largest independent assessment body in South Africa, and together with the DoE falls under the jurisdiction of Umalusi.

6.3.1.5 School Based Assessment (SBA)

Many learners' marks are compromised by a lack of examination skills; hence SBA seeks to provide the opportunity for learners to do a variety of formative tasks which are based on a broad spectrum of skills.

6.3.1.6 Portfolios

Prior to 2005, matriculation examinations accounted for 100% of the promotion mark for learners at grade 12 level. From 2005 onwards, portfolios were introduced (in all major subjects) which provided evidence of learners' SBA for the year. These now contribute 25% of the final promotion mark towards the NSC.

6.3.2 The Empirical Study

The **case study** included the following:

6.3.2.1 Postulates

- i. Assessment is a complex and multi-faceted process with a subjective element that needs to be acknowledged and provided for in setting up the Assessment tools.
- ii. South Africa is a country in turmoil both politically and economically. This has a direct bearing on learners, Educators and the educational system.
- iii. OBE as a system is generic; there are many formats in which it has been applied to a greater or lesser extent in different countries throughout the world. It is therefore not possible to make direct comparisons with any one system in any country.

- iv. The political, economic and education situation in South Africa is unique:
- It is a young democracy which has seen an immense amount of change in virtually every area of life, including socio-economic.
 - It has a multi-lingual and multi-cultural population.
- v. In South Africa, the basic premise of OBE has been adopted with the implementation method of using the National Curriculum Statements with Learning Outcomes and Assessment Standards for the FET phase.
- vi. Assessment in South Africa is under the jurisdiction of Umalusi which is appointed by SAQA to administer standards that have to adhere to the requirements of the NQF. These are assessed through registered assessment boards. For the purpose of this research, the IEB as an assessment board will be looked at specifically.
- vii. Assessment varies considerably in different subjects - this research will specifically be looking at Business Studies at FET level.
- viii. The grade 12s of 2008 will be the first to write the new National Senior Certificate.

6.3.2.2 Selection of Participants

The group of schools who do Business Studies within the IEB is a closed group (111 of the 159 IEB schools do Business Studies), so there was no selection of participants. In addition, the case study concentrated on the quality of the process involved, not quantitative research.

6.3.2.3 Documentation of Case Study

The documentation of the case study covers the period from 2003 (when the first portfolio moderators were appointed in the major subjects in the IEB), up to and including 2008, when the first grade 12s wrote the NSC. It looks at both the supporting structures and the processes that have been established in order to moderate the SBA through portfolios.

6.4 Results of the Literature and Empirical Studies

The results of the literature and empirical studies were as follows:

- The process of assessment is complex and multi-faceted. It has a subjective element that needs to be acknowledged and provided for in setting up the assessment tools.

Results of the research supported this postulate.

The literature study revealed that, with the introduction of OBE, assessment has become more formalised and detailed reporting structures, including aspects such as levels of achievement support this premise.

In the empirical study, the intricate moderation structures which have been put in place by both schools and the IEB pay tribute to the complexity of the process. Each assessment includes both compliance and an 'assessment for standards' aspect. The compliance component is simple to verify on a checklist, but the standard has to be moderated through more complex marking grids such as rubrics in order to verify that the criteria have been met. As a result, the assessment tool that is used needs to be set up in such a way that it provides guidelines and defined criteria in order to negate the subjectivity of the assessor.

- South Africa is a country in turmoil both politically and economically, and this has a direct bearing on learners, Educators and the educational system.

Results of the research supported this postulate.

The literature study bears witness to the very limited success in implementing OBE in South Africa. This is directly linked to the political and economic issues of the past. The legacy of Apartheid education is still having an impact on the learners of today who come from homes where their parents had little or no education. The current generation of underprivileged learners has not had adequate early-childhood learning and do not have parents that can help with homework, provide resources or even proper nutrition which is essential for optimum learning.

The current (2009) world-wide economic crisis is also affecting the daily lives of learners and the resourcing of schools.

The empirical study has shown that the IEB has, since its inception, been involved in addressing the short-comings in education. Not only does it provide training and assistance to departments which are not up to standard, but also work in partnership with the DoE and Umalusi in setting standards and policies. In addition, the many conferences quoted in this research show willingness on the part of the IEB to access the experience of Educators from other countries who have implemented the OBE system.

- OBE as a system is generic and there are many formats in which it has been applied to a greater or lesser extent in different countries throughout the world. It is therefore not possible to make direct comparisons with any one system in any one country.

Results of the research supported this postulate.

Every country is unique in the composition of its population and the needs of its economy. Notwithstanding the fact that 167 countries have introduced OBE, it has had to be adapted for each specific requirement. The literature study has discussed the fact that the countries where OBE was first introduced and used were all mono-linguistic, so South Africa's 11 official languages complicates the way it is implemented here immensely. Even a country like Singapore that has multiple languages is not comparable to the extent with which that single factor affects South Africa. Just a few examples of some of the other factors which will affect the ability to compare countries are: literacy levels, the economy, cultural influence and levels of technology.

The empirical study has looked specifically at the way the IEB has interpreted the NCS for Business Studies, with **Appendix B** detailing the SAG which it has accepted. This SAG was initially approved by Umalusi will also ratify the annual review of the document in the future.

The DoE, although working from the same NCS, has issued a separate SAG for Business Studies which is used to examine within the schools writing the government examinations.

- The political, economic and educational situations in South Africa are unique:
 1. It is a young democracy which has seen an immense amount of change in virtually every area of life, especially in the socio-economic arenas.
 2. It has a multi-lingual and multi-cultural population.

Results of the research supported this postulate.

Throughout the literature research there has been numerous discussions highlighting the unique challenges that South Africa faces:

- The democratic government voted in during the historical 1994 elections ensured a new Constitution under which the old education system would have been illegal. This led directly to the urgency of changing the system the government took the lead from other countries who had instituted OBE in recent years.
- The 'Rainbow Nation' that is South Africa is more culturally and linguistically diverse than most nations on this planet. With 11 official languages, many indigenous tribes and even more immigrants, this diversity results in both opportunities and problems. In the context of education, however, it has hampered the implementation of the new system due to difficulty of understanding the language (including all the acronyms) of OBE, as well as complicating the training of Educators.

The empirical study has shown the IEB was birthed specifically to address the political issues relating to the multiple education departments under Apartheid. As was shown by this research, the IEB has always been multiracial and currently (2008) addresses the multi-lingual issues in South Africa by being the only assessment board that examines the non-official languages.

This gives the opportunity to all foreign learners to write examinations in their own language of choice.

- In South Africa, the basic premise of OBE has been adopted with the implementation method of using the National Curriculum Statements with Learning Outcomes and Assessment Standards for the FET phase.

Results of the research supported this postulate.

The literature study has looked at the documentation relating to the introduction of OBE, including the SAQA Act and the green and white papers on education presented in various Government Gazettes. It has also looked at the fact that in schools across the country, old syllabi and textbooks have been abandoned and even in the under-resourced schools the little they do have is OBE related. All current textbooks and resources are grounded in the NCS, and assessment is based on the LOs and ASs for each subject within the FET phase. The support structures for this are built up from the Foundation phase through to the GET phase, each with their own specific criteria.

The IEB's commitment to OBE is evident in the SAG which is referred to in **Appendix B**, which has criteria based on the LOs and ASs for Business Studies. The variety of OBE related topics of the various conferences hosted by the IEB and quoted in this empirical research are also proof of the IEB's buy-in to the process.

- Assessment in South Africa is under the jurisdiction of Umalusi, which is appointed by SAQA to administer standards that have to adhere to the requirements of the NOF. These are assessed through registered assessment boards. For the purpose of this research, the IEB as an assessment board will be specifically looked at.

Results of the research supported this postulate.

The case study which was used specifically targeted the IEB as an assessment body. Throughout the literature research it has explored its relationships with the other relevant institutions such as Umalusi, SAQA and the NQF. The jurisdiction of Umalusi is also seen in the number of audits and quality assurance processes the IEB have undertaken in the past few years in order to monitor the implementation of the OBE system within the South African education system.

- Assessment varies considerably in different subjects - this research will specifically be looking at Business Studies at FET level.

Results of the research supported this postulate.

Business Studies is one of 29 subjects within the FET and the literature study has looked at the way in which it has changed to incorporate new teaching and assessment methods in line with the OBE philosophy. The study has also touched on some of the different aspects of other FET subjects, such as oral moderators for the languages, the implementation of the GIS systems in Geography and the introduction of Computer Accounting.

In the case study it is apparent that Business Studies as a subject aims to specifically include tasks which link with the requirements of tertiary education and the working world. This is done in order to build skills that will be more valuable to learners in their future careers than the amassing of knowledge which was emphasised in the old dispensation. Other subjects have different requirements, although there is a commonality of skills, attitudes and values that should be transferable between subjects. Subjects such as English and Life Orientation have more overlap with Business Studies than, for example, Physical Science.

- The Grade 12s of 2008 will be the first to write the new National Senior Certificate across all examination boards.

Results of the research supported this postulate.

The grade 12s are currently (November 2008) writing the first National Senior Certificate examinations and the literature study has traced the process that has led to this important milestone in South African education. During the examination period, there was a renewed interest in OBE, and both proponents and critics of the system are poised to comment on the results as soon as they are released.

Both the IEB and its examination panels are prepared for the 2008 marking session which starts on 3 December 2008. Change has been evident in the formatting of and approach to examination papers. For the first time it has been necessary for the IEB to run formal training sessions prior to marking in order to standardise.

6.5 Limitations of this Research

OBE is a national roll-out of a new education system which affects all formal education and industry training in South Africa. This research however concentrated on a microcosm of the OBE roll-out and was limited by several factors:

- The research concentrated on processes and procedures and did not quantify any data.
- Only the 159 IEB-registered schools were included in the aspects of the case study relating to general issues. For example, the IEB procedures for moderation.
- Only schools who offered Business Studies were included in the more specific aspects of the study. This includes 111 of the 159 IEB schools, for which 2460 candidates wrote the NSC Business Studies examinations in 2008.

- Although examinations form part of SBA, this research placed more emphasis on the formative assessments within the portfolio.
- The grade 12 NSC examinations were alluded to, but the immense changes in the format and approach within these examinations were not discussed in detail as it fell outside the scope of this research.

6.6 Recommendations for Further Research

The initial process of implementing OBE in schools has reached its conclusion with the 2008 NSC, but the process of refining it will continue. Each stage that has been accomplished has revealed lessons to be learnt and it is impossible to address all the issues raised simultaneously. Some of the problems identified which would be suitable for further research include aspects relating both to Business Studies as a subject and to the broader field of FET education.

6.6.1 Recommendations Specific to Business Studies

- Refinement of the SAG document as it has now had the opportunity to run for a year, so there are application aspects which need to be included;
- The opportunity to introduce projects which are better aligned with the requirements in industry. For example, Project Management techniques.
- Improving Educator training. One of the problems within the commercial subjects is that most Educators have never worked within the business world and teach from a theoretical perspective. Business simulation courses, job shadowing or a mentorship program which links directly with business executives would enable these Educators to teach from a more realistic perspective.
- With the DoE and IEB already working together in so many aspects, it would be to the benefit of both Business Studies departments to forge a relationship and work together in order to share resources and set the standards for the subject within FET in South Africa.

- **The researcher** believes that there is a case to be made for a specific fusion of Multiple Intelligences which apply specifically to what is known in the business world as 'business acumen'. A sportsman, musician or linguist may be gifted in one sphere, and able to be successful in isolation from other strengths. But the successful business executive needs to have a multiplicity of strengths, especially in the global, technologically-advanced and highly competitive world in which we live.

No entrepreneur can turn a specific interest or ability into a successful business without at least:

- good interpersonal skills with clients, employees and suppliers alike
- intrapersonal understanding and coping mechanisms
- linguistic ability to communicate both verbally and in writing
- other skills dependant on the nature of the business

Even if a business executive is lacking in one of the above, the very ability to identify a shortcoming within oneself and develop a strategy to counteract it (for example, a lack of Logical–mathematical intelligence resulting in employing an Accountant) is a sign of intrapersonal intelligence.

6.6.2 Recommendations for the FET Band

- Many of the IEB schools have the resources to adapt to OBE with ease, and there is the opportunity for them to partner with underprivileged schools in their communities in order to assist them with the process. The resources and documentation that is being developed (such as, by way of example, the SAG on **Appendix B**) could be applied on a broader scale.
- Standardisation of resources. The change to OBE has afforded many entrepreneurial opportunities, and it is imperative that there is a streamlining of resources.

Some of the textbooks, courses and training that are available at the moment are sub-standard but because Educators do not have adequate experience of the system, they are unable to identify these problems.

- Multiple Intelligence theory is still not an integral part of formal Educator training, and is therefore not adequately utilised in the classroom. This means that learners are not afforded the opportunities to be assessed according to their individual strengths.
- OBE has high ideals which – as discussed in this research - are impractical for a large number of disadvantaged schools. Currently it is creating an even greater divide between the schools at the top end of the scale and those at the bottom. It is a matter of urgency to simplify both the system and the language associated with it in order to make it more accessible to the masses.

According to SADTU (South African Democratic Teachers' Union) the drop in the matric pass rate from 65% in 2007 to 62.5% in 2008 is cause for concern (SAPA 2008). In contrast to the opinions of many who are calling for the scrapping of OBE, the practicalities of the time, money and human resources already invested in it and *the lack of a better alternative* means that it will have to be fine-tuned, not replaced. SADTU also acknowledges that it is the lack of resources and problems with the way in which the system is implemented (particularly in rural and disadvantaged schools) that needs to be addressed with a sense of urgency.

- The increasing effect of globalisation on the economies of the world is setting new challenges which will have to be faced by the learners of today. An interesting question posed by Clem Sunter ([online] 2008) – would form a useful basis for further study. He asked (brackets added by **researcher**):

“If China succeeds in becoming a superpower, how do they rate success (*in other words, how do they approach assessment*) and how will that affect the rest of the world and Africa in particular?”

6.7 Conclusion

The challenges facing education in South Africa are daunting and should not be underestimated. The lofty ideals of OBE have not resulted in significant upliftment of underprivileged schools as yet.

In addition, the current political and economic volatility is further threatening the distribution of resources and provision of improved education. *The Times* reported on 23 November 2008 (Govender [online] 2008) that South Africa needs 20 000 new Educators a year in order to address the current shortage of staff. However, of the 6 000 that qualify annually, only 4 000 actually go into the profession locally. This, together with the number of Educators changing professions and dying of HIV/AIDS, will lead to a shortage of 94 000 Educators by 2015.

The positive aspects of OBE are, however, often underplayed. In the process of implementation most Educators have proved to be resilient, flexible and innovative. The case study in this research is evidence of that as the subject-specific successes were all based on a cross-pollination of ideas from other subjects and departments. Pockets of excellence exist at many levels:

- Principals who have been understanding and willing to accommodate the increased assessment and moderation pressures through improving technology, streamlining reporting systems and providing training for staff.
- Schools with innovative projects ranging from creative research to linking with local business communities to tap into local resources.
- Educators who have established networks (both physically and electronically) in order to share the load of developing new materials.
- Training which has been done, not only formally by assessment bodies and training organisations, but informally by Educators willing to share from their own experience and successes.

- Assessment bodies that have provided training and support through aspects such as exemplars and the distribution of information, as well as working in consultation with the Educators under their care.
- With the freedom of moving away from prescriptive textbooks and syllabi, even under-resourced schools have taken up the challenge to be more creative by using indigenous materials to teach skills and tap into cultural heritages and local traditions.
- With the pressures of the impending change, more businesses have become involved in sponsoring resources and upgrading local schools.
- The emphasis in many of the new National Curriculum Statements is providing an answer to the problem in itself. Subjects (for example Business Studies, Life Sciences, English and Life Orientation) which include sections such as ethics and social responsibility have created better awareness of the world for the current learners. This awareness of HIV/Aids and other social issues is motivating learners to get actively involved - contributing time and effort, or collecting money and resources for worthy causes.

The battle is, however, far from won. Time has been a disabler for many Educators, and there are as yet no perfect SAGs or portfolios that are 100% compliant. Educators are still grappling with questions around the setting of assessments to accurately reflect the levels of achievement; or incorporating questions to cater adequately for both higher and lower order thinking skills. As a result of these pressures, most Educators have been introspective and often not confident enough to share their assessments and insights. This will, however, improve as OBE moves into its second year of the National Senior Certificate.

In the past, education has attempted to force all learners into learning through generic, boring methods which made Albert Einstein lament the fact that it is 'a miracle that curiosity survives formal education' (Einstein [online] 2008). But more than ever before, the Educators of today are the custodians of the future, building the foundation with the next generation of learners who are going to have the power to make the decisions which will affect the way the world develops.

Hoffer puts in eloquently when he says: “In times of change *learners* inherit the earth; while the *learned* find themselves beautifully equipped to deal with a world that no longer exists.” (Emphasis added by **the researcher**: Hoffer [online] 2009)

It is the hope of **the researcher** that this research will contribute in a small way towards a better understanding of the doors that OBE can open, especially within Business Studies as a subject. With the rapid changes in the business world due to a variety of factors such as globalisation (including problems such as the current – 2008 – global economic crisis and global warming) and technological advancement, it is imperative that learners are better prepared for both tertiary education and future career paths. The new assessment methods, which allow for a greater variety of skills and knowledge to be applied, will allow the learners graduating from the FET phase in 2008 and later to be better prepared for the future that awaits them.

In addition, the emphasis of important factors such as linking attitudes and values to the way in which learning is synthesised will also be of immense benefit to these learners in the future. As South Africa moves into the next phase of adapting OBE to its own needs, there must be more sharing of resources and training in order to make education more meaningful and fair for each individual learner. The IEB, with the vast majority of its schools being well resourced, takes its moral obligation to develop and share resources with the public sector seriously.

For education world-wide, the future holds many exciting challenges and great possibilities. With the internet explosion which is currently revolutionising the way teaching is done and the move towards self-learning, the Educators of today have the opportunity to, as suggested by Mohandas Gandhi: “**Be the change that you want to see in the world**” (Gandhi [online] 2008).

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Appendices A - D

Appendix A

Summary of NCS for Business Studies

As the full NCS(National Curriculum Statement) is a lengthy document, the following summary of Learning Outcomes and their associated Assessment Standards is given by way of illustration (Source: Meyer, Topper & Russell 2009b:8-11):

NOTE: Shaded blocks show where there is no follow through or continuation of a theme.

		<u>Grade 10</u>	<u>Grade 11</u>	<u>Grade 12</u>
		LO1: Business Environments Demonstrate knowledge and analyse the impact of changing and challenging environments on business practice in all sectors.	10.1.1 Micro, Market, Macro Environments Identify components in each environment and discuss the relationships between them.	11.1.1 Micro, Market, Macro Environments Compare and describe extent of business's control.
10.1.2 Features of Environments Analyse and explain the features in each environment in detail.	11.1.2 Adapting to challenges in Environments Integration & Challenges			
	10.1.3 Contemporary Socio-Economic issues Identify and discuss these issues and their impact on business.	11.1.3 Socio-Economic issues: Analyse and interpret the impact and challenges these issues represent and make business decisions for specific business situations.	12.1.2 Social Responsibility Critically examine Social Responsibility issues and its implications for both business and communities. (+ 12.3.8)	
			12.1.3 Impact of recent legislation on redress and equity in businesses. Analyse the impact on small and big business.	
	10.1.4 Nature of business: Primary, Secondary & Tertiary Investigate and classify the nature of business in the vicinity.	11.1.4 Links between Primary, Secondary & Tertiary Identify and investigate the links between enterprises in these sectors.	12.1.4 Apply Micro, Market & Macro Environments Select a business from each sector and describe how they relate to the three environments and the extent to which the business can control them. (+ 12.1.1)	

*

HR Management and Industrial Relations touch on all of the following AS's:

12.1.3, 12.2.2, 12.4.1, 12.4.2, 12.4.3

New Assessment Methods in Business Studies in the FET Phase

LO2: Business Ventures Identify and research viable business opportunities and to explore these and related issues through the creation of achievable business ventures	Grade 10	Grade 11	Grade 12
	10.2.1 Design and use research instrument Assess needs and wants in an identified environment.	11.2.1 Entrepreneurial Qualities Analyse the degree to which a business embraces Entrepreneurial qualities.	12.2.1 Entrepreneurial Success Critically reflect on a business venture, assess its entrepreneurial qualities, and identify success factors and areas for improvement.
	10.2.2 Business opportunities and SWOT analysis Identify possible business opportunities (based on results in 10.2.1) and apply a SWOT analysis to determine a viable business venture.	11.2.2 Business Plans to action plans (including Gantt charts and Time lines) – Collaboratively or independently. 11.2.3 Start a business venture, based on an action plan – collaboratively or independently.	
	10.2.3 Develop Business Plan (including a financial analysis) that can be implemented.		12.2.2 Human Rights, Inclusivity and Environmental Issues: Analyse & evaluate the extent to which business venture addresses human rights, inclusivity and environmental issues.★
	10.2.4 Business Location Factors – investigate and debate factors that impact on location decisions.		12.2.3 Present Business-related information: Clearly and accurately in a variety of Verbal and Non-verbal formats, including graphs, respond professionally to questions and feedback, and amend information as necessary.
	10.2.5 Present a variety of Business-related information: Clearly and accurately in a variety of Verbal and Non-verbal formats, including graphs.	11.2.4 Present Business-related information: Clearly and accurately in a variety of Verbal and Non-verbal formats, including graphs, and be able to respond professionally to questions and feedback.	12.2.4 Investment and Insurance: Investigate a range of available business opportunities. Distinguish between Assurance and Insurance (Compulsory and Non-compulsory) & discuss viability and relevance for individuals and businesses.
	10.2.6 Relevance of contracts: And their legal implications in different business contexts.	11.2.5 Investigate Avenues of acquiring business: Franchising, Outsourcing, leasing. Discuss Advantages, Disadvantages as well as their contractual implications. Relevance of contracts.....>	12.2.5 Forms of Ownership Determine the extent to which a specific FOO can contribute to business success.
	11.2.6 Forms of Ownership: Discuss benefits and challenges of establishing a Company versus other choices – (including tax issues).		

★ HR Management and Industrial Relations touch on all of the following AS's:

12.1.3, 12.2.2, 12.4.1, 12.4.2, 12.4.3

New Assessment Methods in Business Studies in the FET Phase

		Grade 10	Grade 11	Grade 12
		LO3: Business Roles	Demonstrate and apply contemporary knowledge and skills to fulfil a variety of business roles.	<p>10.3.1 Creative Thinking How it can contribute towards successful and sustainable business practice.</p> <p>10.3.2 Use Creative Thinking to generate entrepreneurial opportunities and to solve business problems.</p>
			<p>11.3.2 Professionalism and ethics in business environments. Theories and Principles.</p> <p>11.3.3 Apply Principles and skills of Professional, responsible, ethical and effective business practice to carry out business ventures.</p>	<p>12.3.2 Business Ethics Discuss and debate Professionalism, ethics and effective business practice in changing and challenging business environments.</p> <p>12.3.3. Reflect and make recommendations for improvement on situations and activities. @</p>
		<p>10.3.3 Self-Management Analyse the concept and discuss how it is relevant in a business context.</p>	<p>11.3.4 Stress, crisis and change management principles. Explain and apply concepts.</p>	<p>12.3.4 Management and Leadership Differentiate between different styles and approaches.</p> <p>12.3.5 Conflict Management Apply conflict management skills to resolve differences in business situations.</p>
		<p>10.3.4 Assess self and identify possible business careers that are interesting.</p>	<p>11.3.5 Business Careers & Personal Growth Research business careers and identify paths for personal and career growth and advancement.</p>	<p>12.3.6 Business Careers and Career Paths Select and motivate a choice of possible careers and associated career paths.</p>
		<p>10.3.5 Identify ways in which people need to work together to accomplish business objectives and discuss factors that can influence these relationships (e.g. prejudice, beliefs, values and diversity)</p> <p>10.3.6 Team Performance Criteria. Identify criteria for successful and collaborative team performance in a business context and assesses a team against this criteria.</p>	<p>11.3.6 Team Dynamics Describe Team dynamic theories and use them to analyse specific business-based case studies.</p>	<p>12.3.7 Teamwork Collaborate with others towards achievement of specific objectives.</p>
		<p>10.3.7 Contribute responsibly to immediate community – identify ways in which a business can contribute responsibly towards its immediate community.</p>	<p>11.3.7 Citizenship roles Analyse these roles and responsibilities of business practitioners in a business environment.</p>	<p>12.3.8 CSR Business Project Meaningfully contribute time and effort to advancing the well-being of others in a business environment. (+ 12.1.2)</p>

@ AS 12.3.3 is application-based and could be linked to any other sections.

New Assessment Methods in Business Studies in the FET Phase

LO4: Business Operations Demonstrate and apply a range of management skills and specialized knowledge to perform business operations successfully.	Grade 10	Grade 11	Grade 12	
	<p>10.4.1 Business Functions: Identify and briefly discuss the eight business functions.</p> <p>10.4.2 Interrelatedness of Functions: Analyse how business functions are interrelated and how they operate in small, medium and big business contexts.</p>	<p>11.4.1 Marketing Function: Analyse and discuss the following aspects:</p> <ul style="list-style-type: none"> ➤ Marketing Activities ➤ Product Policy ➤ Pricing Policy ➤ Place Policy ➤ Promotion Policy ➤ Foreign Marketing <p>11.4.2 Marketing Activity Select a Marketing Activity and carry it out to achieve identified business objective.</p>	<p>12.4.1 Human Resource Function Analyse and discuss relevant legislation and the following:</p> <ul style="list-style-type: none"> ➤ Recruitment and Selection ➤ Employee Contracts ➤ Induction and Placement ➤ Salary Administration ➤ Employee Benefits ➤ Skills Development. <p>12.4.2 Select a Human Resource Activity and carry it out to achieve identified business objective.</p>	
	<p>10.4.3 General Management: Identify the levels and tasks of General Management and use this information to analyse these within a public or private organisation.</p>			<p>12.4.3 Industrial Relations Investigate developments in IR and relate to contemporary business practice.</p>
	<p>10.4.4 Other Functions: Analyse and explain the following functions and their importance in achieving business objectives:</p> <ul style="list-style-type: none"> ➤ Administration ➤ Financing ➤ Purchasing ➤ Public Relations 		<p>11.4.3 Production Function Analyse and discuss the following aspects:</p> <ul style="list-style-type: none"> • Systems • Production Planning • Safety Management • Quality Control • Production Costs 	<p>12.4.4 Quality Performance Analyse how quality of performance in a business can affect success or failure.</p>

*

HR Management and Industrial Relations touch on all of the following AS's:

12.1.3, 12.2.2, 12.4.1, 12.4.2, 12.4.3

Appendix B

Business Studies IEB Subject Assessment Guidelines

The following document is taken from the IEB website (www.ieb.co.za), and constitutes the SAG as developed and implemented by the transitional examination panel (2006 – 2008). It was given to Educators at the National Subject Conference in 2007 and contains the following (which is colour-coded for ease of reference):

Key to Colour Coding:	
PURPLE	National Curriculum Statement
BLACK	Standard IEB documentation
GREEN	Developed by Examination Panel
BLUE	Developed by the Researcher

- Section A, B and C: Summary details of Assessment requirements. This was adapted for Business Studies according to the required guidelines, and includes:
The Actual Assessment Syllabus: The Learning Outcomes and Assessment Standards as issued in the NCS; Plus the IEB guidelines as developed by the Examination Panel.
- Section D: This includes both standard documentation, and documentation which is subject specific to Business Studies as developed by the Researcher, and edited by the Examination Panel.

NOTES TO APPENDIX B:

During 2008 this document was reviewed, as it will be each year, but at time of submission these additions were not yet Umalusi approved, and are therefore not included.

The document is taken as presented on the website: it was not edited for language or spelling. Only colour changes, blank lines deleted and some font sizes were changed to facilitate ease of reference for the purpose of this dissertation.

The “Learner Portfolio Cover Sheet” is available to Educators as an interactive Excel Sheet which calculates the weightings, levels and averages automatically once the marks are entered.

New Assessment Methods in Business Studies in the FET Phase

BUSINESS STUDIES

A. MEANS OF ASSESSMENT

Paper 1: Application of Business Knowledge	2 hours	[200]
Paper 2: Problem Solving and Analysis	2 hours	[100]
Portfolio		[100]

400 marks

B. REQUIREMENTS

1. Examination

Paper 1: 2 Hours – 200 marks	Paper 2: 2 Hours – 100 marks
Weighting: LO 1: 25% LO 2: 25% LO 3: 25% LO 4: 25% A leeway of 5% per outcome in the external assessment to accommodate the integration of outcomes across questions.	Weighting: LO 1: 25% LO 2: 25% LO 3: 25% LO 4: 25% A leeway of 5% per outcome in the external assessment to accommodate the integration of outcomes across questions.

Cognitive levels:

Mark allocations per cognitive level in external assessment:

Knowledge	30%
Understanding and Application	30%
Analysis and Synthesis	25%
Evaluation and Problem solving	15%

PAPER 1: Application of Business Knowledge – 2 hours – 200 marks

Paper 1 will have a greater emphasis on theory.

Section A: (Compulsory)

[50]

- ⇒ Different types of questions, e.g. multiple choice, true or false, matching columns and terminology.
- ⇒ These questions may be source based.
- ⇒ Learning Outcomes will carry (more or less) equal weightings.
- ⇒ Allow for different questions to count different marks, e.g. a true answer may only count 1 mark but a false answer with a reason 2 or 3.

⇒ Section B: (Compulsory)

[150]

- ⇒ This section will consist of THREE compulsory questions of 50 marks each.
- ⇒ Shorter type questions, e.g. list, explain and discuss.
- ⇒ These questions will cover all the Learning Outcomes (more or less) equally.
- ⇒ Case studies or source based questions will be included.

PAPER 2: Problem Solving and Analysis – 2 hours – 100 marks

Paper 2 will focus to a greater extent on problem solving.

- ⇒ two questions covering all the LOs more or less equally but not necessarily one LO per question.
- ⇒ The focus will be on the use of scenarios which lend themselves to higher cognitive questions. The responses required are longer in nature and rubrics, together with marking guidelines, may be used to assess these answers.
- ⇒ Both questions are compulsory (50 marks each).

Business Studies FET is a THREE year course and as such the learners should have an understanding of all terminology and aspects which form the introduction to, and basis of, all the Grade 12 Assessment Standards.

2. PORTFOLIO [100]

Each candidate must submit a portfolio which contains the following evidence:

Component	Weighting
Primary Research Task	20%
Secondary Research Task	20%
Oral/Debate	10%
Elective	5%
Two controlled tests	20%
Midyear or preliminary examination	25%

All these assessments must be designed in such a way that they assess across the Learning Outcomes and Assessment Standards, and cater for the cognitive ability of all learners.

C. INTERPRETATION OF THE REQUIREMENTS

1. Examinations

1.1 Rationale for two papers

An outcomes based assessment should use assessment methods that are able to accommodate divergent contextual factors. Having two differently structured papers allows the examiner the opportunity to use a variety of assessment instruments and methods to more accurately assess the competencies, knowledge, skills and values of the learners in the context of Business Studies while incorporating Developmental and Critical Outcomes.

Paper 1 will focus to a greater extent on assessing theoretical knowledge which underpins the understanding and application thereof.

Paper 2, which has a more practical slant, will allow a proper analysis of a case study (or case studies) to be done and the candidate will be required to solve problems and give opinions, i.e. the paper will test the higher levels of Blooms taxonomy. The analysis and interpretation of case studies, and, for example, the writing of reports and the solving of problems requires critical and creative thinking. This demands more time and necessitates the higher time-mark ratio allocated.

1.2 Assessment Syllabus

The Learning Outcomes and Assessment Standards that need to be achieved in grade 12 are prescribed, however the depth and detail required to achieve these are not stipulated and this makes it difficult for the IEB to design common assessment tasks at grade 12 that will fairly and effectively assess all learners. The purpose of this Assessment Syllabus is to assist IEB teachers in reaching a common understanding of the scope of the Assessment Standards and therefore support schools in planning their Assessment Programs consistently; as well as to make the IEB examination and portfolio requirements at grade 12 explicit for teachers, assessors and moderators.

This document is NOT a teaching and learning syllabus but rather a scoping of the Learning Outcomes and Assessment Standards for assessment purposes. The teaching and learning programme should be richer and contextualised for the learners to stimulate and challenge them. The assessment syllabus will, furthermore, be flexible and subject to change to reflect the current market situations.

The Assessment Syllabus follows the portfolio requirements.

2. Portfolio

New Assessment Methods in Business Studies in the FET Phase

Portfolio Component Items	Weighting	Recommended Hours	Criteria	Notes
<p>1. Primary Research Task</p> <p>Defined as Field Research or data and information that the learners have gathered, analysed, interpreted and presented themselves.</p>	20%	4-6	<p>Criteria for Assessing Learners' work:</p> <p>Research Component:</p> <ul style="list-style-type: none"> • Bona Fide Field Research done • Research relevant to topic/question • Research aim stated • Minimum of two appropriate sources of data/information used • Data collection method specified <p>Written Component:</p> <ul style="list-style-type: none"> • Index provided • Rationale for research provided • Summary of raw data provided • Analysis of data provided • Discussion of findings included • Conclusion provided • Glossary provided • Reference list provided • Anti-plagiarism statement provided • Authenticity statement provided 	<p>Primary research may be done in groups (not more than 4 learners/group)</p> <p>Groups must indicate role allocation and contributions of group members by including an organisational chart, minutes of meetings etc.</p> <p>Data Analysis</p> <p>Could include graphs, pie charts, tables, etc.</p> <p>Reference List</p> <p>Includes various types of sources presented in the correct format. A bibliography includes only books.</p>

New Assessment Methods in Business Studies in the FET Phase

			<p>Criteria for Assessing Design:</p> <p>Does Project show:</p> <ul style="list-style-type: none"> • Validity – task matches LOs and ASs targeted? • Sufficiency - assess across LOs? • Rigour – cover all cognitive levels in 60 Lower Order: 40 Higher Order ratio? • Appropriateness – appropriate for this grade/these learners (language, contexts, etc.)? • Marking Guidelines – are these fit for purpose (appropriate tools, sufficient rigour)? • Applied contexts – require learners to work in unrehearsed/unfamiliar contexts? 	<p>Currency of information</p> <p>This is crucial in Business Studies where economic trends and other factors constantly change. All work should be dated to indicate time relevance.</p>
<p>2. Secondary Research Task</p> <p>Defined as Desk Research or data and information that the learners have gathered from various sources and then analysed, processed and presented to respond to a question or problem posed.</p>	<p>20%</p>	<p>5-7</p>	<p>Criteria for Assessing Learners' work:</p> <p>Research Component:</p> <ul style="list-style-type: none"> • Bona Fide Desk Research done • Research aim stated • Minimum of three appropriate sources of data/information used <p>Written Component:</p> <ul style="list-style-type: none"> • Index provided • Rationale for research provided • Summary of raw data provided • Analysis of data provided • Discussion of findings included • Conclusion provided • Glossary provided • Reference list provided • Anti-plagiarism statement provided • Authenticity statement provided 	<p>Secondary research must be done individually.</p> <p>Data Analysis</p> <p>Could include graphs, pie charts, tables etc.</p> <p>Reference List</p> <p>Includes various types of sources presented in the correct format. A bibliography includes only books.</p>

New Assessment Methods in Business Studies in the FET Phase

			<p>Criteria for Assessing Design:</p> <p>Does Project show:</p> <ul style="list-style-type: none"> • Appropriate research question or problem that discourages plagiarism? • Validity – task matches LOs and ASs targeted? • Sufficiency - assess across LOs? • Rigour - cover all cognitive levels in 60 L/O: 40 H/O ratio? • Appropriateness - appropriate for this grade/these learners (language, contexts etc.)? • Marking Guidelines – are these fit for purpose (appropriate tools, sufficient rigour)? <p>Applied contexts – require learners to work in unrehearsed/unfamiliar contexts?</p>	<p>Currency of information</p> <p>This is crucial in Business Studies where economic trends and other factors constantly change. All work should be dated to indicate time relevance.</p>
2. Oral/Debate	10%	2-3 (Time includes prep. and class participation.)	<ul style="list-style-type: none"> • Written proof of Oral/Debate provided? <p>Criteria for Assessing Design:</p> <ul style="list-style-type: none"> • Validity - assesses one or more Learning Outcomes? • Sufficiency - at least 75% of the mark must assess Business Studies competence (as opposed to competence in oral communication)? • Rigour - cover all cognitive levels in 60L/O: 40H/O ratio? • Appropriateness - appropriate for this grade/these learners (language, contexts, etc.)? <ul style="list-style-type: none"> • Marking Guidelines – are these fit for purpose (appropriate tools, sufficient rigour)? • Applied contexts – require learners to work in unrehearsed/unfamiliar contexts? • Authenticity - at least 50% of the mark must be individually based? • All group members must participate in oral component. 	<p>This is an ideal opportunity for peer assessment</p> <p>Examples:</p> <ul style="list-style-type: none"> • Discussion of either of the Research Projects. • Totally independent topic e.g. News Articles/Current Affairs • Can include PowerPoint@ presentation or other visual aids. <p>Currency of information</p> <p>This is crucial in Business Studies where economic trends and other factors constantly change. All work should be dated to indicate time relevance.</p> <p>Debate/Group Oral</p> <p>If this component is done as either of the above, groups must indicate role allocation and contributions of group members by including an organisational chart, minutes of meetings etc.</p>

New Assessment Methods in Business Studies in the FET Phase

3. Elective	5%	2-3	<ul style="list-style-type: none"> • One activity included at the teacher's discretion. For example: • Simulation or game • Worksheet • Homework • Case study • Commercial competition e.g. JSE Schools Challenge, McCain Competition. 	The activity may not be a test or examination, i.e. homework worksheets are not acceptable but interpretative case studies etc are. The task must be of sufficient rigour and substance to include 40% higher order thinking skills.
5. Two Controlled Tests	20%	2-3	<ul style="list-style-type: none"> • 50 – 100 marks each • One controlled test similar to Paper 1 of the external examination • One controlled test similar to Paper 2 of the external examination. • Tests must include Data Response type questions. • Must cover all LOs between the two tests. 	
6. Mid-year or Preliminary Examination	25%	3	Must be modeled on the IEB Subject Assessment Guidelines for the external examination.	
Totals (All 7 items)	100%	Minimum 20 hrs		

ASSESSMENT SYLLABUS GRADE 12

Learning Outcome 1: Business Environments	
Demonstrate knowledge and analyse the impact of changing and challenging environments on business practice in all sectors.	
Assessment Standards	Details
<p>12.1.1 Devise strategies for how a business can respond to the challenges of the macro business environment, critically evaluate these strategies and make recommendations as required.</p>	<p>Learners should be able to:</p> <p>Develop, and motivate their recommendations (support their judgment with reasoning) with reference to business strategies in the macro environment based on a PESTLE (Political, Economic, Social, Technological, Legal and Environmental analysis) analysis grid.</p> <p>Explain their choice and recommendation by referring to the following aspects:</p> <ul style="list-style-type: none"> • Political – Including, but not limited to political systems, war/peace, political situations in neighbouring countries, volatility and powers of government. • Economic – Including, but not limited to elements such as inflation, exchange rates, international trade restrictions. • Social – Socio-economic factors, e.g. HIV/Aids, crime, poverty and unemployment etc. • Technological – Rate of change, effect on jobs and other relevant technological factors. • Legal – Legislation (both local and international). • Environmental – Including, but not limited to pollution, "green" issues, sustainability of resources.
<p>12.1.2 Critically examine the concept of social responsibility and its implications for both business and communities.</p>	<p>Learners should be able to:</p> <p>Analyse and evaluate the relationship between management ethics and social responsibility in terms of, inter alia:</p> <ul style="list-style-type: none"> • The aspect of piracy/copyright of competitors and social responsibility • Interest groups and the demands placed on business by each interest group • Primary social responsibility vs. broad social responsibility and the areas of involvement/types of activities, e.g. Aids, pursuit of profit leading to unemployment and other problematic situations, environmental issues, anti-drug abuse campaigns, etc. • Arguments for and arguments against social responsibility

New Assessment Methods in Business Studies in the FET Phase

<p>12.1.3 Analyse the impact on small and big business operations of recent legislation developed in response to demands for redress and equity</p>	<p>Learners should be able to:</p> <p>Evaluate how the following legislative processes have impacted on the process of redress and equity in the business environment:</p> <ul style="list-style-type: none"> • SME (Small; Medium Enterprise) / SMME (Small; Medium and Micro Enterprise) / big corporations (based on different criteria such as employees and/or turnover, etc.) • LRA – Labour Relations Act • Employment Equity Act • Black Economic Empowerment (BEE) and BBBEE (Broad Based Black Economic Empowerment) • Skills Development Act (skills levies and implications on small and large business) • National Skills Development Strategy, i.e. SETA's – Sector Education and Training Authorities including but not limited to issues such as Workplace Skills Plan) • Minimum wages – This is now specified in the Sectoral Determination that forms part of the BCEA (Basic Conditions of Employment Act) so each sector covers its own min wages
<p>12.1.4 Select a business from each sector and describe the three environments related to these sectors and the extend to which a business can control these environments</p>	<p>Learners should be able to:</p> <p>Show an understanding of the degree to which a business in either the primary, secondary or tertiary sector can control and manipulate their environments with the help of tools such as:</p> <ul style="list-style-type: none"> • A SWOT (Strengths, weaknesses, opportunities and threats) analysis • The PESTLE technique • Porter's five forces model • A Balanced Scorecard (BSC)
<p>Learners should be able to use the knowledge gained in this section to demonstrate the Assessment Standards in unfamiliar/unrehearsed contexts and to solve problems.</p>	

New Assessment Methods in Business Studies in the FET Phase

Learning Outcome 2: Business Ventures	
Identify and research viable business opportunities and explore these and related issues through the creation of achievable business ventures.	
Assessment Standards	Details
<p>12.2.1 Critically reflect on a business venture, assess its entrepreneurial qualities, and identify its success factors and areas for improvement.</p>	<p>In order to critically reflect on a business venture, assess its entrepreneurial qualities and identify strengths and weaknesses, learners should be able to:</p> <ul style="list-style-type: none"> • Perform a SWOT analysis and appraise the level of control the entrepreneur has over each factor. • Identify and elaborate on critical entrepreneurial qualities. • Contrast strengths and weaknesses as they apply to different situations in different environments.
<p>12.2.2 Analyse and evaluate the extent to which a business venture addresses issues such as Human Rights, inclusivity and environmental issues.</p>	<p>Learners should be able to:</p> <p>Define, discuss and appraise how the business venture accommodate the following aspects in its effort to address human rights, inclusivity and environmental issues:</p> <ul style="list-style-type: none"> • Constitution of RSA and the Bill of Rights entrenched in it. • Labour law • OHS Act (Occupational Health and Safety Act)
<p>12.2.3 Present a variety of business-related information clearly and accurately in verbal and non-verbal format (including graphs), respond professionally to questions and feedback, and amend information as necessary.</p>	<p>Learners should be able to:</p> <p>Distinguish between components such as data, information and management information as well as Primary (Field) research and Secondary (Desk) research.</p> <p>Outline the critical aspects of flexibility and adaptability of data/info in rapidly changing business environments.</p>

New Assessment Methods in Business Studies in the FET Phase

<p>12.2.4</p> <p>(a) Investigate a range of investment opportunities,</p> <p>(b) Distinguish between assurance and insurance (both compulsory and non-compulsory), and</p> <p>(c) Discuss the relevance of these to both individuals and businesses.</p>	<p>Learners should be able to:</p> <p>Define and discuss different investment opportunities such as long term financial tools, e.g. JSE Ltd /international stock, RAs (Retirement Annuities) , endowments and off shore investments as well as short term instruments (Notice deposits and other instruments)</p> <p>Critically evaluate different investment opportunities and substantiate a choice of investment in a particular situation.</p> <p>Differentiate between assurance and insurance (both compulsory and non-compulsory), and how they relate to risk management.</p>
<p>12.2.5 Determine the extent to which a particular form of ownership can contribute to the success or failure of a business.</p>	<p>Learners should be able to:</p> <p>Evaluate the degree to which the following factors may impact on the success or failure of a business venture:</p> <ul style="list-style-type: none"> • Formation procedures and considerations • Capital requirements • Size of the enterprise • Legal persona • Liability • Tax • Management/control aspects <p>Motivate a particular choice of a Forms of Ownership</p> <p>Educators should stay up to date with changes in the business environment, e.g. co-operatives are still being listed as a Form of Ownership, but is not a reality in practice, changes in CCs etc.</p>
<p>Learners should be able to use the knowledge gained in this section to demonstrate the Assessment Standards in unfamiliar/unrehearsed contexts and to solve problems.</p>	

New Assessment Methods in Business Studies in the FET Phase

Learning Outcome 3: Business Roles	
Demonstrate and apply contemporary knowledge and skills to fulfil a variety of business roles.	
ASSESSMENT STANDARDS	SCOPE
<p>12.3.1 Apply creative thinking to respond to challenges in dynamic and complex business contexts.</p>	<p>Learners should be able to:</p> <p>Define, discuss and integrate creative thinking techniques in the process of problem solving. These techniques include:</p> <p>General techniques such as:</p> <ul style="list-style-type: none"> • DRIVE (Define, Review, Identify, Verify, Execute) or • Pro's and Con's chart (much simpler) depending on the complexity of the problem. <p>Specialised techniques (which are more appropriate in specific situations) such as:</p> <ul style="list-style-type: none"> • Drill Down • Value Analysis • Flow charts • PESTLE • SWOT analysis • Scenario analysis • Techniques previously covered such as Delphi
<p>12.3.2 Discuss and debate how professional, responsible, ethical and effective business practice should be conducted in changing and challenging business environments.</p>	<p>Learners should be able to:</p> <p>Discuss and debate the following business issues and their relevance in a rapidly changing business environment:</p> <ul style="list-style-type: none"> • Ethical theories, e.g. <ul style="list-style-type: none"> – consequence, principle, virtue and narrative • Business ethics <ul style="list-style-type: none"> – levels – accounting ethics – government ethics – financial ethics, etc. • Professional codes and behaviour (investigate different codes in different careers e.g. accounting, teaching, etc.) <p>Defend their view on the importance of ethical behaviour in a business ventures</p>

New Assessment Methods in Business Studies in the FET Phase

<p>12.3.3 Reflect on situations and activities and make recommendations for improvement</p>	<p>Learners should be able to:</p> <p>Debate/discuss issues (such as listed below) arising in modern business.</p> <p>Evaluate issues from both a profit and moral perspective.</p> <p>Show an understanding of the wider impact, e.g. on society as a whole and the economy.</p> <p>Issues may include:</p> <ul style="list-style-type: none"> • Conflicts of interest • Bribes, corruption, inappropriate gifts • Sexual harassment • Unauthorised use of funds • Taxation, e.g. evasion. • Unfair advertising • Employment/labour issues (employer and employee abuse) • Pricing of goods (discrimination) • "Insider trading"
<p>12.3.4 Difference between management and leadership styles and approaches</p>	<p>Learners should be able to:</p> <p>Differentiate between leadership and management.</p> <p>Differentiate between leading vs. "bossing"</p> <p>Discuss and elaborate on different theories/styles of leadership and management, e.g.</p> <p>– Autocratic – Democratic –Participative –Laissez-faire</p> <p>– Situational – Transactional – Transformational</p> <p>in order to support a recommendation for a best style in a particular situation.</p> <p>Evaluate the role of personal attitudes in success and leadership</p> <p>Distinguish between leaders vs. followers</p>

New Assessment Methods in Business Studies in the FET Phase

<p>12.3.5 Apply conflict management skills to resolve differences in business situations (including workplace forums).</p>	<p>Learners should be able to:</p> <p>Define and discuss the following issues relating to conflict management:</p> <ul style="list-style-type: none"> • Functional vs. dysfunctional conflict • Reasons for conflict (including culture and diversity – refer inclusivity) <p>Outline possible outcomes of conflict determined by (inter alia) management skills.</p> <p>Make recommendations regarding the management of conflict through stimulating conflict (devil's advocacy), negotiation/integration, smoothing, forcing, avoidance and compromise.</p> <p>Show an understanding of Third Party Interventions, e.g. NAPE (National Association of Private Employers), Trade Unions (Definition, Freedom of Association, Functions, Trade Union Representation, Most prominent Trade Unions in SA), Workplace Forums (Functions of WPF, consultation with WPF, joint decision making between management and WPF) and the CCMA(Commission for Conciliation, Mediation and Arbitration) as well as the different roles of each.</p>
<p>12.3.6 Select and motivate a choice of possible business careers and associated career paths.</p>	<p>Learners should be able to:</p> <p>Prioritise chosen careers, and develop action plan for first choice.</p> <p>Show an understanding of specific details required for a career (entrance requirements, length of study, skills needed) and display the ability to obtain the necessary application forms (Higher Education and Training Institution / Job application), to complete and submit them.</p> <p>Evaluate accreditation requirements for the chosen career by elaborating on legitimacy, registration with SAQA (South African Qualifications Authority) as well as global options for the chosen career.</p> <p>Discuss moral, ethical, religious or cultural issues that should be considered in relation to the chosen career.</p> <p>Clarify any EE or BEE considerations for the chosen career.</p>

New Assessment Methods in Business Studies in the FET Phase

<p>12.3.7 Collaborate with others to contribute towards the achievement of specific objectives. (Keep in mind that LO 3 refers to business roles)</p>	<p>This AS is geared towards portfolio work and learners should be able to:</p> <p>Reflect on the importance and relevance of teamwork in different situations.</p> <p>Work in teams to:</p> <ul style="list-style-type: none"> • ensure that processes are properly planned, executed, reviewed and documented. • assess individuals and team success against given criteria. (Specify criteria used.) • discuss issues that impact on working relationships, e.g. prejudice, beliefs, organisational culture, values, diversity and past experiences. <p>Explain the importance of teamwork in big/small projects but also in formal/informal situations.</p>
<p>12.3.8 Meaningfully contribute time and effort to advancing the well-being of others in a business environment.</p>	<p>Learners should be able to:</p> <p>Show an understanding of the importance of Corporate Social Responsibility and the relevance of implementing CSI (Corporate Social Investment) in South Africa.</p> <p>Realistically assess CSI concepts related to the Business Environment and how they affect the local community (outside of school).</p> <p>Design and implement a CSI aspect (Could be portfolio related).</p>
<p>Learners should be able to use the knowledge gained in this section to demonstrate the Assessment Standards in unfamiliar/unrehearsed contexts and to solve problems.</p>	

New Assessment Methods in Business Studies in the FET Phase

Learning Outcome 4: Business Operations	
Demonstrate and apply a range of management skills and specialised knowledge to perform business operations successfully.	
Assessment Standards	Details
<p>12.4.1 Analyse and discuss relevant legislation and the following aspects of the HR function:</p> <ul style="list-style-type: none"> • Recruitment and selection • Employee contracts • Induction and placement • Salary administration • Employee benefits • Skills development 	<p>Learners should be able to:</p> <p>Show an understanding of the following HR (Human Resources) tasks by analysing and discussing each:</p> <ul style="list-style-type: none"> • manpower planning • recruitment • selection • placement • induction • training • evaluation • retention <p>Other:</p> <ul style="list-style-type: none"> • employee contracts • salary administration and determination (scales such as Patterson, cost to company etc.) • employee benefits (including pension, medical aid, housing, fringe benefits, etc.) • Skills development • Structures within industrial relations • Collective bargaining <ul style="list-style-type: none"> – NEDLAC (National Economic Development and Labour Council) – Bargaining structures (bargaining councils, statutory councils, workplace forums) • Dispute resolution (CCMA) • Disciplinary procedures • Grievance procedure <p>Legislation:</p> <ul style="list-style-type: none"> • NEDLAC • Labour Relations Act • Employment Equity Act (affirmative action) • Skills Development Act

New Assessment Methods in Business Studies in the FET Phase

<p>12.4.2 Select a HR activity and carry it out to achieve an identified business objective.</p> <p>NB:</p> <p>This chosen activity may change from year to year. For 2008 "Worker Discipline" has been chosen to achieve the following objectives:</p> <ul style="list-style-type: none"> • Maintaining order and ensuring cooperation • Avoid future problems by ensuring employees know what is acceptable and unacceptable behaviour • Motivate employees and change behaviour where necessary. 	<p>Learners should be able to:</p> <p>Explain the importance of discipline in the workplace:</p> <ul style="list-style-type: none"> • Maintaining order and ensuring cooperation • Avoid future problems by ensuring that employees know what acceptable and unacceptable behaviour is • Motivate employees and change behaviour where necessary <p>Explain the three reasons why an employee may be dismissed (misconduct, retrenchment or incapacity, which may include poor performance or ill health)</p> <p>Explain the aspect of dismissal linked to poor performance by:</p> <ul style="list-style-type: none"> • Differentiating between misconduct and poor performance • Discussing the importance of setting work standards and the role of trade unions • Evaluating the principle of a probation period • Applying guidelines in cases of dismissal based on poor performance
<p>12.4.3 Investigate developments in industrial relations that relate to contemporary business practice.</p>	<p>Learners should be able to:</p> <p>Evaluate:</p> <ul style="list-style-type: none"> • Functions of trade unions and employer organisations • COSATU's (Congress of South African Trade Unions) role in business practice • Industrial action <ul style="list-style-type: none"> – strikes and lock outs (including types of strikes and procedures) – unfair treatment in the workplace – dismissals • Impact of the Basic Conditions of Employment Act • Wages/Sectoral determination as part of Basic Conditions of Employment Act • SAQA • History of trade unions and the impact of the current trade union situation

New Assessment Methods in Business Studies in the FET Phase

<p>12.4.4 Analyse how the quality of performance within the business functions can influence the success and failure of a business.</p>	<p>Learners should be able to:</p> <p>Evaluate different reasons for business success or failure. This may be linked to personal, departmental and overall organisational goals.</p> <p>Differentiate between a variety of methods of quality control (to promote success) that can be applied within an organisation and relevance of each to different situations.</p> <p>For example:</p> <ul style="list-style-type: none">• Sampling in a production environment• Market research undertaken by Marketing department• Job grading (e.g. Patterson) and Performance appraisals undertaken by HR• Self-evaluation
<p>Learners should be able to use the knowledge gained in this section to demonstrate the Assessment Standards in unfamiliar/unrehearsed contexts and to solve problems.</p>	

D. ADMINISTRATIVE AND SUPPORT DOCUMENTATION

1. Administrative Documentation for Portfolio

1.1 Educator's Portfolio Documentation

- 1.1.1 Annexure A Educator's Portfolio Cover Sheet
- 1.1.2 Annexure B Rank Order Mark Sheet
- 1.1.3 Annexure C Design Grid

1.2 Learner's Portfolio Documentation

- 1.2.1 Annexure D Learner's Portfolio Cover Sheet
- 1.2.2 Annexure E Statement of Authenticity
- 1.2.3 Annexure F Exclusion Letter

1.3 Moderation Documentation

- 1.3.1 Cluster Moderation Guidelines
- 1.3.2 Cluster Moderation Tools
 - A. Pre-assessment Moderation Tool
 - B. Cluster Moderation Tool for Educator's portfolio
 - C. Cluster Moderation Tool for Learner's portfolio
- 1.3.3 Final Moderation Tools
 - A. Final Moderation Tool for Educator's portfolio
 - B. Final Moderation Tool for Learner's portfolio
 - C. Feedback form to the IEB

2. Support Documentation



**NATIONAL SENIOR CERTIFICATE EXAMINATION
BUSINESS STUDIES
EDUCATOR'S PORTFOLIO COVER SHEET**

School:
Educator's Name:

Item	Description	Cross-Reference to File Divider
Section 1: Organisational Aspects		
<p>Note: DO NOT include other information such as Term plans, work schedules etc as these make files unnecessarily bulky and are not required for the External Moderation Process.</p>		
I.	IEB Moderation Selection List <ul style="list-style-type: none"> • Signed by Educator and Principal 	
II.	Rank Order List <ul style="list-style-type: none"> • For ALL Learners in the grade 	
III.	Other: Exclusion letters or any other information that needs to be communicated to Portfolio Moderators (e.g. when a learner gets zero, absent from Portfolio task).	
Section 2: Tasks		
This Section must contain - Tasks as given to Learners <ul style="list-style-type: none"> ❖ Design grids for exams and tests ❖ Assessment Guidelines (Memoranda, Rubrics, Rating Scales, etc) ❖ Where Learners have a choice of tasks to use, copies of ALL TASKS and Assessment Guidelines must be available in the Educator's Portfolio. ❖ Refer to the Subject Assessment Guidelines for details of the requirements for each task. 		
1.	Primary Research Task	
2.	Secondary Research Task	
3.	Oral/Debate	
4.	Elective	
5.	<ul style="list-style-type: none"> • Paper 1 Type Test • Paper 2 Type Test 	
6.	Preliminary Examination	

New Assessment Methods in Business Studies in the FET Phase

1.1.2 ANNEXURE B: LEARNER RANK ORDER MARK SHEET



NATIONAL SENIOR CERTIFICATE EXAMINATION BUSINESS STUDIES LEARNER RANK ORDER MARK SHEET

Name of School:								
Date:								
Rank No	Name of Learner	Primary	Secondary	Oral/	Elective	Controlled	Prelim	TOTAL
		Research	Research	Debate		Tests	Exam	
1								0
2								0
3								0
4								0
5								0
6								0
7								0
8								0
9								0
10								0
11								0
12								0
13								0
14								0
15								0
16								0
TOTALS		0	0	0	0	0	0	0

We, the undersigned, declare that these marks are a true reflection of the Learners' achievements.

Principal

Educator

New Assessment Methods in Business Studies in the FET Phase

1.1.3 ANNEXURE C: DESIGN GRID



**NATIONAL SENIOR CERTIFICATE EXAMINATION
BUSINESS STUDIES
DESIGN GRID**

Design grid for tests and examinations																							
Allocation of marks to LOs and ASs																							
Question Number	LO 1				LO 2					LO 3								LO 4				Cognitive Level	
	1	2	3	4	1	2	3	4	5	1	2	3	4	5	6	7	8	1	2	3	4		

Analysis of proportion of cognitive levels

Cognitive level	1	2	3	4	5	6
Question nos						
No. of marks						
Expected %	60%			40%		
Actual %						

Weighting of LOs

	Percentage of test / exam
LO 1	
LO 2	
LO 3	
LO 4	

New Assessment Methods in Business Studies in the FET Phase

1.2.1 ANNEXURE D: LEARNER'S PORTFOLIO COVER SHEET



NATIONAL SENIOR CERTIFICATE EXAMINATION
BUSINESS STUDIES
LEARNER'S PORTFOLIO COVER SHEET
Business Studies

Portfolio Cover Sheet - Grade 12 - 2008

Name: _____ School: _____ Exam Number: _____

Item Number:	Description:	Actual Mark:	Out of:	Percentage:	Portfolio Mark:	Weighting:	Level Achieved:
Projects:							
Primary Research						20	
Secondary Research						20	
Other							
Oral / Debate						10	
Elective						5	
Tests:							
Paper 1 - Format						10	
Paper 2 - Format						10	
Mid-Year Exam:							
...						25	
Total Portfolio	<i>Please Note: User group moderation may occur at this stage.</i>			100	

We, the undersigned, hereby verify that these marks have been checked and are correct.

Learners's Signature: _____ Educator's Signature: _____ on: 13 September 2007



NATIONAL SENIOR CERTIFICATE EXAMINATION
BUSINESS STUDIES
STATEMENT OF AUTHENTICITY

Non-Plagiarism Declaration for Portfolio as a whole

These declarations by both the Candidate and the Educator must be completed and filed immediately after the Portfolio Cover Sheet in the Learner's File.

Centre Number: _____

Candidate's Examination number: _____

DECLARATION BY THE CANDIDATE:

I, _____ (print full names) declare that all external sources used in my portfolio have been properly referenced and that the remaining work contained in this portfolio is my own original work. I understand that if this is found to be untrue, my portfolio will be liable for disqualification.

Signed: _____ Date: _____

Candidate

DECLARATION BY THE CANDIDATE'S EDUCATOR:

I _____ (print name and title of

Educator) at _____ (print name of school) declare that the work provided by this candidate has been monitored and checked for plagiarism.

Signed: _____ Date: _____

Educator

Non-Plagiarism Declaration for Projects

This needs to be included with every Research Project done. It is more specific, and must be adapted to include all the names of team members working on the Primary Research Project. It must cover the following:

- A statement, in your own words, that states that you did not plagiarise in any way.
- The SPECIFIC name of the project. (i.e. You may not refer to “in this project”).
- The name of the school and subject (this is for Portfolio purposes)
- The full names and signatures of all those who worked on the project: **YOU MAY MAKE THIS DECLARATION INDIVIDUALLY OR COLLECTIVELY.**
- The date you signed the declaration.
- Signatures must be **IN BLACK INK.**

NOTE: REMEMBER that the only proof you have is in a detailed Reference List.

Non-Plagiarism Declaration

I, _____ (Full name), hereby declare that this assignment is my own, original work and that I did not plagiarize in the following project in any way:

SCHOOL NAME: _____

SUBJECT: _____

PROJECT TITLE: _____

Where a secondary source (verbal, printed or electronic) has been used, I have carefully acknowledged and referenced it in accordance with [Name of School] Plagiarism Policy. I include a full Reference list of all sources used as proof. I understand what plagiarism is, and accept [Name of School] Plagiarism Policy in this regard. I have also not allowed anyone else to borrow or copy my work.

Date: _____ Signature: _____

1.2.3 ANNEXURE F: EXCLUSION LETTER



NATIONAL SENIOR CERTIFICATE EXAMINATION BUSINESS STUDIES EXCLUSION LETTER FOR MISSING PORTFOLIO WORK

Every effort should be made to allow the learner to catch up a missed portfolio task. If a Portfolio is submitted without a piece of work, the following should be in its place:

- A letter explaining the situation, on an official school letterhead.
- The letter must be signed by the Principal, the Educator and the Learner.
- Any other supporting documentation such as a doctor's certificate must be attached to the letter.
- If a piece of work is lost after it has been marked, the Educator must submit some proof of the mark – such as a detailed mark-sheet for that term, the learner's overall ranking in the class and ranking for that specific item.

Plagiarised Projects

Details are also required when a learner has been given zero for a plagiarised piece of

work. In this case a copy of the piece of work can also be included, (even if no marks are included), as it does indicate to us that the Educator is vigilant regarding plagiarism.

1.3.1 CLUSTER MODERATION GUIDELINES



NATIONAL SENIOR CERTIFICATE EXAMINATION
BUSINESS STUDIES
CLUSTER MODERATION GUIDELINES

1. Documents needed

Other than the necessary moderation sheets and individual tasks and portfolios, the following documentation needs to be available at each cluster meeting. As they are lengthy, it is suggested that copies are made and kept by the Cluster Leader to ensure that they are available at each meeting, unless each Educator commits to bringing their own copies to each meeting.

- National Curriculum Statement
- Summary of NCS (for quick reference)
- Subject Assessment Guidelines
- The taxonomy of cognitive levels that they are using to design their portfolio tasks, e.g. Bloom's, Bigg's SOLO.

2. Moderation at School

It is expected that moderation of the assessment process has taken place at school level to ensure that assessment is valid, fair and reliable. This includes moderation of portfolio assessments before they are done by learners, and moderation of the marking of the learner evidence by the educator/assessor. Evidence of this having taken place must be included in both the educator's and learner's portfolio.

School moderation should be done in purple pen.

3. Moderation at Cluster Level

This process is in place to improve standards and cross-pollinate ideas. Look for and comment on the positive aspects of the Portfolios but also encourage improvements and make suggestions for future use. It is important to concentrate on the tasks, not the individuals, and criticism should be constructive.

Cluster moderation should be done in green pen.

3.1 Pre- assessment moderation Meeting

Aim: To moderate tasks before being given to learners.

Timing: Before the end of May

Process:

- If possible, this moderation should be done in groups so that suggestions can be discussed and tasks improved with a variety of input.
- When the cluster is too big, or time is a problem, break into groups of two or three to moderate tasks.
- Tasks with good potential should be adjusted and shared amongst cluster members.
- Pre-assessment moderation sheets must be completed and submitted with Portfolio's.
- Tasks which are developed after this meeting could be emailed to a colleague to be moderated electronically.

3.2 Post- assessment moderation Meeting

Aim: To moderate completed Portfolios before submission to the IEB.

Timing: By the end of September of each year.

Process:

- **The cluster leader should decide how the moderation is to take place.** Friends or colleagues who share a lot of work, or do internal moderation together (when there is only one Business Studies Educator at a school) should not moderate each others' portfolios. Educator A and B should not simply swop Portfolios as this compromises the process. Names can be drawn out of a hat or portfolios passed to the right.
- **The Educator's Portfolio should be moderated first:**
 - **Compliance :**
 - This is important as there is still time to rectify problems before Final Moderation.
 - Check that all the Learners' Portfolio marks are correctly transferred to the Ranking Sheet, and that this sheet contains marks of all Grade 12 Learners for Business Studies in that school.
 - Ensure that no unnecessary documents (e.g. term plans) are included as this adds unnecessary bulk and is not used in the Final Moderation process.

- **Quality of the portfolio tasks:**
 - Moderation of quality is made easier if the pre-assessment moderation is done well. Pay specific attention to tasks which may not have been ready to moderate at the first meeting.
 - Ensure that the SAG guidelines are adhered to, e.g. length, rigour or stipulations such as whether it is group or individual work.
 - Use the Rating Scale (on Moderation sheet under Quality), but add suggestions for improvements. Discuss with the Educator concerned if possible.
- **The Learners' Portfolios should be moderated next:**
 - **Compliance:**
 - Ensure all the required portfolio items are included and marked.
 - Ensure that all marks are *correctly* transferred to the Portfolio Cover Sheet.
 - Test checks some of the adding on the Cover Sheet, even in Excel.
 - **Quality of Evidence and Marking**
 - Choose a sample of tasks to check marking against the marking guidelines. The assessment principle of consistency requires that a piece of work will get a similar mark when assessed by a different assessor. If this is not the case, analyse and explain the variances.
- **De-brief**

The group should get together again before the end of the meeting and discuss the process. Problems should be brainstormed for possible solutions. For example, if there are new educators, one of the trained assessors could organise an afternoon training session for mock-marking, or more tasks can be shared within the group.

The date for the next meeting should be set.

New Assessment Methods in Business Studies in the FET Phase

3.2.1 Compilation of Educators' Portfolio

The Educators' portfolio is to be set out in the following way:

- Educators' portfolio cover sheet. Refer to Annexure A
- Rank Order mark sheet. Refer to Annexure B
- List of candidates selected by IEB. Sent to schools by IEB
- Assessment tasks with marking guidelines and design grid in the correct order. Refer to Annexure C

Component	Weighting
Primary Research Task	20%
Secondary Research Task	20%
Oral/Debate	10%
Elective	5%
Two controlled tests	20%
Midyear or preliminary examination	25%

- Evidence of school moderation
- Evidence of cluster moderation

3.2.2 Compilation of Learners' Portfolio

The learners' portfolio is to be set out in the following way:

- Learners' portfolio cover sheet. Refer to Annexure D
- Marked assessment tasks with feedback in the correct order
- Statement of Authenticity per task Refer to Annexure E

Component	Weighting	Please add exclusion letters immediately behind Cover Sheet for any missing work.
Primary Research Task	20%	
Secondary Research Task	20%	
Oral/Debate	10%	
Elective	5%	
Two controlled tests	20%	
Midyear or preliminary examination	25%	

<p>Validity</p> <p><i>The assessment measured what it said it did</i></p>	<p>Is the purpose of the assessment clear?</p> <p>Does the way in which the evidence is to be collected suit the purpose of the assessment?</p> <p>Is the Learning Outcome/s and Assessment Standards to be assessed clear?</p> <p>Is there a set of assessment criteria to measure evidence of the LOs and ASs?</p> <p>Do the assessment criteria match the LOs and ASs being assessed?</p> <p>Are the assessment criteria clearly stated in the assessment tool/s?</p> <p>Is the activity done by the learners directly related to the stated LOs, ASs and criteria?</p> <p>Does the assessment reflect internalisation of knowledge and skills allowing the learner to show application/adaptation in unfamiliar circumstances?</p> <p>Does the assessment cater for different levels of learner performance?</p> <p>Is the way in which the evidence is to be collected the best way to gather evidence of the stated outcome/s?</p>
<p>Authenticity</p>	<p>Is the evidence produced (process or product) the learner's own work?</p>

New Assessment Methods in Business Studies in the FET Phase

<p>Consistency/ Reliability</p> <p><i>The same assessor would make the same judgement again in similar circumstances. The judgement made is similar to the judgement that would be made by other assessors.</i></p>	<p>Are the instructions to obtain the evidence clear?</p> <p>Are the criteria being used to measure performance clearly stated to avoid different interpretations by the same assessor or different assessors over time?</p> <p>Is the assessment tool(s) appropriate for the assessment?</p> <p>Is the assessment tool well constructed?</p> <p>Are the judgements of learner performance consistent with the marking guidelines?</p> <p>Are the judgements consistent across learners?</p>
<p>Currency</p> <p><i>Evidence reflects that the skills required are still current</i></p>	<p>Is the evidence required current against the standard e.g. modern techniques, up to date apparatus?</p> <p>Does the evidence show that the learner can still perform to the level shown?</p>
<p>Sufficiency</p> <p><i>Enough evidence of an acceptable level or quality is presented</i></p>	<p>Does the assessment assess a cluster of Assessment Standards, either within an LO or across LOs?</p> <p>Does the assessment cater for different levels of learner performance, i.e. is there sufficient rigour?</p> <p>Is there a variety of ways used to collect evidence to allow for valid judgements to be made?</p> <p>Does the assessment assess evidence of process as well as product?</p>

New Assessment Methods in Business Studies in the FET Phase

<p>Fairness</p> <p><i>The assessment does not present barriers for any one learner</i></p>	<p>Do all learners have access to the resources needed to complete the activity?</p> <p>Was the time allocated sufficient?</p> <p>Is the activity non-discriminatory in terms of race, gender religion, etc.?</p> <p>Is the activity relevant to the context of the learners?</p> <p>Is the language used appropriate to the level of the learners?</p> <p>Are the instructions clear?</p> <p>Is the stimulus material appropriate to the level of the learners?</p> <p>Is the expected embedded knowledge appropriate for the level of the learners?</p> <p>Are learners with special needs catered for in the assessment?</p>
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BLOOM'S TAXONOMY OF EDUCATIONAL OBJECTIVES (ADAPTED BY THE IEB)

Level	Description	Explanation	Skills demonstrated	Action verbs
7	Evaluation	Making judgments based on certain criteria	Compare and discriminate between ideas; assess value of theories, presentations; make choices based on reasoned arguments; verify value of evidence; recognize subjectivity	Assess, decide, rank, grade, test, measure, recommend, convince, select, judge, explain, discriminate, support, conclude, compare, summarize, critique, interpret, justify.
6	Synthesis	The ability to put elements together to form a new whole	Use old ideas to create new ones, generalize from given facts, relate knowledge from several areas, predict, draw conclusions	Combine, integrate, modify, rearrange, substitute, plan, create, design, invent, what if? Compose, formulate, prepare, generalize, rewrite, categorize, combine, compile, reconstruct
5	Analysis	The ability to break down a whole into its component parts. Elements embedded in a whole are identified and the relations among the elements are recognised	Seeing patterns, organization of parts, recognition of hidden meanings, identification of components.	analyze, separate, order, explain, connect, classify, arrange, divide, compare, select, infer, break down, contrast, distinguish, diagram, illustrate
4	Application	The ability to use (or apply) information in new situations	Use information, use methods, concepts, theories in new situations, solve problems using required skills or knowledge	apply, demonstrate, calculate, complete, illustrate, show, solve, examine, modify, relate, change, classify, experiment, discover, construct, manipulate, prepare, produce
3	Comprehension	First level of understanding, recall and understand information, describe meaning	Understanding information, grasp meaning, translate knowledge into new context, interpret facts, compare, contrast, order, group, infer causes, predict consequences	summarize, describe, interpret, contrast, predict, associate, distinguish, estimate, differentiate, discuss, extend, comprehend, convert, defend, explain, generalize, give example, rewrite
2	Knowledge	Act of remembering facts. Only recall	Observation and recall of information	list, define, tell, describe, identify, show, know, label, collect, select, reproduce, match, recognize, examine, tabulate, quote, name
1	Fragmented knowledge	Recalls knowledge with errors	Unable to recall accurately or coherently; partial recall	-

New Assessment Methods in Business Studies in the FET Phase

1.3.2. A PRE-ASSESSMENT MODERATION TOOL



NATIONAL SENIOR CERTIFICATE EXAMINATION
BUSINESS STUDIES
PRE-ASSESSMENT MODERATION SHEET
(MODERATION OF TASKS BEFORE BEING GIVEN TO LEARNERS)

Name of School:

Compliance to Requirements of Subject Assessment Guidelines

Primary Research Project: 20%

Research Component: Provision on Task for:

Groupwork (Max 4 learners)	Proper Field Research	Relevance to topic	Research Aim stated	Minimum of two sources	Data collection method specified.

Written Component: Requirements stated:

Index	Rationale	Raw Data Summary	Analysis of Data	Discussion of findings	Conclusion	Glossary	Reference List	Non-Plagiarism Statement	Authenticity Statement

Secondary Research Project 20%

Research Component: Provision on Task for:

Individual Work (Max 4 learners)	Proper Desk Research	Relevance to topic	Research Aim stated	Minimum of three sources	Data collection method specified.

Written Component: Requirements stated:

Index	Rationale	Raw Data Summary	Analysis of Data	Discussion of findings	Conclusion	Glossary	Reference List	Non-Plagiarism Statement	Authenticity Statement

New Assessment Methods in Business Studies in the FET Phase

Oral/Debate 10%

Format specified?	Source of info specified (e.g. articles, project research)	Proof (e.g. speech cards) for Portfolio.	Specific requirements if it is a Group Oral/Debate.	Other?

Elective 5%

Format specified?	May NOT be a test or exam.	Proof to be included for Portfolio.	Specific requirements if it is Groupwork.	Other?

Two Controlled Tests 20%

Across Two tests: At least 40/60 Cognitive Level ratios.

Controlled Test 1

Format : Paper I Type	50 – 100 marks	At least 2 – 3 ASs covered	Full Marking Guidelines included?	Must included Data Response type questions.

Controlled Test 2

Format : Paper I Type	50 – 100 marks	At least 2 – 3 ASs covered	Full Marking Guidelines included?	Must included Data Response type questions.

Preliminary Exam 25%

Format : Paper I	Format: Paper II	Time allocation: 2hours per Paper	Full Marking Guidelines included?	Other?

New Assessment Methods in Business Studies in the FET Phase

Quality

<u>Rating Scale:</u>								
1 – Not done or totally incorrect.			3 - Adequate					
2 – Inadequate			4 - Superb					
Evidence of.....	Weighting	Assessment Principles						Comments
		Validity	Authenticity	Consistency	Currency	Sufficiency	Fairness	<u>Note:</u> Shaded columns indicate Principles which are assessed on the Learner's Portfolio.
Primary Research Project	20%							
Secondary Research Project	20%							
Oral/ Debate	10%							
Elective	5%							
Two Controlled Tests	20%							
Preliminary Exam	25%							

Moderated by:

Name: _____ School: _____

Moderator's Signature: _____ Date: _____

New Assessment Methods in Business Studies in the FET Phase

1.3.2.B CLUSTER MODERATION TOOL: EDUCATOR'S PORTFOLIO



NATIONAL SENIOR CERTIFICATE EXAMINATION
BUSINESS STUDIES
CLUSTER MODERATION TOOL: EDUCATOR'S PORTFOLIO

School: _____

Compliance	Presentation	Acceptable type of file?	Relevant information on cover?	Marked file dividers?	Correct order of sections?	No loose pages?	
	Information	Contents page included	Correct IEB Cluster sample moderation list - signed	Ranking Sheet for all learners	Proof of School Moderation		
	Comment:						
Quality	<p>Rating Scale: 1 - Not done or totally incorrect 2 – Inadequate 3 - Adequate 4 - Superb</p>						
	Evidence of.....					Comments	
							Note: Numbers in this column refers to standard comments on the back.
		Correct Weighting	Instructions	Compliance with SAG requirements	Design Grid	Marking Guidelines	
	Primary Research	20%					
	Secondary Research	20%					
	Oral/Debate	10%					
	Elective	5%					
Two Controlled Tests	20%						
Preliminary Exam	25%						

New Assessment Methods in Business Studies in the FET Phase

STANDARD MODERATION FILE COMMENTS: EDUCATOR'S PORTFOLIO

1.	Files: No larger than a ring-binder, preferably a flat file. Pages must be punched and filed, not clipped in. <i>NO CONCERTINA FILES OR WORK IN PLASTIC SLEEVES PLEASE!</i> Marked File Dividers for each section in the same order as the Cover Sheet.
2.	Standardisation: If Files are not standardised, it wastes time during the moderation process. Please use the New Educators Index.
3.	Correct IEB Moderation Selection List: Without this, it is impossible to see which Portfolios were selected, and whether the correct ones were sent. This must be signed by the Principal.
4.	Ranking Sheet: Please use the New Excel Ranking Sheet to submit the marks of ALL learners. It is important to see where the selected portfolios fit into the ranking.
5.	Primary Research Project: Must comply with requirements – i.e. be Field Research, Group-based and include all aspects as laid down in SAG Section C.
6.	Secondary Research Project: Must comply with requirements – i.e. be Desk Research, Individually done and include all aspects as laid down in SAG Section C.
7.	Oral/Debate: Must comply with requirements – i.e. include written proof, and where done as a debate or oral, all group members must actively participate in the oral component.
8.	Elective: Must comply with all requirements – i.e. may not be a test or exam, but must be of sufficient rigour to include 40% Higher Order Thinking Skills.
9.	Preliminary Exam: This must be in the same format as the IEB final exam, i.e. include a 2hr 200 mark Paper 1 and 2hr 100 mark Paper 2 component.
10.	<p>ALL TESTS: Must conform to the IEB Requirement of :</p> <ul style="list-style-type: none"> • At least 50 – 100 marks • Cover at least 2 – 3 ASs for sufficiency. • Across the two tests, the cognitive level weighting must be 40/60. <p>This, together with proper headings regarding topic, must be shown at the top of all tests and exams. Learner's tests should indicate topic for easy reference.</p>
11.	Absence from Portfolio Tasks: Learners must be given the opportunity to make up missed tasks, or do an equivalent task. If this is not possible, a doctor's letter as well as a letter signed by both the Educator and the Principal explaining the omission must be included.
12.	Marking Guidelines: A learner's answers MAY NOT BE used as marking guidelines.
13.	Rounding off: Please work to two decimal points on individual tasks and do not round off until final Portfolio mark has been obtained.

Moderated by:

Name: _____

School: _____

Moderator's signature: _____

Date: _____

New Assessment Methods in Business Studies in the FET Phase

1.3.2.C CLUSTER MODERATION TOOL: LEARNER'S PORTFOLIO



NATIONAL SENIOR CERTIFICATE EXAMINATION
BUSINESS STUDIES
CLUSTER MODERATION TOOL: LEARNER'S PORTFOLIO

School:

Compliance	Presentation	Relevant information on cover?	Marked file dividers?	Correct order of sections?	No loose pages?
	Information	Completed Excel Cover Sheet	Proof of School Moderation		Proof of Authenticity - Educator has Checked for Plagiarism.
	Comments:				

Quality	Rating Scale: 1 - Not done or totally incorrect 2 – Inadequate 3 - Adequate 4 - Superb									
	Evidence of.....							Comments		
		Correct Weighting	Instructions *	Compliance to SAG requirements	Evidence of Completed Task	Non-Plagiarisms Statement	Marking to Guidelines	Note: Numbers in this column refers to standard comments on the back. * Instructions need only to be included if there is a choice of items i.e. different learners are included different tasks.		
	Primary Research	20%								
	Secondary Research	20%								
	Oral/Debate	10%								
	Elective	5%								
	Two Controlled Tests	20%								
Preliminary Exam	25%									

New Assessment Methods in Business Studies in the FET Phase

STANDARD MODERATION FILE COMMENTS: LEARNERS PORTFOLIOS

	Files: No larger than a ring-binder, preferably a flat file. Pages must be punched and filed, not clipped in. <i>NO CONCERTINA FILES OR WORK IN PLASTIC SLEEVES PLEASE!</i> Marked File Dividers for each section in the same order as the Cover Sheet.
	Standardisation: If Files are not standardised, it wastes time during the moderation process. Please use the New Excel Portfolio Cover Sheet.
	Primary Research Project: Must comply with requirements – i.e. be Field Research, Group-based and include all aspects as laid down in SAG Section C.
	Secondary Research Project: Must comply with requirements – i.e. be Desk Research, Individually done and include all aspects as laid down in SAG Section C.
	Oral/Debate: Must comply with requirements – i.e. include written proof, and where done as a debate or oral, all group members must actively participate in the oral component.
	Elective: Must comply with all requirements – i.e. may not be a test or exam, but must be of sufficient rigour to include 40% Higher Order Thinking Skills.
	Preliminary Exam: This must be in the same format as the IEB final exam, i.e. include a 2hr 200 mark Paper 1 and 2hr 100 mark Paper 2 component.
	<p>ALL TESTS: Must conform to the IEB Requirement of :</p> <ul style="list-style-type: none"> • At least 50 – 100 marks • Cover at least 2 – 3 ASs for sufficiency. • Across the two tests, the cognitive level weighting must be 40/60. <p>This, together with proper headings regarding topic, must be shown at the top of all tests and exams. Learner’s tests should indicate topic for easy reference.</p>
	Absence from Portfolio Tasks: Learners must be given the opportunity to make up missed tasks, or do an equivalent task. If this is not possible, a doctor’s letter as well as a letter signed by both the Educator and the Principal explaining the omission must be included.
	Choice Tasks: Where the Learner has a choice between tasks to be included in the Portfolio, copies of the given task must be included.
	Plagiarism: Initial check is a scrutiny. If there is any reason to suspect plagiarism, further checking is done.
	Other:

Moderated by:

Name: _____

School: _____

Moderator’s Signature: _____

Date: _____

New Assessment Methods in Business Studies in the FET Phase

1.3.3.A FINAL MODERATION TOOL: EDUCATOR'S PORTFOLIO



NATIONAL SENIOR CERTIFICATE EXAMINATION
BUSINESS STUDIES
FINAL MODERATION TOOL: EDUCATOR'S PORTFOLIO
To be returned to the school

EXAMINATION CENTRE NUMBER:								
Compliance	Presentation	Acceptable type of file?	Relevant cover information/	Marked file dividers?	Correct order of sections?	No loose pages?		
	Information	Contents page included	Correct signed IEB Cluster sample moderation list	Ranking Sheet for all learners	Proof of School Moderation	Proof of Cluster Moderation		
	Comment:							
Quality	Rating Scale: <u>1</u> - Not done or totally incorrect 2 – Inadequate 3 - Adequate 4 - Superb							
	Evidence of.....						Comments	
		Correct Weighting	Instructions	Compliance to SAG requirements	Design Grid	Marking Guidelines		Note: Numbers in this column refers to standard comments on the back.
	Primary Research	20%						
	Secondary Research	20%						
	Oral/Debate	10%						
	Elective	5%						
	Two Controlled Tests	20%						
Preliminary Exam	25%							

New Assessment Methods in Business Studies in the FET Phase

STANDARD MODERATION FILE COMMENTS: EDUCATOR'S PORTFOLIO

1	Files: No larger than a ring-binder, preferably a flat file. Pages must be punched and filed, not clipped in. <i>NO CONCERTINA FILES OR WORK IN PLASTIC SLEEVES PLEASE!</i> Marked File Dividers for each section in the same order as the Cover Sheet.
2	Standardisation: If Files are not standardised, it wastes time during the moderation process. Please use the New Educators Index.
3	Correct IEB Moderation Selection List: Without this, it is impossible to see which Portfolios were selected, and whether the correct ones were sent. This must be signed by the Principal.
4	Ranking Sheet: Please use the New Excel Ranking Sheet to submit the marks of ALL learners. It is important to see where the selected portfolios fit into the ranking.
5	Primary Research Project: Must comply with requirements – i.e. be Field Research, Group-based and include all aspects as laid down in SAG Section C.
6	Secondary Research Project: Must comply with requirements – i.e. be Desk Research, Individually done and include all aspects as laid down in SAG Section C.
7	Oral/Debate: Must comply with requirements – i.e. include written proof, and where done as a debate or oral, all group members must actively participate in the oral component.
8	Elective: Must comply with all requirements – i.e. may not be a test or exam, but must be of sufficient rigour to include 40% Higher Order Thinking Skills.
9	Preliminary Exam: This must be in the same format as the IEB final exam, i.e. include a 2hr 200 mark Paper 1 and 2hr 100 mark Paper 2 component.
10	<p>ALL TESTS: Must conform to the IEB Requirement of :</p> <ul style="list-style-type: none"> • At least 50 – 100 marks • Cover at least 2 – 3 ASs for sufficiency. • Across the two tests, the cognitive level weighting must be 40/60. <p>This, together with proper headings regarding topic, must be shown at the top of all tests and exams. Learner's tests should indicate topic for easy reference.</p>
11	Absence from Portfolio Tasks: Learners must be given the opportunity to make up missed tasks, or do an equivalent task. If this is not possible, a doctor's letter as well as a letter signed by both the Educator and the Principal explaining the omission must be included.
12	Marking Guidelines: A learner's answers MAY NOT BE used as marking guidelines.
13	Rounding off: Please work to two decimal points on individual tasks and do not round off until final Portfolio mark has been obtained.

Moderated by:

Name: _____

Moderator's signature: _____

Date: _____

New Assessment Methods in Business Studies in the FET Phase

1.3.3.B FINAL MODERATION TOOL: LEARNER'S PORTFOLIO

**NATIONAL SENIOR CERTIFICATE EXAMINATION
BUSINESS STUDIES: FINAL MODERATION TOOL: LEARNER'S PORTFOLIO**

To be returned to the school

EXAMINATION CENTRE NUMBER:							
Compliance	Presentation	Relevant information on cover?	Marked file dividers?	Correct order of sections?	No loose pages?		
	Information	Completed Excel Cover Sheet	Proof of School Moderation	Has Educators for Checked for Plagiarism?	Proof of Cluster Moderation		
	Comments:						
Quality	Rating Scale: 1 - Not done or totally incorrect 2 – Inadequate 3 – Adequate 4 - Superb						
	Evidence of.....	Correct Weighting	Instructions *	Compliance with SAG	Evidence of Completed Task	Marking to Guidelines	Comments
							Note: Numbers in this column refers to standard comments on the back.
							* Instructions need only to be included if there is a choice of items i.e. different learners are included different tasks.
	Primary Research	20%					
	Secondary Research	20%					
	Oral/Debate	10%					
	Elective	5%					
Two Controlled Tests	20%						
Preliminary Exam	25%						

New Assessment Methods in Business Studies in the FET Phase

STANDARD MODERATION FILE COMMENTS: LEARNERS FILES

1	Files: No larger than a ring-binder, preferably a flat file. Pages must be punched and filed, not clipped in. <i>NO CONCERTINA FILES OR WORK IN PLASTIC SLEEVES PLEASE!</i> Marked File Dividers for each section in the same order as the Cover Sheet.
2	Standardisation: If Files are not standardised, it wastes time during the moderation process. Please use the New Excel Portfolio Cover Sheet.
3	Primary Research Project: Must comply with requirements – i.e. be Field Research, Group-based and include all aspects as laid down in SAG Section C.
4	Secondary Research Project: Must comply with requirements – i.e. be Desk Research, Individually done and include all aspects as laid down in SAG Section C.
5	Oral/Debate: Must comply with requirements – i.e. include written proof, and where done as a debate or oral, all group members must actively participate in the oral component.
6	Elective: Must comply with all requirements – i.e. may not be a test or exam, but must be of sufficient rigour to include 40% Higher Order Thinking Skills.
7	Preliminary Exam: This must be in the same format as the IEB final exam, i.e. include a 2hr 200 mark Paper 1 and 2hr 100 mark Paper 2 component.
8	<p>ALL TESTS: Must conform to the IEB Requirement of :</p> <ul style="list-style-type: none"> • At least 50 – 100 marks • Cover at least 2 – 3 ASs for sufficiency. • Across the two tests, the cognitive level weighting must be 40/60. <p>This, together with proper headings regarding topic, must be shown at the top of all tests and exams. Learner’s tests should indicate topic for easy reference.</p>
9	Absence from Portfolio Tasks: Learners must be given the opportunity to make up missed tasks, or do an equivalent task. If this is not possible, a doctor’s letter as well as a letter signed by both the Educator and the Principal explaining the omission must be included.
10	Choice Tasks: Where the Learner has a choice between tasks to be included in the Portfolio, copies of the given task must be included.
11	Plagiarism: Initial check is a scrutiny. If there is any reason to suspect plagiarism, further checking is done.
12	Other:

Moderated by:

Name: _____

Moderator’s Signature: _____

Date: _____

1.3.2.C FEEDBACK FORM TO THE IEB



**NATIONAL SENIOR CERTIFICATE EXAMINATION
BUSINESS STUDIES**

IEB FINAL PORTFOLIO MODERATION TOOL

To be completed and retained by the IEB

Subject: BUSINESS STUDIES

Date: _____

Examination Centre Number: _____

The candidates required to submit portfolios for moderation (names supplied by IEB)

Examination number	School Mark (%)	Moderated Mark (%)	Examination number	School Mark (%)	Moderated Mark (%)

Comments:

Recommendations:

PORTFOLIO MARKS SHOULD BE ACCEPTED WITHOUT ALTERATION	<i>Yes</i>	<i>No</i>
---	------------	-----------

Change recommended by moderator:

Change to be implemented:

Portfolio Moderator's signature

Date:

Appendix C

Business Economics Portfolios (HG & SG)

Moderators Report - 2007

Part B – For Distribution

General

The majority of Educators are starting to take note of the Portfolio requirements, and once again the compliance was an improvement on last year. Standards were, with the exception of a few schools who were flagged due to concerns regarding this, acceptable. The logistics of moderating so many schools and portfolios is however complicated by Educators who still insist on using incorrect (bulky, hard-covered or loose-leaf) files, and do not mark individual files with the correct information on the covers – School name, centre number and Educator/Learner Portfolio.

Issues affecting 2008 – FET Business Studies

- Compliance

All the listed Portfolio's called for final moderation must be sent – any discrepancies must be explained on school letterhead and signed by both Principal and Head of Department/Teacher.

Copies of cluster moderation forms must be included, and as from 2008, proof of School moderation is also required.

Educator's and Learner's portfolios must correspond. It is not possible to check the marking standards if the Memorandum for a piece of work is not included in the Educators Portfolio. It is also important to USE HEADINGS and dates – many pieces of work (especially tests) are difficult to identify and a lot of time is wasted trying to match questions instead of being able to identify it by means of a heading.

- Specific issues

Common Trials/Prelim papers – the standard of prelim papers that were generated at some cluster groups were generally of a good standard. However, these common papers need to be carefully moderated as mistakes get multiplied across all the schools using that exam paper. Clusters must be careful with the distribution of these common papers as the integrity of the exam paper could be compromised.

Oral presentations

- Learner's evidence must be included, even if based on project. This could include cue cards, rough notes or even a mind-map.
- In many cases there are no instructions for the orals, making it difficult to see what was required.
- Rubrics in this section are notoriously bad, and need urgent attention in the future.
- Very few schools have ventured into other formats such as group orals, debates or peer evaluation, and these are certainly aspects that could be given more attention in the future.

Research Projects - compliance to requirements

Lack of depth – e.g. only textbook information required. Minimal effort and extension of learners' interaction with the material required.

Marking of projects –

- leniency and "thumb-suck"/impression marking often due to badly designed rubrics (Checklists & Assessment Grids are not effective rubrics)
- Referencing – there is an urgent need to educate both Educators and learners on aspects such as:
- Correct referencing techniques
- Citing in text
- Quantities of quoted material (should be less than 10%)
- Referencing of graphs, visuals, tables and other forms of data

- Learner interaction with material. Too often tables, graphs, data or information is added just to 'bulk up' the project, but the learner does not refer to or use it in any way.
- The correct use of Addendums, where there is a reason to include documents such as Founding Statements, contracts etc.
- Plagiarism – Problems are still occurring such as
- Obviously downloaded material – it is a major concern when Educators do not recognise this.
- Educators who comment on plagiarised material, but do not penalise the learner.
- Quantities downloaded even when referenced.

- **Standards**

Standard of marking – still a problem. Two marks given when full facts or examples asked for in question were not given, as well as incorrect facts being marked as correct. With the change of marking method on the FET (no time to mark ratio) this may be more of a problem going forward.

Beware of 'Groupthink'. Clusters must be vigilant against accepting tasks, exams or tests without checking against SAG requirements. E.g. The "Wall Street movie" exercise (an Accounting exercise) used by some schools as their research portfolio when the exercise itself contains no research elements.

Weighting of marks – use correct forms, especially computerised version which will calculate marks, weighting and levels of achievement!

Business Studies Portfolio Moderator: Y. Russell

Appendix D

Letters of Permission

The following signed letters of permission were obtained from the members of the transitional examination panel for Business Studies in the IEB.

Yvette Russell

Private Bag X3
0635
1752 Paardekraal
1178

Tel: 011 469

Fax: 011 273

5 November 2008

Dear Colleagues

Re: Masters Dissertation

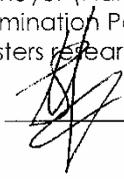
As you are aware, I am in the process of writing my Masters dissertation which entails a case study documenting the New Assessment Methods in Business Studies in the IEB. This includes both changes to the examination structure and the introduction of portfolios over the last few years under the old system, and all the issues related to carrying these through to the new system.

I hereby request your permission to use your name, as a member of the Examination Panels (past and present), in the course of documenting your role in the process. Please return an original signed copy of this letter (for inclusion in the addendum to the Masters) if you are willing to grant this permission.

With thanks


Yvette Russell

I, Estie Meyer (Name) grant permission for my name/role as a member of the Examination Panel(s) of the IEB to be documented for the purposes of the Masters research conducted by Yvette Russell.

Signed: 

Date: 5 November 08

Yvette Russell

Private Bag X3
1752 Paardekraal

Tel: 469 0635
FAX: 273 1178

21 October 2008

Dear Colleagues

Re: Masters Dissertation

As you are aware, I am in the process of writing my Masters Dissertation which entails a case study documenting the New Assessment Methods in Business Studies in the IEB. This includes both changes to the examination structure and introduction of Portfolios over the last few years under the old system, and all the elements of the new system.

This letter serves to ask your permission to use your name in the process of documenting your role in the process as part of the Examination Panels (past and present). Please return an original signed copy of this letter if you are happy to grant this permission.

With thanks



Yvette Russell

I, SEAN GORDON TOPPER (Name) give permission for my role in the Examination Panel(s) of the IEB to be documented for purposes of the Masters Research for Yvette Russell.

Signed: _____

Date: 5/11/2008

Yvette Russell

Private Bag X3
0635
1752 Paardekraal

Tel: 011 469
Fax: 011 273 1178

~~~~~  
5 November 2008

Dear Colleagues

Re: Masters Dissertation

As you are aware, I am in the process of writing my Masters dissertation which entails a case study documenting the New Assessment Methods in Business Studies in the IEB. This includes both changes to the examination structure and the introduction of portfolios over the last few years under the old system, and all the issues related to carrying these through to the new system.

I hereby request your permission to use your name, as a member of the Examination Panels (past and present), in the course of documenting your role in the process. Please return an original signed copy of this letter (for inclusion in the addendum to the Masters) if you are willing to grant this permission.

With thanks

  
Yvette Russell

I, Jose Oliveira (Name) grant permission for my name/role as a member of the Examination Panel(s) of the IEB to be documented for the purposes of the Masters research conducted by Yvette Russell.

Signed:  Date: November 2008